**2015 Legislative Leadership Workshop**

**Changing Lives through Laws**

*Takeaway Notes and Supplemental Information*

**Introduction**

In November 2015 NABS partnered with the NFB of Connecticut to put on an interactive and informative legislative workshop. The goal was to turn students into savvy legislative advocates in the course of one afternoon. The workshop was a great success, and these notes are intended to reinforce the lessons learned and supplement the information provided at the workshop for those who attended, and to offer some of the benefits of the workshop to those who were unable to make it to New London CT for the event.

The information, tips, and how tos presented in this document represent the distillation of the accumulated knowledge of individuals with decades of experience working as lobbyists and staffers on Capitol Hill. And while I focus on strategy for moving federal legislation, much of what is presented is applicable to legislative advocacy on the state level, too. Whether your interest is in moving legislation related to blindness, or changing laws around any other issue that you might care about, these techniques and tips are tried and true.

This document is broken down into three sections:

1. Laying the Groundwork (How to get and prepare for a meeting)

2. Executing the Meeting (How to maximize your persuasiveness and chances for success)

3. Bringing it Home (How to advocate for legislative change from outside DC)

**MODULE I: Laying the Groundwork**

***Know the Facts***

What is a fact sheet and how can we use it to prepare to speak confidently on our issues?

A fact sheet is a short, concise, overview of an issue. It doesn’t give all the nitty gritty details, but rather provides a broad view. Generally a fact sheet will have two key components: 1) a description of the problem and 2) a proposed solution to that problem. A fact sheet is created with two audiences in mind. First, it is intended for Members of Congress and their staffers. No legislator worth her salt will decide to support a bill based on a fact sheet alone. The fact sheet is meant to introduce an issue, pique interest, and serve as a reference document to quickly remind the reader of the key facts around an issue.

Second, the fact sheet is used by Grass roots advocates and constituents to learn enough about the particulars of an issue or bill to talk persuasively and knowledgeably about it. We won’t all be expert on all issues. But we don't have to be. That’s why we have experts at our NFB national headquarters on legislation and advocacy. But we need to be conversant and informed on the basics of what the bill does so that we can make our case to our elected officials.

When you receive a fact sheet, try this: Read the fact sheet and ask yourself: 1) What’s the problem we want to solve? What facts, figures, or stories are presented and provide compelling evidence of the need for legislation? And 2) What is the proposed legislative fix? Remember, it may be a bill that already exists, or just a legislative concept, it depends on how far along in the process we are. If you understand and can clearly articulate the answers to these questions, you will be well-prepared to speak convincingly to your Representatives in Congress.

***Who do you want to talk to?***

First you must know who you need to talk to. As an individual, you have three Congressional offices that represent you directly on the federal level – the two Senators from your state and one Representative in the House. If you do not know who these elected officials are, you can look them up on [www.senate.gov](http://www.senate.gov) and [www.house.gov](http://www.house.gov) by entering your address.

Ok, now you know which offices, but who in these offices do you want to talk to?

First it is useful to understand the structure of a Congressional office. This varies slightly from office to office, and Senate offices have larger staffs than do those in the House, but the basic outline here is pretty consistent. Here's the hierarchy and brief descriptions of positions:

* Senator/Representative: This person is the elected official and makes the final call on any decisions regarding which bills to support, what issues to prioritize, etc. He or she is the boss and has final say on everything.
* Chief of Staff: This individual is responsible for the overall management of the entire office and is concerned with all matters policy, political, and administrative. He or she is the right hand of the elected official.
* Legislative Director: The Legislative Director is in charge of managing all policy and legislative initiatives that an office is working on. He or she will report to the Chief of Staff or the Member directly. He or she will also manage all the legislative staff in the office. The Legislative Director is referred to as the LD by Hill insiders or those in the know.
* Legislative Assistant: There will be multiple Legislative Assistants, referred to as Las, in every office. Each individual LA is in charge of a portfolio of issues. For example, one will handle education, labor and family issues, another will cover military and veterans' issues, another environmental and energy issues, etc. The breakdown of the issue portfolios differs from office to office. Note that the LD will frequently also handle a portfolio of issues in addition to managing the Las.
* Legislative Correspondent: There will be at least one, and probably more, so called LC in every office. These staffers are more junior than the Las and do not handle substantive policy issues. LCs are primarily responsible for drafting form letters and responses to constituent correspondence related to policy issues.
* Scheduler: This person is in charge of all scheduling for the elected official. Frequently the Scheduler will also handle the schedules of the Chief, LD and Las. It just depends on the office.
* Staff Assistant: Staff assistants answer phones and support the office on administrative tasks.
* Interns: Every office has interns. They are pretty much like unpaid Staff Assistants with somewhat less responsibility.

