

Process Guide | Lobbying workshop outline

Objectives

- Introduce participants to lobbying in an experiential way: drawing on existing experience and incorporating a role play
- Identifying lobbying as just one tool in a community organiser's toolkit of skills and techniques for change
- Provide resources and information for future reference

Time needed: 60-90 minutes

Resources needed

Copies of 'Lobbying: a tactic for social change' developed by Lois Levy or other relevant resources on lobbying.

How it's done

Step 1. Preparation

Ideally, share the resource material before your workshop.

2. Opening and check in [15-20 minutes]

Explain the objectives and scope of the min-workshop. Effective lobbying is not something that can be learnt in an hour or so but a skill that's an integral part of campaign strategy that can take a long time to acquire, through experience and reflection.

Invite people to share their interest in lobbying. How is lobbying important to a campaign you're involved in or thinking about? Invite a few participants to share brief stories about their experience. If someone in the group has been lobbied (as an elected representative or other decision maker) it'd be interesting to hear their experience.

You might ask people to talk in pairs first, then share with the group.

3. Lobbying in YOUR campaign [10-20 minutes]

Ask people to think about the campaign they're involved/interested in and to spend 10-15 minutes writing notes on the following questions:

- Who is your target (decision maker)? In your campaign, is this person a primary or secondary target?
- How can they help your group achieve your campaign objective?
- What's your ask? (Specifically – what are you asking them to do or commit to?)
- Why would they say yes?
- Why would they say no?
- What's your fallback ask? (If the target won't agree to your ask? This could be just another meeting).
- If your ask is agreed to what else will you ask for?

If any participants look lost, check they have a specific campaign objective in mind and understand the issues and context well enough to identify one or more targets to lobby.

4. Small group role play [20-40 minutes]

Break into small groups of 3. Ask participants to identify the campaign they each focused on in their writing time. If possible, break into small groups around campaigns people have a shared interest in. In each group of 3, one person take on the role of the lobbyist. This should be someone who knows the campaign reasonably well. One person will play the role of the target. They may need to be briefed by others who know more about the campaign and about the position they (the target) are likely to take.

The third person in each group will be the observer. Provide them with a print copy of the following prompts:

- While you're observing the role play, keep these questions in mind. We'll invite your observations first when we debrief the role play.
- What did the lobbyist say that increased their chances of impact and success?
- What did the lobbyist say that decreased their chances of impact and success?
- What was the most the lobbyist might have hoped for, under the circumstances?
- Was the lobbyist prepared with a useful or fall-back ask if they couldn't get the target to agree to their primary ask?
- How could the lobbyist have demonstrated enough power to secure a commitment to their ask?
- What forms of power did the lobbyist draw on? (eg the power of facts, the power of numbers (of constituents)? The power of moral authority?

The small groups will need at least 10 minutes to prepare for the role play. The participant who is playing the role of the lobbyist needs to ensure the target knows enough about the issue and the person they're playing. Let people know they can be creative. It's ok to invent 'facts' to embellish the context. For instance, you might like to tell the target how many of their constituents are members of your group or that you've surveyed voters in their electorate to gauge support for your campaign.

Prompt the small groups to begin their role play, provide any clarification and support people need, and make sure each group manages at least a short role play. If people finish quickly, they could discuss how it went and try again. Were there opportunities that the lobbyist didn't take advantage of? Any obvious mistakes to avoid next time?

5. Debrief

Bring the small groups back together for a debrief. Consider inviting the observers to share first, based on their prompts. First, they'll need to let the group know what the campaign was and who characters in their role play were. Invite the 'lobbyists' and 'targets' to talk about how it went from their perspectives. The targets may have some constructive feedback – ways the lobbyists might have increased their impact and prospects of a 'yes' to their ask.

Source: James Whelan, the Change Agency <http://www.thechangeagency.org>

These works are licensed under a Creative Commons Attribution-NonCommercial-ShareAlike License. You are free to copy, distribute, transmit and adapt this work under these conditions: attribution to the Change Agency and www.thechangeagency.org, and the original author/publisher (listed under 'Source'); only using this work for non-commercial purposes; share alike (if you alter, transform, or build upon this work, distribute the resulting work only under the same or similar license to this one)



Handout | Lobbying: a tactic for social change

Lobbying is just one part of an overall strategy or campaign to achieve your goals. It is a process rather than an event, though there may be specific lobbying incidents along the way.

It is pertinent to ask, “What is the overall purpose of your decision to lobby?”

- Is it to achieve social change? In this case the lobbying is part of a proactive vision of something better.
- Is it to prevent something undesirable from happening? In this case the lobbying is reactive to a predicted situation.
- Is it to change something undesirable, which is already in existence? In this case the lobbying may be both reactive and proactive.

Question

What are your perceptions of lobbying (positive and negative)?

Definitions

Lobbying is one method of raising public awareness of an issue and enlists support for a particular cause.

The objective of lobbying is to persuade decision makers to take or not to take particular actions (Kenny. 1999, p.217).

Lobbying can be direct to the decision makers themselves or indirect to those who can influence the decision makers.

A lobbyist will need certain knowledge, skills and personal qualities in order to be effective. These will develop over time and practice, even if you think you do not have these at the beginning of the process.

1. Knowledge

- Knowing the subject matter well and having the facts.
- Knowing your organisation well.
- Knowing the political context well. This applies to the politics of a company or organization as much as a government. What is important to these people; who holds the power; what is their philosophy?
- Knowing the political process- how are decisions made and what is possible.

