Montana YMCA
Youth & Government Program

Lobbyist Manual

2006 Edition

"Democracy must be learned by each generation."

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Overview

What are Lobbyists?
Lobbyists are one of the most important players both in real world politics and at the Youth Legislature.

Lobbyists are sometimes called the "third house" in a legislative body. Their role is to see that bills supporting their goals and ideals get passed.

You probably will use lobbying skills sometime in your adult life! Many ordinary citizens have a need to convince the government to support their viewpoint on an issue important to them. "lobbying" is not only a paid profession, however, this can become a real job! Some people make careers of being a lobbyist. During the real Montana Legislative session, there are 150 elected Legislators, but OVER 800 lobbyists!

Effective lobbyists know their issues, are willing to speak to legislators and try to influence opinions, are polite, never harass people, and are NEVER threatening.

Who Can be a Lobbyist?
In the Montana YMCA Youth and Government Program, ANYONE can sign up to be a lobbyist. Lobbyists have some special privileges that make the job especially worthwhile:

- Only lobbyists are eligible to move into Legislative seats if there is a no-show in one's delegation. (The delegation advisor decides which lobbyists can move over to take a vacant legislative seat.)
- Only lobbyists are eligible to apply for positions on the Governor's Cabinet. (Once appointed, Cabinet members cannot move into Legislative seats)
- Only lobbyists may use the Internet connection for research during the session.

What are the Roles and Duties of Lobbyists?

- Write up a one page position paper on an issue they care about (required).
- Become an "expert" on their topic so they can explain it to others (recommended)
- Testify in committees (required).
- Create a lobbying plan when upon arrival at the session (required).
- Write up fact sheets to give legislators so they can promote their ideas on the floor. (recommended).
- Write short (100 word minimum) editorials for the newspaper promoting their positions (required).
- Note legislators who support them; and help them out by feeding them facts & good arguments they can use (recommended).
- Be the legs of their legislator friends; let them know who else supports your mutual goals and help form coalitions (recommended).

The other important role a lobbyist plays is that of EDUCATING LEGISLATORS. No one person can possibly be an expert on every topic he or she needs to vote on, so a lobbyist's job is to be able to tell legislators what they need to know about specific issues. Lobbyists become experts their area of public policy!

Lobbyists spend a lot of time in committee hearings and in the galleries listening to others to discover where they stand on the issues. However, real lobbyists are seldom bored--they're too busy listening and then trying to get their positions across to others.

As a lobbyist, you spend your time trying to win people over to your point of view through education and persuasion.

Lobbyist Position Papers Made Simple

All lobbyists must write a one-page position paper. (In lieu of a lobbyist paper, lobbyists may also submit a ballot initiative or co-author a bill. See Youth Legislature or Ballot Issues sections for details)

As a rule, lobbyist papers are easier! They are due into the State Office by the publicized deadline.

Remember that your job is to educate legislators on issues they may know little about. Use accurate facts, be able to cite your sources, and help legislators who support your ideas do a good job.

After you read the basic guidelines below, click here to see a sample paper:

The Basics

- Position papers are to be ONE page long. This means between 200-375 words.
- Your name and delegation needs to be at the top.
- Use your organization name (the group you are supposedly lobbying for) as a title. You can borrow the name of a real organization or you can create your own group. If you use a real group's name, try to accurately represent their views. Do research to find out more about existing interest groups.
- A simple disclosure statement needs to be at the very bottom. Use the following phrase exactly:

This document is in compliance with the Montana YMCA Youth Legislature Lobbyist Disclosure Policy.

Tips for Writing Your Position Paper

- Position papers must represent ONE issue. Limit your topic to a basic idea - business, the environment, tax policy, social issues, etc. Groups like political parties or labor unions might have several areas of interest, but they still tie their position together under one "umbrella" - justice for the working poor, less regulation, or whatever.
- Statistics and handy facts are a good idea.
- You should explain both what you are for and what you are against.
- Explain clearly what position you are taking on the issue. Be short but specific. If you want to be a lobbyist for a group dealing with the abortion question, for example, be sure your paper makes it clear whether you are pro-choice or pro-life!
- Explain your reasoning. Be flattered, not offended, if a legislator takes your argument and uses it on the floor to advance or defeat legislation that you are following!
- A "call to action" is a good idea - tell people what you think they ought to do.
- The lobbyist position paper cannot exceed one page, but should be at least 200 words.
- Papers should be single spaced, but with double carriage returns between paragraphs (in the block style shown on the following page.)
- Do not forget your disclosure statement at the end!
- All position papers must be turned in by the deadline in a digital format (emailed or sent on a disk) by the deadline.