Generally speaking, you will want to try to meet with the most senior person or people in the office you can. The best is to meet with the elected official him or herself, as he or she is the only one who can make a firm commitment to sign onto a bill or take any other formal action. After that, the Chief of Staff, Legislative Director and Legislative Assistant are your most desirable targets, in that order. If you are fortunate enough to land a meeting with the elected official, he or she will almost certainly bring the LD or an LA to the meeting, as well. If you don't get to meet with the Member him or herself, do not be disappointed and do not think that the meeting is not worthwhile. The Chief of Staff, LD, and Las all have the ear of the elected official. The LD and Las, in particular, will likely know more about the specific issues you are discussing than does the Senator or Representative they work for. It is the job of the LD and Las to advise their bosses how to vote on bills and what policy issues to support.

Normally LCs and Staff Assistants do not handle meetings on policy or legislative issues. If you end up meeting with one, it probably means that the more senior staff are all booked up. Bluntly, these are not the most impactful meetings. But remember to still bring you’re "A" game and to be as professional, polite, and friendly as you would in any other meeting. You are still making an impression with the office. Also, Washington DC is a very upwardly mobile place. Today's intern, Staff Assistant, or LC may well be an LD or Chief of Staff in only a few years. You will be happy then when they remember you and your issues.

***Making the Meeting Happen***

The process of requesting a meeting in a Congressional office differs a bit from office to office, but the first thing you will always want to do is to pick up the phone. Do not send the request to a general email address listed on the website of your elected official. Instead find their phone number. Or you can also call the Capitol switchboard at (202) 225-3121 and ask to be connected with the offices of your Senators and Representative.

When the Staff Assistant or Intern answers the phone, ask who in their office handles issues related to whatever it is you want to talk about. For example, if you are calling about a bill to create guidelines for accessibility of technology in higher education, ask who in their office handles education issues. If you wish to talk about eliminating subminimum wages for disabled individuals, ask who handles labor issues. If you want to talk about multiple issues, find out who the staffer is who handles each of them. Such calls are very common and your making these inquiries is not at all out of the ordinary. It is vitally important that you take the trouble to identify this person yourself rather than relying on the office to decide who you should meet with. Most often, when an office sees that you are from an organization focused on blindness they will default to scheduling you to meet with the staffer who handles medical issues. For virtually all of the issues that we care about, this is not the appropriate person to talk to. And if you're talking to the wrong person, you are usually wasting both your and their time.

The contact info for the staffer who handles your issue(s) of interest isn't the only piece of info you want though. Remember you would prefer to meet with the elected official or Chief of Staff over any legislative staffer. You need to pursue a meeting with the higher ups differently. But again, the person answering the phone will be able to help you. Just ask how to go about requesting a meeting with the Senator/Congressman/Congresswoman. Some offices will tell you to email the Scheduler and give you the email address. Others will ask you to go to their website and fill out a request form. In either case, provide details about what you want to discuss in the meeting. Mention in the email or on the form that you would like the specific individual(s) who you identified as covering your issue(s) to attend the meeting in addition to the elected official, if possible. Remember, make it clear in the request that you are a constituent. That is very important. Also, the more flexible you can be with timing, the better. If you ask to meet with Senator X on January 25, 26, or 27, for example, you are much more likely to land the Senator him or herself than if you ask for a meeting at 2:00pm on January 26.

