“What Makes an Effective Advocate?” Congressional Staff Survey

Conducted by:

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Results Report
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Executive Summary

<u>Background</u>
AdVanced Consulting launched the "What Makes an Effective Advocate" survey in order to provide advocates with up-to-date and accurate information about how best to deal with Congressional offices. The online survey was conducted from February 14, 2003 to April 18, 2003.

<u>Survey Results</u>
Respondents overwhelmingly recommend the "less is more" approach to advocacy. With their busy schedules, they appreciate short, focused presentations and correspondence. One staffer commented "Use the KISS method, keep it simple stupid." A significant number of respondents are turned off when advocates come by just to chat. More often, they encourage advocates to "have an action plan" and be clear about what they want the staff to do.

Interestingly, no one form of communication stands out as the most preferred; each staffer has his/her own preference for fax, emails, phone calls, etc. E-mail, long reviled by some as completely ineffective for advocacy, received mixed results from respondents, with comments ranging from "Don't do it" to "E-mail is very good." However, most seemed to agree that e-mail can be effective if used properly, i.e., to send out relevant, timely information. As one staffer put it "Do a little research first. Know who you are emailing and that it is the right person for the issues. Also, get to the point. Staff don't have time to read through the fluffy promotion. The email should be smart and to the point."

As for meetings, respondents put a tremendous amount of importance on how they are treated. They are offended by advocates who are disappointed to meet with "just me," and many remark that it is highly unlikely that the advocates will get to meet with the member anyway. Not surprisingly, respondents want to see advocates who are from that member's district and recommend that one to three people attend a meeting in their office.

In considering the steps that advocates should take before coming to meet with an elected official, respondents strongly supported the ideas of looking up a legislator's record (60%), knowing something about the district (80%), and organizing information so it can be presented in five minutes (98%). The results for the survey show real opportunities for advocacy organizations to better train their members, as respondents also agreed that most advocates generally do not take these important steps.

Respondents agreed most on the following issues:

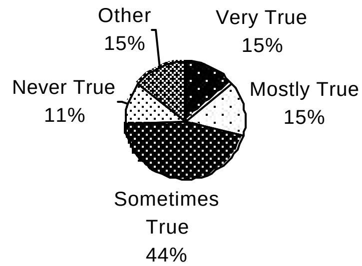
1. Advocates should organize their information so it can be presented in five minutes (98%),
2. Feb. thru April is a busy particularly busy time for constituent contact in DC (96% strongly agree or agree),
3. Advocates should know something about the district (80%),
4. Advocates should leave limited, highly relevant and focused information (80%),
5. One to three people is the ideal number to come to a meeting in the office (78%),
6. It is better for advocates to come in for a meeting to request something specific versus coming just to chat (76%).

Survey Details
Respondents were reflective of a cross-section of different positions in a Congressional office, from Chiefs of Staff to Staff Assistants. The "What Makes an Effective Advocate Survey" was conducted from February 14, 2003 until April 18, 2003 on Zoomerang (an online survey program). Flyers about the survey were hand delivered and faxed to every legislator's office on the Hill and emailed to the offices' legislative directors, press secretaries and staff assistants with the request that the email be passed along to other staff in the office.

It should be noted that AdVanced Consulting is not a survey research firm, nor do we in any way suggest that this survey is reflective of the opinions of all Congressional staff. Rather, the purpose here is to offer valuable insights into the perspectives of those Congressional staff with an interest in these issues. In addition, we hope to provide anecdotal evidence for advocates on how to be most effective in dealing with their elected officials.

In conclusion, AdVanced Consulting would like to acknowledge and thank the Congressional staff who took time from their very busy schedules to respond the survey.

1. Many advocates think Email is not a useful way to communicate with a Congressional office. Do you agree?



Very True	15%
Mostly True	15%
Sometimes True	44%
Never True	11%
Other[1]	15%

2. How can advocates make their Email communication more effective? (Categories derived from responses.)

Content

"Include information about who they are and what they want."

"Be specific."

"They should include a deadline for action"

"Use appropriate subject headings."

"Short and sweet; no spam -like exchanges; only contact an office when a specific issue arises"

"Present all information needed in email and check email often."

"Keep it short and remind me briefly who you are."

"Get to the specifics and tell me what they want. Always include contact number."

"Use it like a personal communication, not som ething that you just point, click and add your name to or to send a one-sentence derogatory comment."

"Graphics maybe, make it stand out from the rest."

"Don't overuse it. When used, be short, factual and to the point. Spin is less important than usefu l facts."