See a sample position paper on the next page.

NOTE: The words in parentheses have been added for instructional purposes and should NOT appear on your position paper.

(Name and Delegation of Lobbyist):
Jane Doe
Two Dot High School

(Name of Organization):
Concerned Montana Citizens Against Government Waste

(Introduction of organization and position of lobbyist):
I represent concerned citizens who oppose government waste of tax dollars. We support efficient use of tax money to help the majority of the American people and will speak out against mismanagement and fraud.

(Facts, opinions, statistics and arguments):
In the US economic system, private businesses are required to balance their budgets, file accurate reports, pay taxes to the government, minimize debt and make up for losses as soon as possible, or they cannot compete in the economic system. They go out of business.

On the other hand, the federal government is hypocritical, hiding excessive expenses, mismanaging cash and paying too much money for goods and services. Federal procurement offices have been known to spend $91 each for 3 cent wood screws, easily found at a local hardware store. Saving budget dollars is not considered, and losses are just added to the National Debt. Where is the accountability?

Because politicians and bureaucrats are not spending their own personal funds, they are unconcerned about mismanaging public tax revenue. American workers labor from January 1st through May 5th just to pay their taxes! Some of these funds are used to support programs that do not benefit the American Public. Some examples are:

- $49 million to build and furnish a rock and roll museum
- $1.9 million for an "All Ireland genealogy project."
- $500,000 to study the effect of cigarette smoking on dogs.
- $19 million to study whether or not belching of cows and other livestock harms the ozone layer.
- $46,000 to determine how long it takes to cook an egg.
- $170,000 to fund a Dunkin' Donuts store in Oklahoma
- $2 million to renovate one of the House restaurants

(Summary of arguments and call to action):
As shown by the entries on the above list, the government seems to feel that they may use American tax dollars any way they wish. As the American public, we should protect ourselves against this corruption. We must start with our state and local government. By keeping an eye on our elected officials, we will let them know that we do not appreciate mismanagement of our hard earned money.

(Statement of Lobbyist's position on the issues):
I will support legislation that makes wise use of taxpayer dollars, and oppose bills which are wasteful.

(Disclosure statement):
This document is in compliance with the Montana YMCA Youth Legislature Lobbyist Disclosure Policy.

(Original paper written by Carrie Jo Peterson, content revised and edited for use in this document.)

Life as a Lobbyist: Tips of the Trade

As mentioned before, lobbyists do one of the most important jobs in the Youth Legislature: educating legislators. Legislators cannot possibly be experts on every issue, and it is the job of the lobbyist to be sure that legislators understand an issue so that they cast a reasoned vote. Without lobbyists, legislators are voting blind on some issues!

The requirements for Youth and Government lobbyists reflect real life techniques used by effective lobbyists.

Mandatory

- Write a one-page position paper.
- Testify in committees. You usually will have 2 minutes to speak. (Written testimony may be submitted by students with special needs.)
- Create a lobbying plan upon arrival at the session.
- Write a short (100 word minimum) editorial for the newspaper promoting your positions.

Beyond the requirements, below are some suggestions that will help any lobbyist be more effective:

- Become an "expert' on your topic so you can explain it to others.
- Write up and copy short fact sheets to give legislators so they can promote your ideas or favored bills on the floor.
- Note and track bills that interest you; the Lobbyist Action Plan you are required to fill out at the beginning of the session will help.
- Have advance arguments prepared to promote your position(s): Create speech(es) ahead of time to present in committee.
- Note the bill hearing schedules posted on the committee dockets so you minimize missing a chance to testify due to a time conflict.
- Create written testimony to send to committees if you cannot speak due to a time conflict.
- Note legislators who support you; help them out by feeding them facts and good arguments they can use on the floor.
- Use your editorial to support a specific bill.
- Be the legs of your legislator friends; let them know who else supports your mutual goals and help form coalitions.