2. Skills:

- Good interpersonal skills.
- Good communication, both written and verbal.
- Good conflict resolution skills.
- Lateral thinking or problem solving skills.
- Planning and organisational skills.
- Good networking skills.

3. Qualities:

- Assertiveness.
- Self-confidence
- Patience.

- Passion for the cause.
- Dedication and persistence.

The Process of Lobbying.

1. *Gather like-minded people*, who will support the lobbying effort. Continue to network and gain support throughout the lobbying effort. Decide early on who will be the lobbyists and what roles others in the group can fill to support the lobby effort. Ensure that everyone in the group is aware of the main arguments about the issue, so they can respond appropriately if asked by friends or acquaintances. Request the supporters to actively support the lobby effort by writing or telephoning the decision makers.
2. *Clarify the group's goals and obtain consensus*: Ask: "What is the group seeking to achieve with this lobbying effort?" Give the goal a name, which clearly identifies it and with which the group can identify. Set up effective communication systems in the group to ensure information, which may affect the goals gets to the people who need it. Be aware of side issues attached to your main issue and don't get sidetracked.
3. *Resources: consider the resources the groups will need such as money, equipment, access to computers, telephones etc.* Some of this may be provided in-kind from group members or supporters.
4. *Do your homework.*
 - *Who to lobby?* - it is important to be sure you are lobbying the right person i.e. the one who can help you achieve your goals. Check that it is the correct level of government for your issue and that the correct Minister has been identified. Other politicians at different levels may well support your efforts, but the main effort must go to the decision maker.
 - Identify and research the information needed for the *lobbying* effort.
 - Ensure that it is accurate.
 - Personalise the impact, if possible, with case studies
 - Consider what information the other side may have.
 - Consider the likely reaction to the lobbying.
 - Consider the hidden factors of power, status, trends and fashionable issues.
5. *Establish the group's credentials.* There needs to be a perception of some equality of power for lobbying to be successful. The group needs to demonstrate that its need is legitimate and that either a large number of people or influential people or both hold its views. Further that the decision maker will benefit from acceding to the lobbyist demands. Also recognise that there is a desire by the decision maker to appear responsive to the community's needs.
6. *Establish a plan for your lobbying effort*: Use the 5 W's - who, what when, where, why and how.
7. *Use a variety of tactics*: Do not rely simply on writing letters or submissions. Responses to these are often slow in coming and you may lose the impetus. However if it is a complex issue it is reasonable to allow the person you are lobbying some time to become familiar with the issue.
 - Lobbying will include *written materials* including letters, emails, faxes, postcards, submissions, briefing papers, media articles, flyers or pamphlets, posters, banners and newsletters etc. Politicians are required to answer written communications and it creates a paper trail of accountability.
 - These will need to be backed by *verbal communication* including telephone calls, interviews, catching the person at a venue, appointments at community forums.
 - Other tactics include those used in any campaigns, which reinforce the message you are sending. These may be marches, sit-ins, demonstrations, role-plays, exhibitions, displays, stunts etc.
8. *Know your enemy*: Spend some time finding out as much as you can about the people who will oppose you, which may include the person you are lobbying. Find out about their view on life, their interests, anything, which might make them more sympathetic to your cause. Be ready to counter their arguments by researching their perspective. Included in this is the need to know what your

proposal will cost compared to their ideas. Costs can be money, influence and status, loss of power. Costs may be direct or indirect and all should be considered.

9. *Timing*: the timing of lobbying is important. If you are aware of a decision-making time which is relevant make sure you are ready. Times such as sitting of parliament, holidays and particular events may be relevant.
10. *Face to Face*: once you have achieved a meeting, be prepared with concise and compelling arguments. Take care with the language you use, don't use jargon or words not readily understood by the listener. Clearly present the benefits to your listener of adopting your view and requests.
11. *Where*: The face-to-face meeting may be in the listener's office, neutral ground or on site of the issue, or in your office.
12. *Who will lobby*: It is essential to choose your lobbyists carefully and work out in advance the roles each person will play. Two or three people are a good number to present the case with one being the primary speaker. The other two can back up your argument, respond to comments the main speaker may have missed, watch the body language of the listeners and take brief notes of the process and content. *The lobby team* should practice prior to the appointment so they have confidence in their argument and approach.
13. *Briefing Papers*: a short one-page summary of your argument should accompany you to the interview. This should cover the issue, the background to the issue, the current situation and concerns, and your requests. Ensure you put your contact numbers on the paper. You can attach back up material such as statistics, graphs, maps, photographs, case studies and petitions. This can be given up front or at the end of the discussion, if you don't want your listener distracted by reading the paper.
14. *Follow-up*: remember to follow up on your contact to check on progress if any agreement was reached or if not when you may get a chance to present again. Follow up should also include a debriefing by the lobbying team and preferably includes a member of the group who was not there, but can ask pertinent questions.
15. *Review and evaluate*: this should be undertaken at regular intervals during the lobbying process. It should also happen at the end of a lobbying effort to identify the strengths and weaknesses which can inform your next effort.
16. *Celebrate*: any victories however small and support everyone throughout the whole process.

Source: Lois Levy, Gold Coast and Hinterland Environment Council, tCA Workshop Notes 2004

These works are licensed under a Creative Commons Attribution-NonCommercial-ShareAlike License. You are free to copy, distribute, transmit and adapt this work under these conditions: attribution to the Change Agency and <http://www.thechangeagency.org>, and the original author/publisher (listed under 'Source'); only using this work for non-commercial purposes; share alike (if you alter, transform, or build upon this work, distribute the resulting work only under the same or similar license to this one).