"Hard to say. We get so much spam e-mail that it often gets deleted outright. But standard journalistic form of putting the most important points in the heading and in the first few paragraphs will increase their chances."

Preparation

"Do a l ittle research first. Know who you are emailing and that it is the right person for the issues. Also, get to the point. Staff don't have time to read through the fluffy promotion. The email should be smart and to the point."

"Develop a relationship with the staffer."
"Actually take time to write your letter, rather than the 5 seconds it takes to send a form letter."

"Only use Email after phone call or face to face contact established and I have requested Email."

"Call, find out who the LA in your issue area is and email them directly. Emails to any public address or site will likely be processed by someone who is not as able to effectively address your problems."

"Emails are most effective when a staffer knows the person or is expecting the email. A quick phone call to the staffer before sending an email to let them know to expect it is helpful."

Whom to email

"A) Respect staff personal accounts. B) Have advocates email from website or to main email account - they will get a response faster via email than hardcopy."

"Email an individual staffer instead of just the centralized email address."

"Be brief. If they know the recipient, their chances of being effecting rise, but if the email is blind, it will most likely not be effective. We staffers h ate getting unsolicited email from advocates whom we do not know."

"Most unsolicited email I receive goes straight to "deleted items" without being read. Advocates often send useless information, or information on issues I do not handle."

Other

"Lobbyists, as opposed to grass roots advocates should only communicate with a staff person after they have met fact to face and be invited to keep in touch. Random unsolicited emails usually get the attention they deserve."

"List a subject or where they are from in the subject line. If we don't know the person, we'll be agitated to receive an Email from them and not know what we are opening."

"Don't use it." (2 respondents' replies)

"Coordinate with a phone call."

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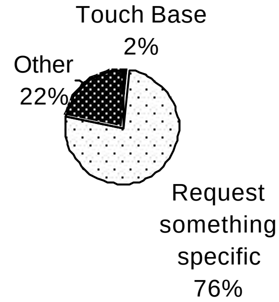
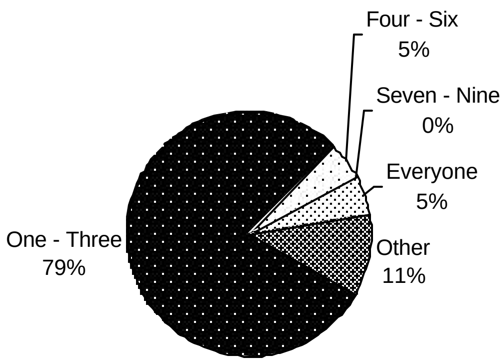
1 Responses in the Other category: "Initial contact in person, follow up by email," "Email is very good!"

3. In your opinion, is it better for constituents to come in just to touch base or to request something specific?

Touch Base	2%
Request something specific	76%
Other[2]	22%



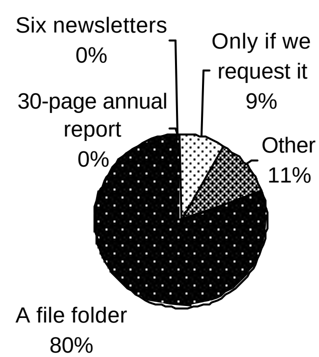
4. How many people would you suggest come to a meeting in your office?



One – Three	79%
Four – Six	5%
Seven – Nine	0
Everyone and Their Mother	5%
Other[3]	11%

5. How much information should an advocate leave with your office after a meeting?

- A file folder with a one-pager about the group and contact information: 80%
- The group's 30-page annual report: 0%
- Six newsletters, 13 newspaper articles & a picture of the family dog: 0%
- Only leave information if we request it: 9%
- Other: 11%[4]



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[2] Responses in the Other category: "Depends on the situation, whatever they want." "Both, depending on situation" "Just request something once I know who you are." "Both; ask, and then touch base to follow up. We forget." "If it's a busy time of year, don't touch base."

[3] Responses in the Other category: "Some groups are bigger than others & that works." "Offices are small. Spare me the group."

[4] Responses in the Other category: "Just the paper; leave out the file folder in #1." "Plus 1 page executive summary of issue/request." "Trust me, less is more." "One-pager plus a little bit of in depth information."

6. How can an advocate make his/her message memorable? (Categories derived from responses.)

Relevance & Length of Message

"Give practical examples from the district or state if possible."

"Be specific and succinct. Make it relevant to the District. Why is this important to the Congressman?"

"By being brief, concise, and polite and having good examples of the positive effects their organization has on our district."

"Make it personal, and state the relevance to our constituency."

"Relate issue/request to member's District."

"Short and sweet."

"Have a short list and explain each item briefly, and then have a discussion - examples are good."