General Rules

- Lobbyists are not allowed on the floor of the House or Senate during floor sessions or for 15 minutes before and after the floor session.
- During committee hearings, you may visit several committees, but stay in the hearing rooms. DO NOT loiter in the halls, and be very quiet there so as not to disturb the Capitol staff.
- Committees will not wait for you or adjust their schedules for you. Do not ask!
- Generally, you should be in the House or Senate gallery during floor sessions observing and tracking bills.
- During floor sessions, you may also be in the snack bar area and the carpeted hall by the Senate chambers for the purpose of drinking a pop, lobbying legislators or having pages run notes. (This is where real lobbyists spend their time, too!)
- A legislator may escort you into the House Antechamber for a discussion of a bill, but you can only be there if accompanied by a legislator.

Use of Pages

Pages may run errands for you if:

- You have messages to or from legislators
- You have written testimony that needs to be delivered to another committee.
- You are in a committee and the message regards the status of a bill in another committee.
- Other than legislation-related messages, you have to run your own errands.
- Pages read ALL notes. They keep contents confidential unless the note is inappropriate, in which case they are to bring it to an adult advisor.
- Inappropriate notes include those which:
    - contain sexually explicit language
    - contain profanity of any sort
    - contain threats or personal attacks
    - advocate engaging in illegal activities

Techniques for Lobbying

Make an Action Plan

When you arrive at Youth Legislature and receive your billbook, go through it and note bills that are of interest to you. Before the conference, you can start planning by perusing the bills on the website. You will be given an Action Plan at the lobbyists' workshop. Use this form to write down the bills on which you wish to testify.

When dockets are posted, go around and note the times your "action bills" will be heard. (An action plan must be completed and a copy turned in to the office).

Plan which bills you will testify on in person and prepare written testimony for those you might miss. Get to the committee hearings a bit before your bills are scheduled to be heard.

If your bill passes the committee, see the sections below for ideas on how to lobby during floor sessions.

If the bill passes its chamber, then you begin again in the other side's round of committee hearings and floor sessions. At transmittal, you may choose to pick a different group of bills to support if your first choices are killed.

Pigeonholing

Pigeonholing is a term used to describe when you informally take someone aside to talk to him or her for a moment or two. Lobbyists use it to find out who supports their positions and to win others over.

It is the technique most people think of when they think of "lobbying."

The personal touch can be the best way to sway someone's opinion. Your speech in committee may be brilliant, but it is more effective if people are already familiar with the issue.

Pigeonholing is done during breaks, recesses, in the halls, at meals, and any other times when people are not actually in committee or floor sessions.

However, important as it is to talk about the issues, avoid harassing people. Sometimes people are in a hurry to get somewhere or have other reasons not to talk. Respect their rights.

See if you can get a majority won over to your side before the bill comes up for a vote. If your bill passes committee, talk to as many legislators in the chamber as possible, so you know how individual legislators feel about your target bill.

In committees, floor sessions or at any time, if someone is on your side:

- Ask if they need any facts or ideas for a speech.
- Offer to help them come up with some additional convincing arguments.
- Be a sounding board for their ideas.
- Offer to do research. You have internet access!
- Be a messenger; bring together people who could become allies.

If they oppose your position:

- Politely inquire as to their reasons; sometimes an opponent can be turned into a proponent by correcting misunderstandings, providing accurate information, or simply being a friendly face.
- Be polite if they do not come around to your position. Let them go about their business if they do not want to talk to you.
- Do not take opposition on one issue as a personal rejection. The same person might support you on a different issue.

Polling
In the office, you can obtain roll sheets, which list all members of each chamber. You can use these to track who is in favor of what.

If your bill passes committee, use the roll sheets to poll legislators in that bill's chamber on their position.

You can make notes as to whether they are "strong" supporters, "soft" supporters, strong opponents, or soft opponents. People with strong positions cannot usually be swayed, but people who have "soft" opinions are more likely to change their minds.

You may get tired tracking down people to ask the same thing over and over, but always be polite.

You may also compare notes with other lobbyists to see the general direction a legislator leans. Help one another out if you find yourselves in agreement on an issue.

Once you have polled most legislators, you will have an accurate idea of how much support is out there for your agenda.

