

A photograph of a grand, classical-style state capitol building. The central feature is a large, light-colored dome topped with a statue of a figure holding a torch. The building's facade is composed of numerous tall, fluted columns supporting a portico. A decorative frieze with a Greek key pattern runs along the top of the columns. An American flag is visible on the left side of the building. The sky is blue with scattered white clouds.

# Hosting a State Lobby Day

**A How-to Guide**

**IMPORTANT!** Before engaging in any activity involving legislators or state regulatory officials, be sure to check your state's ethics laws so you are aware of what activities are allowed to be conducted by your society and what may trigger specified filings with your state's lobbying regulators. Questions? Contact your society's practice attorney or AAOMS government affairs staff.



## Why Have a Lobby Day?

An effective way to reach out to legislators is through face-to-face meetings. Hosting a state society lobby day is one way for members to meet with their constituent elected officials to deliver the society's message on key issues of importance and advance the priorities of the specialty.

Hosting your own state society lobby day also provides more visibility for the state society and helps foster long-term relationships with elected officials, better positioning the specialty for major battles down the road.

The key to any successful lobby day is prior planning and organization. This document should serve as guideline for developing your own lobby day program.

## Timing

A number of considerations come into play when determining when to host your lobby day. Most importantly, you should host your event when the legislature is in session and preferably toward the beginning of the annual session to have a greater impact on your issues. Beyond this, you may want to check with your state dental association to determine if and when it is hosting its lobby day so as not to conflict.

After you determine an approximate week or month to host your event, you also will want to consider the legislature's weekly schedule. Many state legislatures either are not in session or start late on Mondays to allow legislators time to travel to the state capital. In addition, many states do not host legislative events on Fridays to allow legislators time to travel back to their districts. For these reasons, it may be beneficial to host your lobby day in the middle of the week to allow attendees a better chance of meeting with their elected representatives.

## Formats

There are several different available formats to host a lobby day. Typically, the meetings fall into two categories: standalone meetings or additions to larger CE or other organizational events.

Standalone lobby days can be more intimate, shorter in length and done very inexpensively while meetings held in conjunction with a CE or other organizational event lend themselves to a larger affair – requiring meeting room space, hotel rooms, and food and beverage costs.

Examples of possible schedules for your meeting are provided below. All formats have their pros and cons, and it is important for states to find a balance that works best for their members.

## Attendees

Once you have the basics of your event scheduled, you will want to determine who you would like to participate in your lobby day.

Inviting your entire membership is a good way to encourage a broad range of members to participate in advocacy for the specialty, but the more people who participate, the higher your operational costs. To cut back on costs, you can choose to limit your participants to society leadership and key invitees. This option helps to streamline both costs and messaging, but can be seen as elitist to other members.

You also may want to consider resident participation in meetings.

## Sample Event Schedules

### Half-day event

- Early morning – Have members meet at a centralized location in the capitol complex
- Morning – Legislative visits

### One-day event

- Early morning – Breakfast and issues discussion
- Mid-morning to mid-afternoon – Legislative visits
- Late afternoon – Reception and debriefing

### Day-and-a-half event

- Day 1 evening – Reception/dinner with legislators and speakers
- Day 2 morning – Breakfast and issues discussion
- Day 2 mid-morning to mid-afternoon – Legislative visits
- Day 2 late afternoon – Debriefing

### Two-day event

- Day 1 – CE or other organizational event
- Day 2 – Breakfast, issues discussion and legislative visits

### Virtual event

- Day 1 – Virtual reception with a speaker
- Day 2 – Virtual legislative meetings

## Location

Regardless of which format you choose, you will want to host your in-person meeting near the state capitol or within the capitol complex if allowed. This will make it easier for your attendees to move from your meeting location to their legislative visits and be more convenient for any legislators or staff to reach your meeting.

If you would like to host the meeting within the capitol complex, reach out to the staff of a state legislator or consult your lobbyist on the availability of such facilities.

Another option would be another association's headquarters if it has meeting facilities. Use of such rooms may or may not incur a rental fee.

In-person meetings are an invaluable way to connect and convey your message to a legislator. This is not always possible due to costs, resources or other outside factors, as evidenced by the COVID-19 pandemic. A great alternative is hosting your lobby day virtually. This can be done relatively cheaply through a video conference program such as Zoom, Microsoft Teams or Skype for Business. Alternatively, more sophisticated meeting platforms are on the market, but they come with a larger price tag.