You will want to make the meeting request roughly a month prior to the desired meeting date. Be aware that schedules in Washington are always in flux. It is very common to not receive a response to a request for a meeting until quite close to the meeting date. You can certainly politely follow up with the Scheduler if you haven't heard anything after a couple of weeks, however, the meeting may very well not be finalized until only a few days beforehand. Do not call or email multiple times a day or even a week. The Hill is a very fast-paced and busy place and drowning people in correspondence will mostly just annoy them.

If the elected official is not available to meet with you, you will get bumped down to the Chief of Staff, LD, or La who covers your issue. And because you learned who handles your issue and mentioned them in your request, if you get bumped down to an LA, you will get the right one. Because of the fluidity of schedules on the Hill, it is very possible that you will be scheduled to meet with the elected official, but find out when you get there that you have been bumped down to an LA because something came up. Do not be disappointed and do not take the meeting less seriously or treat it any differently than you otherwise would have. Chiefs, LDs and Las have major influence over their bosses and getting them interested or on board can absolutely produce results.

**MODULE II: Executing the Meeting**

***Know Who You’re Talking to***

To be maximally effective in your advocacy, it is crucial to think about how to most persuasively frame issues for offices of different political persuasions and with differing policy priorities. It is not smart to make the same stock pitch in every office you visit. Savvy advocates frame issues differently depending on who the audience is. Note that this absolutely does not mean distorting or omitting facts or providing inaccurate information of any kind. Doing so is the number one way to kill your credibility and make them stop listening to you.

Republicans are generally more receptive to arguments appealing to individualism and market principles, and are usually more reluctant to spend money or get the government involved in regulating things. Democrats on the other hand generally respond best to arguments appealing to fairness and leveling the playing field and see a bigger role for the federal government in most things. Of course these are vast generalizations, but the point is you need to know about the political ideology of the office you're meeting with. Is the Senator a Tea Party Republican, a middle of the road pragmatic Democrat, or a far left liberal? Make sure you know where they stand, and then think about how to present your issue in the terms that they will find most appealing. For example, if arguing for increased funding for early childhood education, with a liberal Massachusetts Democrat you might talk primarily about the unequal educational outcomes for students from disadvantaged backgrounds and how funding would help close the achievement gap. With a moderate business-minded Democrat or Republican you might focus on how such education creates a more able workforce. And for a very conservative Tea Partier you might emphasize how spending money now will actually save the government money in the long-run by reducing costs of incarceration and social welfare and by increasing tax revenue. You are talking about the same program, the same facts, but simply electing to highlight different aspects of the problem and advantages of the solution.

There are considerations beyond party or ideology that should be considered when determining how to talk about the issues or where to focus. Here are a few to consider:

What committees does the elected official sit on? This is an important thing to know. First, the Senator or Representative will be more involved with issues under his or her committee's jurisdiction and, therefore, more knowledgeable about them. But, more importantly, elected officials are much more valuable as supporters if they sit on the relevant committee for the bill or policy issue in question. Bills have to be voted out of committee to be considered by the full House or Senate. Having a champion to shepherd legislation through the committee so it can be considered on the floor is a big deal.

What Congressional Caucuses does the Senator or Representative belong to? Virtually all Members of Congress choose to affiliate themselves with Congressional Caucuses. These are voluntary groups of Senators and Representatives who share a common interest. Some are issue oriented like the Bipartisan Disability Caucus. Some are political, such as the Tea Party Caucus. And still others are affinity-based, for example the Friends of Switzerland Caucus. Knowing what caucuses the elected official belongs to can help you understand what issues and causes are important to him or her, which can help you tailor your message or give you something to bring up during the meeting.

What publically available personal information (past career, memberships in organizations, personal connections, legislative and voting history) might we use and how? Simply reading up a bit on the Senator or Representative can pay great dividends. Was the Senator a high school principle? It would be smart to bring that up if you are talking about a K-12 education issue. For example, "I know that you used to work in secondary education, so I am sure you are well-acquainted with the struggles facing teachers under No Child Left Behind." Is the Congresswoman a member of the League of Conservation Voters? I bet you can guess where she comes down on fracking. Does the Representative have a brother who uses a wheelchair? That may well make him more sympathetic to disability issues. Can the Member's voting history or list of sponsored bills show us whether he or she is likely to support proposed legislation on a particular issue? The answer is yes, probably. Congress.gov has a wealth of information on voting history and bill sponsorship, and Google can be a great help in digging up information about your elected officials.