If you have many supporters, you can let your soft supporters know that the bill is popular (so they do not change their minds), and encourage strong supporters to ask their friends to vote with them.

If you do not have enough supporters to pass a bill yet, you can create a lobbying strategy:
Do you need to pigeonhole more people and convince them of the bill's worth? Do you need to ask strategic supporters to talk to their friends? Do you simply need to overcome misunderstandings with fact sheets and other information?
If you have mostly "soft" opposition, you may be able to turn the tide your way with these methods.

Discovering whom your supporters and opponents are is a very important reason to poll legislators! Remember it only takes 50% of the legislative body plus one vote (That's 51 in the House and 26 in the Senate) to pass most bills.

Written Testimony
Sometimes you cannot be in two places at once. If this happens, write up a short piece for the legislators explaining your position on a particular bill and have a page run it into the committee.

You may submit written testimony using the forms provided, or you can use notebook paper. You can also use a fact sheet if it is relevant.

You can ask a friend (a lobbyist, page, reporter or legislator—anyone) to read your testimony for you in committee on your behalf during the public hearing.

Fact Sheets
Sometimes you may wish to provide information to legislators in an easy-to-use fashion.

All legislators will have a copy of your lobbyist paper in the back of their billbooks. If you do a great job on it, you will have a ready-made fact sheet! You can ask legislators to mark it in their billbooks as a reference.

You can also create a new fact sheet with statistics, charts or graphics, philosophical reasoning, and effective arguments for your position and distribute it to people that you think will either use the information on the floor or be swayed by the power of your position once it is stated clearly.

Important note: For anything beyond your lobbyist paper in the billbook, you have to pay for your own copies! To save money, you might want to do "quick lists" of facts that can be copied four or six to a page, cut them out, and distribute them as notes or bookmarks. You could also use sheets of mailing labels for the same purpose. However, be careful with adhesive materials: DO NOT place stickers on any surface in the Captiol!

Testimony in Committee

You may testify on any bill in committee hearings. You **must** testify on at least one bill, demonstrating that you have done so by signing the sign-in sheet that is in each committee.

It is a good idea to stay through the entire bill debate***. All parts of the committee hearing are open to the public.*** There are no "executive sessions" where the public cannot sit in and listen.

You may testify on as many bills as you wish, within reason: A chair can ask you to allow others who have not yet spoken to speak first if you testified earlier. A chair can also refuse to allow you to speak if you have been disruptive, rude, or frivolous in an earlier bill hearing.

You will sit quietly in the committee room in the area set aside for the audience until it is time for the bill hearing. At that point, the hearing will proceed as follows:

> CHAIR: "We are now ready for consideration of Senate/House Bill #_____: An Act to... (reads title). Is there a sponsor present?"
>
> The bill's legislative sponsor will get up and explain the bill, explaining why the committee should support it.
>
> Next, the public hearing is opened in this way:
>
> CHAIR: "Will proponents of the bill now sign in and present their testimony?"
>
> This is where you have a chance to speak. Proponents speak first, one at a time, then opponents. The Chair will direct when it is time for each group to speak. Lobbyists, pages, reporters, members of the other chamber or any other member of the "public" may speak at this time, taking turns.
>
> At the discretion of the Chair, people can take turns informally, or they can sign-in in advance and testify in a specific order. The Chair can also limit the total number of speakers on each side of the issue. The Chair only has to be sure to allow an equal opportunity for both sides to present testimony, and give priority to those lobbyists who have yet to present their required one speech.
>
> When proponents have finished, the chair says:
>
> CHAIR: "Will Opponents of the bill now sign in and present their testimony?
>
> If the committee has set an overall time or speaker limit on the time allowed for the public hearing (there usually is a time limit), you may not get a chance to speak if that time elapses before your turn. If so, you will just have to try again on another bill.
>
> When it is your turn, stand up and approach the speaker's lectern or other area the committee has set up for speakers.
>
> When you get up to speak, you sign in. **ALWAYS sign in!** This is the ONLY way the office will know that you have presented testimony. A sign-in sheet is in each committee room, usually on the speaker's lectern. On the sheet, you write your name, indicate which bill (by number) you are speaking on, and if you are a proponent (for the bill) or an opponent (against).
>
> Once you have signed in, you may get up and give a speech outlining your position on the bill.
>
> Always speak within the time established by the committee. Usually this will be 2 minutes, but can be changed by a committee vote. <u>Expect to be cut off if you exceed your time.</u>
>
> When members of the public have finished speaking or when the time limit for testimony has elapsed, the chair will say:
>
> CHAIR: "Are there questions by members of the committee regarding this bill?"
>
> Legislators who are members of the committee are the only ones who may ask questions. (If you have a question, pass a note to a member of the committee, perhaps they will ask it for you.) No more than five questions can be asked of any speaker; an individual committee member may ask no more than two questions.