"Be short and precise."

"Be specific, brief and don't leave too much information or the main message will get lost in the volume of handouts."

"Relate it to the district. Local, local, local."

"Keep it brief, but informative."

"Make the one-pager and info SUCCINT. Articulate, organized info gets farther than junk on staffers "to do" list."

"Brevity is key."

The Attitude and Approach

"Be very clear about what it is and who supports it. Be honest about the financial and political backers of the group."

"Have an action plan. Meaning, have a goal in mind and a means in mind to achieve it. We're busy here and don't want to hear flowery speeches in the place of solid arguments for why we should support their position. Also, schedule your meetings in advance of action deadlines. It's extremely annoying -- both to us and to the groups they represent -- to have lobbyists show up the day of floor action on an issue and expecting their visit to have an impact. We all have the distinct feeling these advocates are just billing their clients with no intention of actually persuading anyone to do anything. Oh and one last thing, know the process. I've seen lobbyists/advocates who know less about how government works than many eighth-grade civic students. "

"Come in laid-back. Yes, we work in an important field, but there is no need to be serious all the time. Make jokes and keep the presentations short and sweet. It's our job to know what you're talking about so no elaborate explanations; if we don't know, we'll ask you."

"Make it a positive meeting."

"Be patient and understanding."

"Be appreciative of staff if you've interacted with them before. Not necessarily that you need to bake cookies, but if someone was helpful or supportive it's nice to hear that it was noticed. This is especially good to let a Member know about his or her staff."

"A one-sentence catch phrase that helps jog the memory."

A Little Something Extra

"Sorry, but trinkets stand out. Some will get thrown away, but others stick around. Either way, it differentiates that meeting from the stack of papers from other meetings."

"I enjoy anecdotes."

"Trinkets and toys."

"A clear and concise message is memorable, especially if the advocate lets the staffer know they'll be following up soon. Also, hand drawn pictures from kids are the best!"

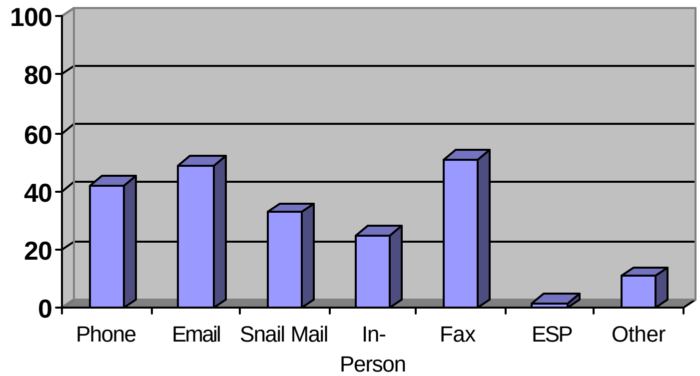
"Buy coffee or a meal. You will get undivided attention and you are more likely to get a follow up call back or second meeting."

"One of the best presentations I saw was a file folder that slipped directly into my file cabinet."

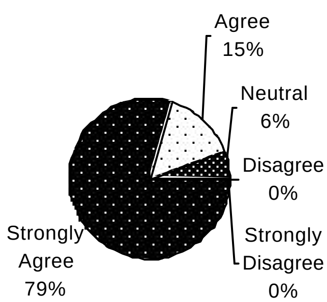
"Come in at the right time and provide information I need to act on your behalf (write a draft letter for me, provide the appropriations line items if possible, etc.)"

7. How do you prefer constituents contact your office? (Pick all that apply)

Phone	42%
Email	49%
Snail Mail	33%
In-Person Meetings	25%
Fax	51%
ESP	2%
Other[5]	11%



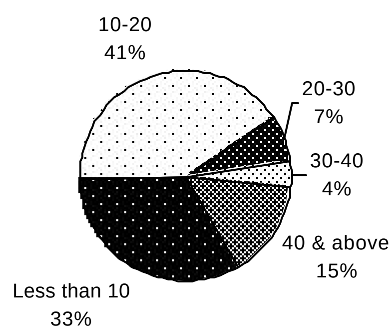
8. Feb. through April tend to be particularly busy months for constituent contact in DC.



Strongly Agree	79%
Agree	15%
Neutral	6%
Disagree	0
Strongly Disagree	0

9. During this period, approximately how many meetings do you have per week?

Less than 10	33%
10-20	41%
20-30	7%
30-40	4%
40 & above[6]	15%



[5] Response in the Other category: "All are fine depending - like faxes the least."

