FACES & VOICES OF RECOVERY

ADVOCATE. ACT. ADVANCE.

ADVOCACY TOOLKIT

TEN TIPS FOR RELATIONSHIP BUILDING

Long term, effective advocacy is built on positive, trusting, strategic relationships with elected officials and their staff, the media and your own constituents. These tips specifically relate to building relationships with elected officials and their staff.

1). DO YOUR HOMEWORK. Read up on your legislators, their pet issues and the critical issues in their last election. Know what local issues are important to THEM and how recovery relates to THEIR agenda.

2). FIND SOMETHING IN COMMON. Make the most of small talk so you have a common platform from which to move to your agenda. When you meet with them in their office, look at their photos; know in advance if you went to the same school, attend the same church, or share the same hobby. While you do not want to waste valuable meeting time chatting about these issues, small talk before or after a meeting or during a tour of a local facility helps put a legislator or staff person at ease and begins to build common bonds that develop relationships.

3). INVITE THE LEGISLATOR AND/OR THEIR STAFF TO SEE RECOVERY IN ACTION. Localize and humanize recovery by inviting a legislator and/or their staff to see recovery in action. Invite them to join you at a local Rally for Recovery event, your Recovery Community Center, recovery residence or a recovery walk/run in your community. The longer you can spend down time with them, the more likely they are to find out what a likeable person you are. This is the best form of stigma reduction in the world.

4). PROVIDE ACCURATE, TIMELY INFORMATION ON YOUR AGENDA, REGULARLY, NOT JUST WHEN THE LEGISLATURE IS IN SESSION. While it is critical to send brief, accurate and timely information on your advocacy issues to legislators and particularly their staff when the legislature is in session, it is critical that you continue to do so regularly so that you build a reputation as an industry expert and as a go-to person on recovery related issues.

5). PERSONALIZE RECOVERY ISSUES AS THEY RELATE TO INFLUENTIALS BACK HOME AND PROVIDE LOCAL CONTEXT. Some legislators may not have recovery-related issues on their agenda. How do you make "your" issue "their" issue? Figure out who or what is important to them and find out how recovery might be tailored to the legislator's pet issue or to key influential people in their life. Go to opensecrets.org for a list of top donors to Congressional candidates. For example, if you learn that a particular member votes with the Chamber of Commerce 98% of the time; send them information about the fact that over 60% of people with alcohol and drug problems are employed full time. If there are newspaper articles and news reports about kids who have died after driving drunk after their high school prom use those stories as lead in to your advocacy agenda.

6). CREATE OPPORTUNITIES FOR LEGISLATORS/STAFF TO BE SEEN AT COMMUNITY EVENTS.
Remember relationships are two way streets – legislators need to get reelected and need to get good media and photo ops to enhance their reelection efforts. Be mindful of this and invite them to well-attended events, especially during the electoral season. It will not go unappreciated.

7). PARTICIPATE IN POLITICAL EVENTS. You do not have to be rich; just clever with a good list of contacts. Legislators would much rather you raise them $500 with 10 $50 checks from other people than write a $500 personal check because they prefer to get ten names for their database instead of one. Raise money, attend fundraising events, host events with other people, but do not pretend that other people fundraise so you do not have to.

8). MEET WITH YOUR MEMBERS AT HOME AND IN WASHINGTON. Relationship building lays the groundwork for meetings.

9). IF THE LEGISLATOR/STAFF IS SUPPORTIVE OF RECOVERY, CULTIVATE THEM INTO A CHAMPION.
If a legislator appears to be supportive of recovery, it is up to you to build and nurture this relationship. Offer to help the legislator initiate a special recovery task force or commission at the local or state level. Send information on major successes and major outcomes of your coalition to the legislator and staff – when you have events, invite the staff and legislator to them. Reward them by giving them awards once they help fulfill your organization's mission. Always say thank you. Say thank you again.

10) ARTICULATE THE LONG TERM VISION OF YOUR ORGANIZATION TO THE LEGISLATOR SO THEY BECOME INVESTED IN AN EXCITING VISIONARY GOAL. Once legislators know that you have given thought to a long term plan with an exciting vision, they will be more willing to help you and can help strategically link you with other community partners to help you realize your long term goals. You want them to invest in your long term vision so that when they hear about new sources of funding or new unique community partners, your organization, project or program pops into their mind.

CONDUCTING A MEETING WITH YOUR ELECTED OFFICIALS

Meeting with a legislator can be a critical part of an overall campaign. Here are some guidelines:

1). RESEARCH YOUR LEGISLATOR. Learn something about his or her personal, professional and legislative concerns – as well as your district. The *Almanac of American Politics* and *Politics in America* are useful resources in addition to online research.