When questions are finished, the Chair will say:

CHAIR: "The Sponsor of this bill may have (1 or 2) minutes to close."

When the sponsor finishes the closing speech, the Chair says:

CHAIR: "This hearing is now closed. We will now begin debate. Do I hear a motion regarding this bill?"

At this point, the committee will debate and vote on the bill and usually no other people may speak. Committee members may ask you a question about your earlier testimony. If they do, consider yourself very lucky! It can be a good chance to promote your bill!

You may speak to answer a specific question, but cannot cross-examine, debate or enter into the discussion in any other way.

Written testimony created during the session that is not the lobbyist's position paper nor their newspaper editorial may be submitted in lieu of spoken testimony for delegates with special needs. The delegation advisor needs to have these exceptions cleared in advance with the State Office.

Lobbyist Editorials

You will write an editorial for the student newspaper during the session. Most lobbyists do this during floor sessions when there isn't much to do but sit and listen (and send notes to legislators). Monday afternoon is a good time. Your editorial is a short piece - only 100 words minimum - but is required. It is best to turn your editorial in early so the paper publishes it in time to influence people, but it must be turned in by Tuesday afternoon by the announced deadline.

Example of a Lobbyist Editorial

Senate Bill 25, sponsored by Senator Jane Doe, is a bill proposing that children begin to learn a foreign language, decided by each district, in first grade.

It is a proven fact that children learn languages much faster than teenagers and adults. They also retain information better.

America has gotten an attitude that English is the superior language and everyone should conform to our standards. Whether this is true is not the issue. The issue is that not everyone speaks English and the sooner we realize this, the sooner we will grow as a nation.

This bill is also based on the fact that learning a foreign language broadens your mind and allows you to learn other things better.

I urge everyone to support Senate Bill 25!

Sally Roe, Lobbyist
Two Dot High School

Lobbyist Code of Ethics

Most states have a Code of Ethics for Lobbyists. We try to keep our Youth and Government Lobbyists Code of Ethics simple, each part based on the belief that decent behavior makes a person a more effective lobbyist.

In addition, cooperating with the focus of the YMCA on Character Development, the Youth and Government Lobbyist program challenges participants to accept and demonstrate the positive values of caring, honesty, responsibility and respect.

No Bribes
There is an ethics law for how real lobbyists in Montana spend money. We simplify it for Youth Legislature: You can run down to the cafeteria and buy a legislator a Twinkie, but do not spend YOUR money on it.

No Threats
This usually will not do you any good, anyway. It is likely to make you an enemy, and can get you kicked out of the Youth and Government session for a Code of Conduct violation.

No Lying
If you are caught giving out inaccurate information, if you give a person information that later is proved false on the floor, or if you make someone look like a fool, he or she will remember - and your reputation as a lobbyist is in the toilet!

No Harassment
If someone is not going to come around to your position, do not go out and make their life miserable. They have a right to a different point of view. Again, harassment is a Code of Conduct violation.

Lobbyist Awards

Lobbyists who complete all requirements by the announced deadline (usually Tuesday afternoon) will be awarded with a lobbyist pin.

From eligible lobbyist pin recipients, four to six finalists will be chosen, based on completion of requirements, quality of work, evidence of active participation and/or Committee Chair or Adult Staff recommendation.

Do not hassle committee chairs or advisors about being nominated. Get noticed by doing a good job, by getting up and giving lots of quality testimony.

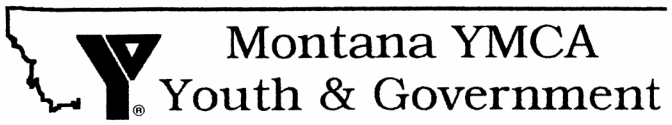
The finalists will be put on the election ballot and the Lobbyist of the Year Award will voted on by all participants at the Tuesday night election.

