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**Guide to Intersegmental Legislative Advocacy**

*Fall 2011 – Spring 2012*

**Advocating a Common Message**

The Intersegmental Committee of Academic Senates (ICAS) believes that advocacy for higher education by all three faculties – community college, CSU, and UC – together is more effective than each system advocating separately. Each system has different funding mechanisms and issues unique to it, but all three segments can find common ground on advocating for student access and higher education’s role in returning the economy of California to the robust and vibrant state it once was. Higher education faculty form a cohesive unit when educating legislators and their staff about the state of postsecondary education, improving student preparedness and success, and ultimately workers for the state of California. ICAS recommends that faculty join with colleagues across the segments when visiting Sacramento or local district offices to convey the message that the professoriate is united in its goals to improve opportunities for all citizens to attend public colleges and universities.

**Grassroots Advocacy: Educating on the Local Level**

Effective grassroots education can take place literally in your own backyard. In fact, lobbying is essential to affect statewide decisions made at the Capitol. It is important to note that while votes on critical pieces of legislation and state budget issues are taking place in Sacramento, legislators have in mind their local constituents — including you and your intersegmental colleagues — when casting their votes. Every legislator understands that maintaining support from the public is a top priority, otherwise he or she may not return for another term in office.

The effectiveness and influence of CCC, CSU and UC faculty, along with other advocacy organizations, depend directly upon the personal and political relationships of individuals and groups in a legislator's district. Faculty are viewed by many legislators as especially important because they are "opinion leaders" in the community. Such influence can be developed through persistence, creativity, and interaction between intersegmental faculty and members of the state Legislature. If this interaction does not occur, then there is no significant pressure for legislators to address the real needs of California’s students, faculty, and staff. Policymakers are then left to come to their own conclusions. These may include misperceptions and simplistic solutions that eventually will devastate public, higher education, and ultimately, the state and its economic future.

For effective grassroots advocacy, concerned individuals must be consistent and persistent in applying the simple — yet powerful — principles of political influence summarized in the following pages. Committed involvement, expressed through campus visits, district office meetings, and visits to the state Capitol make a difference. The key is developing informal, reliable relationships — in your own backyard — before a major political conflict or crisis occurs. Once an atmosphere of trust has been established, your legislator will welcome your opinions and suggestions — anytime.

**Identify Your Local Legislators**

Don't be embarrassed if you don't know your local Assembly and Senate members. With redistricting and the imposition of term limits in recent years, the faces and names have changed dramatically. For a list of legislators in your area – please visit the ICAS advocacy page at <http://icas-ca.org/advocacy-materials>. Download the 2011 legislator chart, which can be used to assist with coordinating local faculty advocacy efforts. It groups together community colleges, CSU and UC campuses that share the same legislative representatives. It also contains the names of the local campus senate presidents/chairs.

In addition to the legislator themselves, the legislator's District Office and Capitol staff can be very helpful — or, if approached incorrectly, very harmful. Legislators depend almost entirely on their staffs for briefings on constituent and district concerns, as well as for in-depth analyses on major issues. Legislators invariably consult with trusted staff members before taking a position or casting a vote on a particular bill or budget item. Get to know your legislator's District Office staff — on a first name basis, if possible. Offer your assistance, perhaps in gathering information about the CSUs, UCs and CCCs in your area.

**Steps for Setting Up Intersegmental Faculty District Office Visits**

*Research the Background of Your Legislators*

Researching the background of the legislator you are trying to influence is a crucial step for grassroots lobbying. Additionally, understanding their personality as well as past positions on legislative and budget issues will assist you in effectively delivering your message and requesting a legislator's assistance. The more you know about your representative's background, the more effective your interactions will be, and it will be easier to develop a strong working relationship.

*Preparing for a District Office Visit with your Intersegmental Colleagues*

1. Establish a Goal or Purpose — It is important to focus on a specific purpose for your visit before showing up on a legislator's doorstep. Once a clear goal has been established with your intersegmental colleagues, then the steps needed to accomplish the goal can be planned.
2. Understand the Member's Realm of Influence — Be certain you clearly understand the role your local legislator can play in supporting the progress of your issues. Is he or she a member of an appropriate policy or fiscal committee and/or subcommittee in the Legislature? Is your visit immediately preceding a relevant floor vote in the Assembly or Senate? Is your legislator part of the established legislative leadership? Clearly identify how a legislator's influence will help you and your intersegmental colleagues on a particular issue.
3. Identify the Intersegmental Colleagues Attending— It is important to limit the number of people meeting with your legislator. Select a maximum of three to five individuals. Without a strict limit on the group size, your legislative representative will likely give a speech to your group instead of participating in give-and-take discussion. Whenever possible, consider including at least one student in your group.
4. Scheduling — When the Legislature is in session, the legislative schedule generally permits legislators to be in their districts each Friday and during holidays. Call the district office at least a week in advance to make an appointment with your legislator. Effective meetings may be as long as an hour or as brief as 15 minutes, depending upon your agenda — or the legislator's — and pressing time limitations.

