

North Carolina Assisted Living Association

Grassroots Advocacy Toolkit

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Contacts

As different as is every political issue, so is each legislator. To address the diversity of legislators and issues, some basic methods of *contact* work well in most advocacy efforts. There are several types of contracts: site visits and tours, personal visits, letter writing, telephone calls and in some cases, e-mail contacts. All of these types of contacts can be effective and persuasive means to gaining legislators' support.

Personal Contacts

Personal contacts—or visits—get a lawmaker's attention. No contact can more successfully convey the importance of an issue than the personal visit. Legislators know that time is as limited for constituents as it is for them and when a constituent takes the time and trouble to travel to make a personal visit, or to arrange a site visit and tour, the issue is obviously an important one. Personal contacts get a lawmaker's attention.

Site Visit and Tour

The most effective personal visit is one scheduled at your assisted living community. Such an event accomplishes many things, but two important goals in particular. First, it gives the lawmaker quality time with registered voters. Second, it gives the host to present his or her message in an environment he or she controls.

The elements of the Site Visit and Tour should include an opportunity to show your community's best; time for the lawmaker to meet and greet residents and their families; an opportunity for the lawmaker to visit with staff and caretakers; and a one-on-one visit with the host. Schedule a tour of your community when the lawmaker is at home in the district. Steps for an effective visit and tour include:

1. A written invitation to the lawmaker (at least one month in advance).
2. Determine if the event will involve a meal or a reception. Consider hosting a fund raising reception.
3. Meet with staff to plan the visit—should not take more than one hour if a meal or reception is not included; two hours if event includes a meal or reception. Write out a specific schedule and stick to it. In addition to the host, one person should “take charge” of the event and, in particular, keeping to the schedule.

4. Address every detail, including where the guest is to park. Have a point person assigned to escort the lawmaker from the moment he or she arrives until the guest is escorted back to the car.
5. Determine which areas of community to highlight.
6. Consider message to convey – what do you want to request while the lawmaker is visiting?
7. Invite families of residents to meet with lawmaker during the visit (at least three weeks after visit is confirmed).
8. Notify local media of the upcoming visit. Arrange for a photographer to be on site.
9. Write up a press release for the local media's use and include the photographs. Be sure to write a report about the event for the community's newsletter and give your staff credit for making the event a success.
10. After the event, be sure to thank the lawmaker for visiting. Reinforce the points you tried to make. Include clippings from the local media coverage and from your internal newsletter's coverage.

NCALA can be an invaluable asset to help in planning a site visit and tour. Of all the types of personal contacts, the site visit and tour is the most effective and memorable for the lawmaker. Elected officials look for opportunities to meet with registered voters. Your site visit could be *the* opportunity for the elected official to meet with seniors, their families and your staff—all important elements of the district.

Visit the Lawmaker's Office

The keys to an effective personal visit with a lawmaker are no different from an effective business meeting. Be polite, professional, concise and genuine in conveying your message. Some basics to conducting effective visits are listed below.

1. Visit with elected officials at their offices—be sure to schedule an appointment. This will help to establish yourself as a district contact for the lawmaker.
2. Whenever you meet with the elected official, always introduce yourself—even at the second or third meetings. Do not put the lawmaker in the awkward position of having to ask your name.
3. Get to business quickly, but politely. Explain why you are there. Do engage in the appropriate exchanges about news “back home,” but return to the point of your visit quickly.
4. Keep your message short, simple and direct.

5. Know your issue and be prepared. Whether you call, write or personally visit a lawmaker, do your research. Prepare what you will say. Lawmakers will heed a presentation that is well prepared and points that are thoughtfully presented. Lawmakers will view an ill prepared presentation that as a waste of time and resent the imposition.
6. Answer questions honestly. If you don't know an answer, say so, but offer to follow up with the information sought. Never lie or mislead.
7. Three fundamental rules of advocacy are: always tell the truth; always tell the truth; and, finally, always tell the truth. Never lie or mislead. As in business, if one is caught in a lie, one loses the trust of valued colleagues and friends and will find resuming those relationships difficult, if not impossible.
8. Provide the lawmaker with simple and succinct background materials to reinforce your points. One or two page briefing papers are best and will be considered. Long treatises rarely are read. Be sure to leave identifying information on the briefing papers along with your business card and offer to provide additional information if the lawmaker or the staff need it.
9. Follow up with the lawmaker after the meeting. A thank you note for the visit is a nice touch and can be used as an opportunity to restate the points of your meeting. Similar notes to any staff who attended the visit also "score points;" however, be sure to send different letters to folks in the same office. They do "compare notes."
10. If an elected official is unavailable to talk when you telephone, ask visit to speak with any staff you met previously. The staff will convey whatever message you have for the lawmaker and the chat will give you a good opportunity to follow up.