What does the elected official talk about? Reading press releases and transcripts of speeches given in Congress can offer great insight as to what issues and values are important to the Senator or Representative. And, again, knowing what is important to those you are trying to influence is vitally important in tailoring your message.

***Top Ten Tips for Persuasive and Effective Meetings with Congress***

Now that you've gotten the meeting set up and done your homework, it is time to head to the Hill and execute the meeting. Professional lobbyists and Capitol Hill staffers with combined decades of experience were surveyed and asked to rate a list of tips for effective Congressional meetings on a scale of 1 to 10 based on how important or useful each tip is. The following are the top ten and the average score for each. The entire list of 18 tips, all of which are useful, is provided in an appendix to this document. Without further ado, here's what the pros say:

1. If an opportunity presents itself, ask directly for the desired action (e.g. cosponsor the bill, sign a letter to the Chairman, etc.) 9.9

2. If they ask for additional information/documentation/anything you cannot provide on the spot, be sure to make note of it and provide it or refer our legislative team to them after the meeting. 9.5

3. Get the name/card of the person you met with. Promise to follow-up and actually do it, even if to just say thanks again for meeting with us on this important issue. 9.5

4. Use anecdotes and points tailored to convince, depending on Political persuasion of an office. 9.4

5. Make it clear that you are a constituent from the state/district that the office represents. 9.4

6. Know the issues. 9.4

7. Thank members and staff for their time/for meeting with you. 9.1

8. Share your personal story: you are the expert on being a blind student and have information that they need to make effective and desired laws. 9.1

9. Know when enough is enough. We all enjoy sharing our story, but there is no need to illustrate the same point three and four times if they clearly understand. Time is limited. Be concise. 9.1

10. Steer the direction of the conversation and be sure to cover the issues. Senator X may be perfectly happy to discuss the ice cream shop near where you both grew up, make small talk, take a photo, and call it a day. 8.9

**MODUAL III: Bringing it Home**

***Keeping the Ball Rolling***

It is very tempting to go up to the Hill, have your meeting, make a strong case for legislation, and then go home and wait to see the result. This very rarely works. Getting the legislative ball across the goal line takes persistent effort and ongoing advocacy. This is where many fall down. Don't let it happen to you!

Now that you have a contact in the office who knows you and knows about your issue, you need to keep in touch. Again, these people are very busy and a flood of correspondence is generally unwelcome and counterproductive. But you must judiciously keep the conversation going. Shortly after the meeting, you should email the staffer(s) you met with and thank them again for meeting with you. Express your willingness to answer any questions or provide any information they might require related to your issue or relevant legislation. And if they promised to do something in your meeting, such as talk to their boss about a bill or sign on as a cosponsor, politely remind them of that and indicate that you look forward to hearing what the Senator thinks or seeing the Congressman on the bill. Then, stay in contact. If a bill impacting your issue is coming to the elected officials committee or the floor for a vote, drop a quick concise note indicating whether you support the legislation and why. If a Representative indicated that he or she would sign onto a bill as a cosponsor but you don't see their name added after a period of a few weeks, follow up and ask if they still intend to sign on.

Create relationships with the staffers with whom you meet. That way, not only will they remember you and the issues you talked about, but they will also know who you are if something unrelated comes up that you care about. And we all know that people pay attention to emails from people they know and like to a far greater degree than emails from strangers. You don't want the minute you need something to be the first time the office and staffer hear from you. Build and maintain the relationship and you will be able to capitalize on opportunities and access information that you would otherwise miss out on.