When you call to schedule your visit, you normally will be asked (1) the topic of your meeting and (2) the number of people attending. Ideally, meet directly with the legislator. However, this may not be feasible. In such cases, identify the staff member who is most appropriate for your visit (you don't want to meet with an intern who will have little background in, or influence with, the issues you will be discussing). Generally speaking, if your legislator is not available, request a visit with either (1) the Chief of Staff or (2) the staff member who works on higher education issues.

**Prior to Your Meeting**

For guidance in preparing for your meeting, refer to the **Do's and Don'ts of Lobbying** at the end of this document. Additionally, be sure to:

1. Know Your Issue — If you intend to discuss specific legislation or budget issues, be sure you possess the most up-to-date information available, including bill numbers, their current legislative status, copies of the amended version(s), any committee analy­ses, and vote counts in committee and/or on the floor. ICAS or the Academic Senates often have official positions on various legislative topics and academic and professional matters in higher education along with research or data that can help you feel confident and knowledgeable.
2. No matter what the issue is, be certain to provide a one to two-page synopsis so the legislator and/or staff member can easily assimilate your information. Don't be con­cerned if during the meeting questions arise that you are unable to answer. Simply state that you don't have a response at the moment, but you will provide the requested information in a follow-up letter.
3. Identify Assignments for Attendees — Break down your issue into sub-issues, and assign each sub-topic to specific faculty attending the meeting. This will help in delegating any research that may be needed, and will also prevent one person from dominating discussions. Your intersegmental lobbying group should meet at least once, several days prior to the scheduled meeting, to review roles and to determine if additional informa­tion is necessary.
4. Role Play — Prior to your scheduled meeting, it's helpful to "role play" your visit. Identify someone to be the legislator and/or staff member and conduct a "mock" meet­ing. This will help you to "trouble shoot" problems before they occur, as well as to prepare for any unanticipated questions or arguments that may arise. Conduct your role-playing based on the background research you've done on the legislator, regarding both their voting record and personality. (And if it goes badly at first — remember, this is just a trial run. Try again.)

**The Day of the Meeting**

Again, refer to the **Do's and Don'ts of Lobbying** to prepare for your meeting. Pay particular attention to the following points:

1. Be Specific and Get a Commitment —When lobbying on a particular issue, be cer­tain that your presentation is specific (1) when explaining the issue, and (2) in request­ing assistance from the legislator. If you want your legislator to take a position on a budget item or a bill, then seek a commitment from them before you leave. If any other formal action is needed, then find out if your representative is willing to assist you.
2. Obviously, when a meeting is organized simply to develop a long-term working rela­tionship then a specific commitment is not needed. In fact, as mentioned previously, such interactions are essential in establishing a framework for future requests. Legisla­tors are always being asked to do something on behalf of constituents or special interest groups, and often are appreciative when the focus is on establishing a dialogue and reliable working relationship.
3. Ask How You Might Help Your Legislator — There may be times when your legisla­tor needs your assistance. Learn what the legislator's priorities are, and determine if you or your campus can help.
4. Become a Resource — Ask if there is any information you can provide to either assist your legislator in achieving his or her goals, or to gain their support on the issue you're lobbying for. Whatever information is requested, be certain to follow-up on time and accurately. Also, use your representative as a resource; ask for suggestions on how to achieve your goals.
5. Leave Something Tangible and Debrief — Leave something to remind a legislator or staff member of your visit – like a copy of the ICAS Advocacy Brochure (send requests for copies to [info@asccc.org](mailto:info@asccc.org)). Also be sure to bring business cards and a current phone number and mailing address. After your meeting, sit down with the members of your group and review (1) how the meeting went, (2) what things you would do differently, (3) what commitments were made by the mem­ber, and (4) what follow-up is needed by the group (at a minimum, follow-up should include a thank you letter).