2). TAKE SEVERAL PEOPLE. A diverse group—particularly people directly affected by a particular policy—always conveys more power than one person. This also can help overcome any resistance or fear your organization's members may feel when lobbying and advocating. But be sure to organize your presentation. And don't overwhelm and possibly alienate a policymaker by bringing too many people, unless of course that is part of your strategy.

3). MAKE SURE YOU'RE MEETING THE RIGHT PERSON. Ideally, talk directly to the legislator. If that's not possible, make sure you talk with the staff person assigned to your issue. Also make sure to touch base with the member's chief of staff or administrative assistant beforehand. This person often serves as the member's political eyes and ears by informing a legislator of issues that are especially sensitive in the district. In general, a representative's district staff is best used to get access to the member, or to solve local problems. Policy concerns should be taken directly to the DC staff. District staff can help by telling the Washington staff that your group is important enough to be listened to.

4). TAKE THE TIME TO INTRODUCE YOURSELF TO THE MEMBER. Members of Congress and their staff as well as state legislators may not know who your group is or who you represent. Describe your membership in the district, what you do and your accomplishments. ***Better yet, invite the member and staff to visit a project, or your office.*** At meetings, do introductions and deliver a concise, effective message. Always be pleasant and cordial; even if the legislator and staff are not. Use brief personal stories to humanize and localize issues. Listen carefully to the legislators/staff responses and pick up clues as to their position.

5). EXPECT LEGISLATORS THEMSELVES TO MEET WITH YOU. With the possible exception of Senators from large states, you should be able to meet with members of Congress a couple of times a year. You can be sure they've made time for wealthy contributors and special interest lobbyists. If you get a "no" from the scheduler, be persistent—if they can't meet with you during this Congressional recess, what about the next one?

6). ALWAYS COME WITH *SPECIFIC* REQUESTS. Never ask them to support "programs for addiction and recovery" in general. Most will gladly promise to do that. Instead, ask them if they'll vote for a specific bill, sponsor a particular amendment, or send a "Dear Colleague" letter to other legislators to support your position. Ask for things that require the target to act in a specific, public way, which you can verify. For example, ask a member to write a letter supporting your position to the chair of a key committee, not just speak with the chair. Ask them to copy you on the letter. You can verify that a letter was sent as well as what it said.

7). CLOSE THE DEAL. Never leave a meeting without commitments and deadlines.

8). EVALUATE THE MEETING. You can use the meeting debrief form below to discuss and record what happened at the meeting.

9). SEND A THANK YOU LETTER. Be gracious and polite, no matter what happened. Include any information that you promised and restate what you discussed.

THERE ARE NO PERMANENT ALLIES OR ENEMIES. A member of Congress or other elected officials may be your worst nightmare on one issue, and then your leading supporter on another. If the member doesn't react the way you had hoped, thank them anyway and tell them you hope to work with them in the future.

DEBRIEF

Date: ______________________________

Your Name (s): ____

Office Visited: ____

Who was at the meeting, what were their job titles and contact information?

____
____
____

What did you get out of the meeting?

____
____

How did the meeting go? What went well? What would you differently the next time?

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____

What are you going to do to follow up?

____
____
____

DO'S AND DON'TS

Do

- Identify yourself and who you represent initially on each contact. Legislators meet hundreds of people and can't remember everyone they encounter.
- Know the issue and the status of the legislation. Refer to the legislation by number.
- Know your legislator. Have some idea of his/her position on the issue, past votes on similar legislation as well as legislative and personal interests can help you to tailor your arguments.
- Be brief. *(Legislators are very busy.)*
- Be specific and practical. Relate arguments to situations in the legislator's home district.
- Thank legislators.
- Keep the door open for further discussion, even if you don't agree at this time. "Politics make strange bedfellows" is not without foundation.
- Talk with legislators even if their positions are opposite yours.
- Think of yourself as a consultant to a legislator. You have expertise and insights that help the legislators understand the bill.
- Be honest. Never lie. Acknowledge opposing arguments and any political liabilities.
- Ask the legislator for support.
- Leave behind a one-page fact sheet summarizing your position. Highlight important facts and arguments. Include your name, address and telephone number so you can be reached if there are questions.

Don't

- Back legislators into a corner.
- Overwhelm them with too much information or jargon.
- Get into lengthy arguments.
- Be afraid to say you don't know. Offer to find out and send the information back.
- Confront, threaten, pressure or beg.
- Expect legislators to be specialists. Their schedules and the number of bills they track make them generalists.
- Give campaign contributions in their office – it's illegal. *(donating to a legislative campaign as a private citizen is perfectly acceptable at a fundraiser or you can simply mail one to their campaign office)*
- Ask the impossible….often

HOW TO NAVIGATE YOUR MEMBERS OF CONGRESS' OFFICES

Each Member of Congress has at least two offices, one in Washington, DC and the other or others in their home state. Members divide their time between the offices. You may want to establish relationships with staff members in both offices.