Telephone Contacts

Telephone calls should be treated as seriously as are personal visits. One should be as prepared for a phone chat as he or she is for a personal or site visit. While the lawmaker may not see you "face-to-face," he or she will hear you and pick up messages from every little cue—the tone of your voice; the speed of your speech; whether or not the call is dropped; even from the time of day of your call. Use common sense—be aware of how you sound and how you use the telephone.

1. Use a phone with a strong signal—whether a "land line" phone or strong cell signal—when placing the call. If calling from a cell phone and the connection is lost, reconnecting with the lawmaker is often impossible and creates a frustrating experience for everyone involved. The lawmaker will remember you—but not necessarily in a favorable light.
2. When calling legislators, remember that their time is valuable. Always introduce yourself first and then get down to business.
3. Always use proper phone etiquette. No matter how heated a discussion becomes, never raise your voice or become rude. Your job is to make your message heard, not challenge or debate the lawmaker.

4. Much has been written in the popular press about cell phone etiquette. Simple rules apply with the use of any phone—mind your manners! Be as aware of where you are making a call as to whom you are calling and how the background noise reflects on the conversation.
5. Always leave complete information when leaving messages for elected officials.
6. When voicing a concern about a particular bill, consider calling elected officials' key staff members. Staff members appreciate knowing about the information you provide elected officials since they may be responsible for tallying public support or opposition on an issue.

Letter Writing

See also "Sample Letter" in next section.

Writing letters makes efficient use of time. Letters get through even when telephone calls are not returned. Letters also provide a permanent record of your position and concerns.

1. Draft your own letters. Do not use form letters. Elected officials tend to ignore form letters. Nothing carries the impact of an original letter, especially when a legislator receives several on the same issue.
2. Letters should be dignified, respectful and sincere.
3. Thank elected officials for doing good things. Offer constructive criticism when you disagree with them. Never criticize without offering a reason for disagreeing and a better alternative.
4. Keep to one issue in a letter.
5. Avoid writing letters that are more than one page long.
6. Specifically state your points. Be logical and positive.
7. State clearly how the issue will affect the legislator's constituents and the larger community.
8. Write on your own behalf. Do not say that you are writing because the NC Assisted Living Association or anyone else asked you to write. State that you are writing because you are concerned about the effect that this issue will have on your community.
9. Request a specific action:
 - a. Ask the elected official to support or oppose a bill;
 - b. Ask the elected official to introduce a bill on the subject;
 - c. Ask the elected official to "sign on" to an existing bill;
 - d. Ask the elected official to object to or to support a rule; or
 - e. Ask the elected official to discuss the matter with an Agency Head or the governor.
10. Request and answer. You have told the elected official where you stand, now ask to be told where he or she stands.

11. When signing a letter, always write your name, address, and telephone number below your signature to be sure that it appears elsewhere on the letter. Envelopes are often discarded.
12. A legibly handwritten letter sometimes reinforces the depth of the writer's convictions.
13. Always thank the elected official for considering your thoughts.
14. If the matter about which you are writing is time-sensitive, send the letter by express mail or second-day air delivery. Do not fax materials to the lawmaker unless you are invited to do so and assured that the machine is nearby. Multiple users sometimes share fax machines and a faxed letter might not get to its destination, let alone get there on time.

E-mail Messages

As in private business, government has become dependent upon electronic mail. E-mail, like faxes, pagers, wireless phones and PDAs, has made doing business more expedient. However, these communications tools have complicated accessibility to elected officials. Lawmakers and their staff are quite literally drowning in communications from staff, fellow lawmakers, constituents and lobbyists.

Lawmakers' staff exhaust many hours each day wading through the variety of communications to determine which message to put before the lawmaker first. To manage this volume, staff persons perform a triage procedure on the hundreds of emails they receive each day. First, the messages must survive the network-based filters that automatically reject certain "spam" messages and pornography. Second, staff will delete what they can determine to be spam that survived the first filters. Then, the staff sort through emails from other lawmakers or the Governor. Next, they try to sort through communications from constituents. Finally, lobbyists' emails are given the "once over." An e-mail must survive at least four layers of scrutiny before it is even considered. So, what appears to be a quick, easy and cheap communication may be the least effective communication tool because it may not receive attention.

If you must use e-mail, remember:

1. Send an e-mail when the receiver expects to receive one from you. E-mail is most effectively used when a constituent has established a relationship with a lawmaker who expects to receive follow up information. The lawmaker's staff can be alerted to expect the message and will look for it instead of deleting it. Even still, expect your message to be subject to the triage procedures described above and consider that when putting information in the subject line.
2. You never can be certain about who is reading your e-mail. Consequently, never treat e-mail as a private correspondence and be mindful of what you write.