**Other Important Points to Remember**

* Keep in touch with local legislators throughout the year. In addition to making at least two or three District Office visits, assure legislative representatives that you are always available as an information source — and are keeping abreast of the activities and issues before the Legislature — by providing monthly contact through letters, newsletters, or bulletins.
* Letters are an especially important source of information for legislators. Each legislator "counts" mail on issues they are considering, and will many times "vote with the district" on the position articulated in letters received. Legislators also pull quotes from constituent letters when preparing to speak on a legislative issue.
* Telephone contacts should be limited to emergency situations when there is no other means of contacting a legislator in time to influence his or her decision.
* Local academic senate presidents may choose to write letters to representatives on behalf of the faculty when the senate decides to formally take a position on a topic.

**The Do's and Don'ts of Lobbying**

The Basics:

* Be Prepared — Do your homework. Legislators have relatively small staffs, and they depend upon lobbyists and constituents for much of their information. Providing legislators with organized, useful, clear and concise information will assist them in making informed decisions.
* Be Honest — Your word and credibility are your bond, and your integrity will be judged by your honesty. There are two key rules to remember:

1. Do not hesitate to say: "I don't know, but I can get that information for you."
2. Be Brief — State your views concisely and clearly.

* Don’t waste the most valuable commodity a legislator (or anybody else) has — time. Be sensitive to time constraints; some legislators may have only a few minutes to meet with you, so be prepared and be succinct.
* Know the basics, but don't worry that you're not an expert (you're not expected to be).
* Give anecdotes and specific examples pertinent to the UCs, CSUs and CCCs regarding the effects of budget cuts and/or legislation on students and faculty.
* Anticipate tough Questions, such as "If we don't cut schools, where do you think we should cut?" Often stating a simple "I don't know" followed by an alternative solution (such as raising revenues) will prevent embarrassing political situations.
* Do not overkill. Recognize when you've gotten what you came for, or as much as you'll get. A legislator will avoid you in the future if you ramble, or otherwise waste his/her time. Be an active listener; be sensitive when a legislator wants to talk.
* Be Respectful and Polite — Always address legislators properly (Assemblyman/woman or Senator). During discussions, if you disagree, say so in a straightforward way. But keep the argument separate from the arguee. Focus your arguments on facts and reasons behind disagreements — not personalities. If a legislator currently does not support you on an issue, accept that fact, yet continue lobbying through district visits and letters. Always remember that the same legislator could be your ally next time.

**More Tips:**

* Breathe — Just take a few deep breaths before meetings and during stressful situations. It will help you to relax and collect your thoughts.
* Be Reliable — When your intersegmental group makes an appointment with a legislator, keep it. Be punctual. If you need to cancel an appointment, call the legislator's office as soon as you know. When you tell a member you will send information, do so promptly.
* Select a Spokesperson and Assign Roles — Appoint a member of your group to introduce everyone, and begin the conversation. Plan what each member of the group will discuss, and role-play your parts prior to each meeting. Give everyone in the group an opportunity to speak. It's also important for each person in your group to take notes for later debriefing.
* Don't Be Timid or Awestruck — These are your elected representatives, who also happen to be human. As a constituent, you shouldn't allow a legislator to dominate the conversation, or give speeches. Courteously, but forcefully, make your points and ask your questions. Try to get the member "back on point."
* End Your Visit With a Question — Ask how they'll vote on an issue (something many constituents forget to do) or ask if you can send additional information. If the member hasn't taken a position on your issue yet, offer to respond to any concerns he/she may have with follow-up information.
* Leave Something Tangible With Your Legislator — A fact sheet or a copy of a bill (if applicable) — anything that visually will remind your legislator of your visit and your position on an issue.
* Debrief and Follow-Up — Immediately following the meeting, members of your group should review their notes to be certain everyone knows (1) what was said; (2) what was promised by all parties; and (3) what next steps are needed to gain (or maintain) the member's support. Additionally, honestly evaluate the group's performance before your next meeting, to identify your collective strengths and weaknesses. Your efforts should then be coordinated so that any promises made (ie. sending more information, attending a district office meeting, etc.) are fulfilled in a timely manner. Also, be certain to communicate with your local senate president about your meetings with representatives. Just a quick email should suffice.
* Thank You Letter — Be sure to send a letter of thanks that (1) expresses your appreciation for the visit; (2) summarizes the purpose of the visit; and (3) reiterates the action you want taken by the legislator. The letter should be handwritten or typed (no photocopied form letters!), and mailed within a few days of the meeting.

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