When Congress is in recess or not in session, Members tend to travel around their districts or states, giving you a better chance to catch up with them and talk with them directly. Each office operates differently, reflecting each Member's personality and style. Here are some general descriptions of staff members and their roles. For specific information about your Senators and Representative's offices, schedules and contact information, go to http://www.senate.gov/ and http://www.house.gov/.

Washington, DC office
Chief of Staff: Each member of Congress has a Chief of Staff, sometimes referred to as an Administrative Assistant or AA. This person is the highest-ranking staff member in the Washington, DC office and serves as a consultant to the Member on most issues. The Chief of Staff is also the person who is in charge of figuring out both political and public policy issues. The Chief of Staff oversees all staff and projects involving the members. Sometimes, though rare, the Chief of Staff is assigned to a particular legislative topic, such as health.

Legislative Director: Sometimes called the LD, is the second highest-ranking staff member in the Washington, DC office. While this person is usually assigned specific legislative topics, he or she is also responsible for overseeing all areas of legislative activity. The LD frequently speaks with the Chief of Staff and Member to brief them on current developments, meetings or issues from constituents. Unless the LD is specifically assigned to the legislation you are interested in, it's not usual to meet with them. Instead, you would meet with a Legislative Assistant.

Legislative Assistant: Each office usually has several Legislative Assistants or LAs, assigned to different broad topics of legislation, such as environment, health or labor. For addiction recovery issues, you should ask for the person responsible for health legislation. For reentry issues, you should ask for the person responsible for criminal justice or justice issues. The LA is relatively easy to contact and speak and/or meet with. They know the Member's stance on particular issues and will be able to relay your interests to the Member.

Scheduler: This individual schedules the Member's daily appointments and meetings while the Member is in Washington, DC. Although the Scheduler does maintain close contact with the Member, he/she does not meet with constituents to discuss legislative issues. If you want to meet with the Member directly, or to invite the Member to participate in an event, you should contact his/her Scheduler. This will be the only person, short of the Chief of Staff, who can arrange an appointment for the Member.

Staff Assistant/Interns: These individuals may have the least contact with the Member, but they hold a very important role in the Washington, DC office. They answer the phone, transfer your calls to the appropriate person and provide you with helpful information regarding your issues. They sometimes research specific questions or concerns you may pose, as well as doing administrative tasks such as photo copying and faxing. Even though this person is not the ideal candidate for discussing legislative issues, they can connect you with the one who is most appropriate to meet your needs. Building and maintaining good relationships with all staff members, including staff assistants is very important.

District office

District Director: This person is more commonly found with House members than with Senators and is in charge of the district office(s). Although they serve a purpose similar to the Chief of Staff, they are easier to contact and deal more specifically with constituents and special projects while the Member is in the district. They can arrange a meeting with your Member to convey your thoughts on an issue. It's usually much easier to schedule your meeting with the District Director, as that's part of their job – keeping in touch with constituents back home.

Scheduler: The District office Scheduler has many of the same duties as the one in Washington, DC. They manage public appearances and constituent meetings. This is the person to contact if you want to arrange a meeting at home, which is usually much easier than setting one up in Washington, DC.

Special Aides: Many offices have special aides who handle constituent concerns, such as Social Security, education, Medicare, Medicaid or veteran's issues. Their work is largely done by doing what is called casework, which is a specific issue a staff member is working on a constituent. These aides are not particularly knowledgeable about current legislation; however they can be very helpful for gaining contact information for other staff members or answering procedural questions.

THE LEGISLATIVE PROCESS

Steps in the Legislative Process (Note: All appropriations bills must originate in the House -- other legislation can originate in either the House or Senate. This example has the bill originating in the House.)

1). A bill is introduced.

2). The bill is assigned to a committee for consideration.

3). A sub-committee of the full committee considers the bill, marks it up (e.g. considers amendments) and reports it out, by majority vote of the subcommittee members. (In some cases a bill skips this step and is considered directly by the full committee.)

4). The full committee considers the bill, marks it up and reports it out, by majority vote of the full committee members.

5). The bill goes to the House Floor for a vote by all members. Members can offer amendments on the Floor to change the bill. A majority vote passes or rejects the amendments. Any amendments that pass become part of the bill. A final majority vote passes or fails to pass the bill.

6). The bill is sent to the Senate, where it must go through the steps 2 through 5 above, in the Senate.

7). After both houses of Congress pass their versions of the bill, a Conference Committee is appointed because there are usually differences in the bills that have been passed. The Conference Committee is made up of members of the House and Senate Committees that considered the bill. Their job is to resolve the differences between the House and Senate versions of the bill.

8). The Conference Committee reports out a compromise bill which goes back to the Floors of both the House and the Senate for consideration.

9). After the Conference bill is passed, in identical form by both the House and the Senate, the bill goes to the President for his consideration. The president either signs or vetoes the bill.

10). Congress can override a Presidential veto by a 2/3 vote of both houses.