Pages, press, court participants, legislators, and lobbyists get to vote for lobbyist of the year, so be impressive to everyone.

Forms

On the following pages are samples of the forms most commonly used by lobbyists at the Montana YMCA Youth and Government Session:

- **The Lobbyist Registration and Action Plan** is filled out during the Lobbyists' Workshop on the first day of the conference. It is a duplicate form and one copy is required to be turned in to the main office.
- **The Committee Visitor Register** is the sign-in sheets used in all committees to track who testifies in committee. This sheet is turned in to the main office at the end of each committee session and is used in part to award Lobbyist Pins!
- **The Bill Testimony Form** is a handy way to submit written testimony. Blank copies are available at the main office as well as in the committee file boxes.
- **The Roll Sheet** is a sample from the 2005 session showing a list of members with check boxes for recording votes and some space for notes. Copies of roll sheets for each Chamber will accurate membership lists are available each session in the main office.



Coalition Registration and Action Plan

Coalition Name: _____ Date: _____

Members:

_____
_____
_____
_____
_____
_____
_____
_____
_____

Delegation:

_____
_____
_____
_____
_____
_____
_____
_____
_____

Directions:

1. Fill out this form and deliver one copy to the office or the lobbyist advisor by Monday noon.
2. You need to track a minimum of 1 bill per coalition
3. Use the following codes for tracking:
   - DP = Do Pass
   - DPA = Do pass with amendments
   - DNP = Do not pass

Coalition Chair:

_____

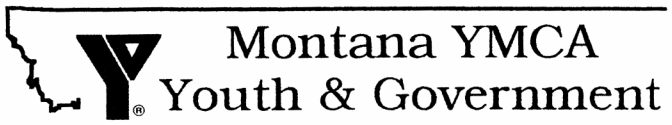
Delegation:

_____

Brief Statement of Position:

_____
_____
_____
_____

Bill Information					Bill Tracking					
Bill #	Topic/Title	Lobbyist Assigned	Desired Result	Hearing Time	Committee Name	1st Comm.	Floor of Origin	2nd Comm.	2nd Chamber	Gov.



Committee Visitor Register

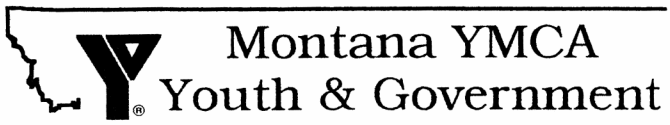
Please sign here if you testify on any bills. Turn in any written testimony
to the committee chair or his or her designated representative.

Name of Committee _____ (circle one) House Senate

Date and time frame of session _____

		Check One		
Bill #	Your Name	Support	Oppose	Written

Turn in this form to the main office at the end of each session.



Bill Testimony Form

If you wish to submit written testimony on a bill, please use the space below to write your comments. You may also submit previously prepared written comments. Turn in any written testimony to the committee chair or his or her designated representative.

Name of Committee _____ (circle one) House Senate

Bill Number: (example HB 23 or SB 142) _____

Position on Bill (circle one): Support Support with Amendments Oppose

Testimony:

Your Signature_____ Date _____

Your Name Printed _____ Delegation _____

All testimony must be signed.

Montana YMCA Youth & Government

Roll Sheet – Senate

Last	First	Yes	No	Notes
Poeschl	Adam			
Sayler	Andrew			
Martin	Aubrey			
Kroll	Beau			
McNulty	Bridgett			
Marti	Britta			
Erb	Brynn			
Murphy	Calvin			
Anderson	Chris			
Stout	Cliff			
Lemke	Daniel			
Shelton	David			
Bjerke	Debbie			
Tohtz	Erica			
Cleaveland	Ginny			
Jacoby	Hannah			
Lawrence	Hannah			
Kenney	Jamie			
Stanley	Jennie Lynn			
Roddham	Kaitlin			
Heistuman	Katy			
Driscoll	Kelly			
Plumage	Lane			
Funk	Laura			
Richardson	Michelle			
Calcaterra	Mikal Anne			
Stout	Noah			
Landsiedel	Peter			
Hotaling	Sarah			
Harris	Tyler			
Kolski	William			