[6] Quote from 40 and above category: "35-55 per week - We don't call it March Madness because we love basketball"

10. What, in your opinion, should advocates do to prepare for a meeting in your office? (Pick all that apply).

Look up the legislator's voting record	60%
Go to the legislator's website	53%
Know something about the district	80%
Have organized their information so it can be presented in five minutes	98%
Other[7]	20%

11. What percentage of advocates do the following before coming to a meeting in your office?

Look up the legislator's record

Less than 25%	52%
25-50%	22%
50-75%	9%
75% and up	9%
Other[8]	9%

Go to the legislator's website

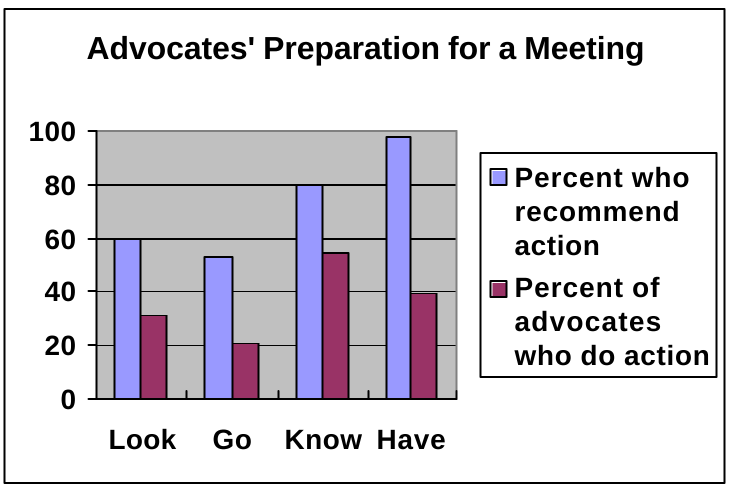
Less than 25%	70%
25-50%	4%
50-75%	9%
75% and up	4%
Other	13%

Know something about the district

Less than 25%	21%
25-50%	25%
50-75%	21%
75% and up	25%
Other	8%

Have organized their information so it can be presented in five minutes

Less than 25%	46%
25-50%	25%
50-75%	17%
75% and up	13%
Other	0



Note: The "percent of advocates who do action" is an average of the individual answers listed in Question 11, and the "percent who recommend action" is taken from the responses in Question 10. The graph is to show the relationship between the importance of the action and how many advocates actually do the action.

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[7] Responses in the Other category: "Know legislator's record on their issues." "Choose one spokesperson in the group." "Know what they want and be clear in communicating it
What specifically do you want us to do?" "Update me on previous requests & outcome."
"Relate your issue to the district."

[8] All responses in the Other category for Question 11 are: "Don't know." "Not sure."

12. Do you have any other tips, advice, comments or complaints for advocates? (Categories derived from responses.)

District Relevancy

"Send people from the Congressman's OWN District. Don't say someone from our district is coming just to get the appointment and then not have that person in the group. You'll never see the Congressman if you do that. We don't have time to play games figuring out who is coming. Feb/Mar/April are very tightly run and there's no room for error."

"Not to worry if the Member can't be at the meeting; if your info is relevant to the District, it will get to him/her. In essence: 1)know your topic and why you are talking to that member office 2)be brief…hit the key points immediately 3)leave clear simple info 4)specific District facts/examples left can be VERY important. (depending on issue of course), i.e. 4,200 people in your District are affected or over 3,000 jobs could be lost (but they'd better be factually accurate)"

"We are always glad to see constituents and hear their concerns. Other non-constituent lobbyists should do their homework first."

Dealing with Staff

"Even though the appointment is with the member, EXPECT to meet with staff only. 1) It will be a wonderful surprise should you get to meet with the Member. 2) The WORST thing you can do is act as though you are disappointed to be meeting with "just" me. Always have more copies of materials to be handed out than you think you could possibly need - you'll need them. Same goes for business cards. If you are prepared with materials on paper, please do not proceed to read directly from them word for word… all 12 pages. We know how to read, too, and can do that when you're not here. Hit your key points and move on. If your meeting with the member is part of a large group's annual or legislative meeting, etc., DON'T come in after your 'How to Lobby' session and say 'They told me to say that…' You sound as though you know nothing about the issue, and it makes it hard for us to feel that it truly affects you, our constituent. We have thousands of pieces of paper, and literally hundreds of meetings. FOLLOW-UP! If we haven't cosponsored, or signed on to the letter yet, it may very well NOT be because the Members said no, but because your materials were lost in the chaos."

"Be ready to talk on two levels: if I know a lot about your issue and if I know nothing."

"Brief updates are helpful."

Common Sense Tips

"Be patient!"

"Be practical."