***Top Tips for Legislative Advocacy outside of Washington DC***

Whether or not you traveled to DC and met with your elected officials, there are things that can be done from anywhere to attempt to influence legislative outcomes. Frankly, none of these approaches are as effective as sitting down face to face with the Senator or Representative, or his or her staff. But they can absolutely produce results if executed wisely. In the same survey of legislative professionals referenced above, respondents were asked to rate the effectiveness of various methods of legislative advocacy conducted from outside Washington on a scale of 1 to 10. The following approaches were rated higher than 5, and those that were rated lower, being generally deemed ineffective, are not included in this document. Here's what they thought:

1. Enlist supportive high profile figures such as University Presidents, state legislators or high ranking state officials to get in the ear of your Senator/Representative on your issues. 8.6

2. Try to meet with the Member in their state/district office or at a community forum/town hall event. 8.5

3. Respond to coordinated grassroots call/email campaigns to show strength in numbers. 8.1

4. Publish op-eds, post on industry/advocacy blogs/publications, or engage political outlets on TV/radio to raise the public profile of your issue. 7.3

5. Send a personalized letter/email to your Senator/Representative's office detailing how an issue impacted you personally and what you'd like them to do to help. 6.6

6. Call your Senator/Representative's office and leave a comment about an issue. 5.5

Note: attempting to influence legislators via social media outlets like Facebook and Twitter is absent from this list. Why is this? Isn't social media a critical component of our public discourse? Yes and no. Social media is used primarily to communicate messages to constituents and promote the public image of elected officials, not to gather input or gauge the policy preferences of constituents. Of course, an enormous uproar on Facebook around an issue or bill will be noticed and have some impact. But the sheer volume of posts, likes, tweets, retweets and the like required for that to happen is of a magnitude that only an extraordinarily small number of issues can spark. The bar, while still high, is much lower for phone calls, letters, and emails. Up and down the line, lobbying and legislative professionals agree: social media is not an effective method of influencing legislation. Clicking the "like" button requires virtually no effort, and everybody knows that. Taking the time to make a phone call, write a letter, or get on a plane and go to Washington demonstrates that something is important. So, go ahead, engage on social media. But don't let that be all you do. If you do, you are ignoring the most effective tools in your advocacy toolbox in favor of the easiest ones.

**Appendix A**

Here are all of the 18 tips offered and rated by our team of professional lobbyists and Hill staffers in order of their perceived importance and usefulness:

1. If an opportunity presents itself, ask directly for the desired action (e.g. cosponsor the bill, sign a letter to the Chairman, etc.) 9.9
2. Get the name/card of the person you met with. Promise to follow-up and actually do it, even if to just say thanks again for meeting with us on this important issue. 9.5
3. If they ask for additional information/documentation/anything you cannot provide on the spot, be sure to make note of it and provide it or refer our legislative team to them after the meeting. 9.5
4. Use anecdotes and points tailored to convince, depending on Political persuasion of an office. 9.4
5. Make it clear that you are a constituent from the state/district that the office represents. 9.4
6. Know the issues. 9.4
7. Thank members and staff for their time/for meeting with you. 9.1
8. Share your personal story: you are the expert on being a blind student and have information that they need to make effective and desired laws. 9.1
9. Know when enough is enough. We all enjoy sharing our story, but there is no need to illustrate the same point three and four times if they clearly understand. Time is limited. Be concise. 9.1
10. Steer the direction of the conversation and be sure to cover the issues. Senator X may be perfectly happy to discuss the ice cream shop near where you both grew up, make small talk, take a photo, and call it a day. 8.9
11. Be polite, confident, and respectful, but do not be intimidated. They are all just people, too. 8.8
12. Listen, analyze, and observe reactions carefully so you can adjust if needed. Consider these questions: Are they interested? Clearly opposed? Bored? 8.5
13. Do not say something that you are unsure about. It's better to admit you are uncertain, rather than answer a question incorrectly. 8.5
14. Do not talk smack about other Members/staff. Keep in mind that these people work together and have relationships among offices. 8.3
15. Know the committee assignments of the Members and focus on where they can help you. 8.0
16. Dress professionally. 7.8
17. Remember that staff meetings can be just as impactful as Member meetings. 7.4
18. Do not expect an immediate commitment or firm answer on your ask. This is rare. 6.9