3. Do not send an e-mail to a lawmaker—or for that matter, anyone—when you are angry or upset and have not clearly thought out the consequences of what you say. Many people use e-mail because it is real-time and enables an immediate reaction to the most recent developments in an issue. Such immediacy can be both good and bad. Please carefully consider your message before sending it.
4. Use the same format and rules that you would when writing a letter. Make sure that your grammar and spelling are correct.
5. Consider sending a letter or making a phone call in addition to sending the e-mail. Writing a letter takes more time and trouble, but is more permanent and more difficult to ignore. A thoughtful, well-written letter—not a form letter—is the best means to that end. There is no substitute.
6. Always remember to include your mailing address and phone number. Your e-mail address is not sufficient. Staff often looks for a zip code when conducting triage on e-mail correspondence. If the zip code of the writer is not one in the lawmaker’s district, the e-mail will most likely be deleted, unless the recipient is expecting the message.
7. E-mail communication is most effective if it is done at the invitation of the recipient and if the communication is given the same care as that for written communication. In other words, send e-mail if an elected official asks you to and then be careful about what you say and how you say it. You never can be sure about who is reading—and deleting—the e-mail.

Follow Up

See also “Sample Thank You Note” in next section.

Follow up is an extremely important step in communicating with lawmakers. Keep track of an issue’s progress by reading the newspapers, by keeping in touch with NCALA, and by keeping in touch with your elected officials. Follow up afterwards and consider the following:

1. Thank your elected officials for considering your concerns and, especially, acting in a manner that reflect your positions.
2. Thank your elected officials for considering your concerns, even if they voted differently from your position. Remember, they might not have helped you today, but they might help you tomorrow.
3. Be certain to thank staff.
4. Find ways to give elected officials credit for their good work, in your community’s newsletter or newspaper, or perhaps by hosting a reception or “meet and greet” during the recess between legislative sessions.

Support them financially, through individual contributions and, most importantly, by supporting NCALA’s PAC.

How to Write Your Elected Officials

SAMPLE LETTER

Date

Address legislators as “The Honorable.”
Send letters to their legislative address or their preferred address if the legislature is not in session.

Use Proper Salutation

State who you are and why you are writing. Include the bill number if you are writing about a specific bill.

Tell him or her what you want and then elaborate on why the action is important to you.

Cite examples when possible.

Reiterate your points.

Thank the elected official.

Include your name address and phone number.

October 30, 2004

The Honorable Jane Q. Citizen
North Carolina House of Representatives
999 Legislative Office Building
Raleigh, North Carolina 22222

Dear Representative Citizen:

I manage an Assisted Living Community in your district. With my staff of 100, I look after 450 senior citizens in varying ranges of health. I write now to ask your assistance to help us maintain the high quality of life we provide for them.

When you begin work on the North Carolina Budget in 2005, please increase the level of funding for the State/County Special Assistance (SA) funds that benefit frail elderly North Carolinians who receive Medicaid. SA enables frail elderly North Carolinians to reside in Assisted Living – high quality communities that provide modern, clean and stimulating environments. However, for each Medicaid resident, Assisted Living Communities lose about \$4 per. As the costs of food and fuel escalate to record levels, caring for greater populations of Medicaid residents becomes more difficult.

Thank you very much for considering my thoughts on increasing the SA rate.

Sincerely,

Jacqueline Conetoe, First Rate Assisted Living
111 High Street
Anytown, North Carolina 22222
(910) 555-1212

Follow Up with Your Elected Officials

SAMPLE THANK YOU NOTE

Date

Address legislators as “The Honorable”

Use Proper Salutation

Thank the elected official for the visit, his or her action on something, support, etc. up front. Make sure you note when your meeting took place, what bill or resolution you are writing about and/or what the issue is. Note the impact of the issue on North Carolina, just to reiterate your position.

Say thank you again before closing.

Include your name, address and phone number

October 30, 2004

The Honorable Jane Q. Citizen
North Carolina House of Representatives
Room 999 Legislative Office Building
Raleigh North Carolina 22222

Dear Representative Citizen:

Please accept my sincere thanks for your tireless support to increase the State County Special Assistance Rate (SA) in the state budget bill, HB 1414. Because of your efforts, thousands of frail seniors will maintain their high quality of life in Assisted Living Communities in your district and elsewhere in North Carolina. Although the increase is not quite at the level we discussed, we are grateful that any increase survived the give-and-take involved in the lengthy and complex budget negotiations. We know North Carolina had many competing needs that you worked to address and are grateful that you managed to include some increase for SA.

I look forward to continue to working with in the future. Please contact me if I can assist you in any way – particularly in issues involving Senior Citizens.

Thank you again for your assistance.

Sincerely,

Jacqueline Conetoe, First Rate Assisted Living
111 High Street
Anytown, North Carolina 22222
(910) 555-1212