"Just be persistent. It pays off!"

"Be concise, especially when making phone calls. It is difficult to have a political discussion over the phone while you have a pile of work on your desk. Know the number of the bill you are commenting on - check thomas.loc.gov for the information you are looking for before you ask us to find it for you. If you are not a congressman, don't call and ask to speak with the congressman himself, and get upset when he is no available. Have an appointment."

"Even if you disagree, make your point, but do so respectfully. Don't argue. Members of Congress generally respect constituents' points of view even when they differ. They will hear them out and look for areas of agreement, but they will seldom fundamentally change their views - or expect you to change your views."

Meeting Logistics

"Be brief and understanding if a meeting needs to be changed, and please, please don't just drop by and expect to get a meeting, always schedule before hand."

"Keep meetings short and to the point."

"Be on time. And not too early!"

"Make an appointment. Either fax or e-mail a request a week or two in advance."

"One meeting - per year - is PLENTY; no need to do return visits every month on the same issue."

"Please fax all scheduling requests by fax and follow up with an email instead of calling me 12 times to find out if I have received the request."

12. Do you have any other tips, advice, comments or complaints for advocates? (Categories derived from responses.) Continued…

District Relevancy

"Legislators offices are put off by organizations that come and meet with someone about an issue that has no effect on their district. Please do not waste your and my time."

"Advocates should always make sure to have a strong connection to the district before coming to see the member's staff. Home grown initiatives are always best."

Dealing with Staff

"When I ask for specific topics, I need specificity… not "educational issues," "health care" etc."

"Short and sweet is so important. It's not that we are trying to brush you off; it's that we have busy days. We'll get our boss all the info he/she needs. Trust me; this will make all the better impression for next year."

"Do not expect more than 20 minutes of my time, and do not expect to get to meet with the Member."

"Don't be insulted if you meet with staff instead of the Member of Congress."

"Always keep in mind what staff is thinking when you're visiting: Why are you here, what do you need from us and how is it relevant to the Congressman and the District? Is your request credible? If we do what you ask is this an easy win-win?"

"1-do not expect to meet with all members of a State delegation-if an advocacy group does not have reps from the Member's District, do not expect to take staff time for face-to-face meeting… 2-Do not send more than 3 representatives, 3-PLEASE PLEASE provide a 1 page executive summary of issues discussed for the Staff to pass on to the Member!!! 4-Do not call me and tell me what time you want to meet with me, tell me what day or days you are here and ask me what times I have available, understand that staff time is limited when the House is in session! 5-DO NOT DROP IN AND ASK IF I HAVE TIME TO SEE YOU! Call and leave me a voice mail and tell me why I should meet with you! If your issue relates to Member's agenda and his constituents, I will find time to meet with you!"

Common Sense Tips

"Don't preach to the choir! First, focus on the members that are in the middle of the issue. Only go to the people that already support you when you need them."

"Just that I wish they'd actually work an issue through facts and persuasion rather than the usual song-and-dance."

"Threats, haughtiness, etc do NOT work. This stuff takes time and patience to SUCCEED. If you don't have that, you'll fail."

"Use the KISS method, keep it simple stupid."

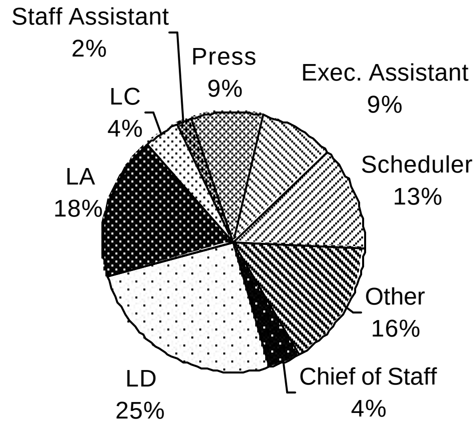
Meeting Logistics

"Please be *on time*. I continue to be surprised by how many people show up late for meetings. I'm often tightly scheduled, and being 10 minutes late often means I don't even have time to sit down with a group - just take their information in the front office. Also, showing up 25 minutes early for the meeting is inconvenient. We have limited office space, and if a group is camped out in the front office it can be very inconvenient for other groups trying to use the office. Get a cup of coffee or walk around the building instead of camping out in our office."

Survey Respondents Positions

13. What is your position in the office?

Chief of Staff	4%
Legislative Director	25%
Legislative Assistant	18%
Legislative Correspondent	4%
Staff Assistant	2%
Press	9%
Executive Assistant	9%
Scheduler	13%
Other[9]	16%



Survey Methodology

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[9] Response in Other category: "Policy director for a leadership office."