## Budgeting

The actual cost of hosting a lobby day varies greatly and is based on the complexity of the meeting and the free services available through a state legislature. Some lobby days have been held for as little as \$200 but also can cost more than \$20,000.

If hosting a formal program with advanced training and discussion, you will need a facility to host these events. Hotels and association headquarters are ideal locations for this purpose, but you may incur a room rental fee. Alternatively, some state legislatures will allow state legislators to check out a room in the state capitol complex for meetings, often at no charge.

Virtual lobby days remove the costs associated with travel, event space booking and food and beverage. However, depending on the number of participants, meeting scheduling services as well as video technology and virtual meeting space software may be necessary.

If you are hosting your in-person meeting over a meal time, you will want to provide food and beverage to attendees. This will likely be your largest expense for the meeting. If you are not hosting a formal advanced meeting or training session, you can always ask attendees to gather at a location at or near the capitol complex, which will not incur any costs for the association.

Beyond the meeting space costs, expect to incur costs for attendee materials and information that will be left with state legislative offices. This could include black-and-white copying, color copying, custom printing and basic office materials.

Some costs could be offset by charging attendees a fee. However, this may deter participation. If costs are a concern, you may want to consider sponsorship, especially if the lobby day is held in conjunction with another association event.

## Speakers

If you are hosting a more formal lobby day program, you may find it beneficial to have speakers for your event, and there are several options available for societies:

- **Legislators** – Elected officials can speak on issues currently being discussed in the legislature.
- **Regulators** – Regulatory officials can speak on specific policy implementations and are beneficial for discussing a new state policy or licensure procedure.
- **Dental association staff** – Dental associations can speak on current legislative and regulatory trends.
- **Lobbyist/government affairs staff** – If your society is fortunate enough to have a lobbyist or government affairs staff, they can speak on issues participants will be advocating for during their meetings and specifics on the proposals.
- **Society president** – The society president can speak on the issues participants will be advocating for or current trends.
- **Paid speakers** – Secured through a speakers bureau, societies can contract with professional speakers or media personalities. These types of speakers usually come with a steep price tag.

It is important to recognize that if you are using a speaker outside your membership, you will need to be flexible and prepared for last-minute changes, particularly if using a legislator or regulator. Votes and last-minute events could delay your speaker or cancel the appearance altogether. Have a plan in place for such eventualities.

## Selecting Issues

Legislative meetings are typically no more than 15 minutes, so you will want to provide specific topics for your attendees to discuss during their meetings to help guide the discussion. Typically, no more than three issues can be discussed effectively in this short amount of time.

Choose legislation or issues to discuss that are timely and affect a large portion of your members or patient base. Also try to have a broad range of issues for attendees to discuss, with at least one issue that would appeal to members from each political party. Patient-related issues also are good lobby day topics, as legislators are typically more receptive to bills that affect their constituents.

## Preparing Attendees

To ensure a successful lobby day, states will want to provide their attendees with adequate training to ensure they are up-to-date with your issues, in compliance with your state's laws and effectively deliver your message.

States may wish to provide attendees with training on how to conduct a legislative meeting and what to expect. This can be provided through information distributed ahead of the meeting or through a face-to-face role play either through a demonstration or one-on-one interaction.

States also may consider providing attendees with advanced information regarding the lobby day issues and a time for Q&A with issue experts. This will allow attendees the opportunity to clarify their understanding of the issues and better deliver the message to their legislators.

It also is highly recommended that states provide participants information on do's and don'ts for their legislative visits, paying close attention to common legal pitfalls and how to ensure the society's message is delivered to the legislature. A sample grid of this information is provided on the following page, and states are encouraged to amend the information to fit their specific legislature and lobby day issues.

For virtual events, it is important to have your participants download and test the necessary video technology prior to the event. It may be useful to host a pre-meeting reception to familiarize participants on the format and technology. It also is beneficial to distribute a list of best practices for being on camera with meeting materials.

## Making Appointments

While the society may make appointments on behalf of attendees, it may be beneficial to have attendees make their own appointments. To facilitate this process, provide attendees a timeframe when appointments should be scheduled and a sample appointment request letter, such as the one provided on page 7 of this document.

Direct your attendees to reach out to their legislators' offices to inquire how they like to receive appointment requests — some offices may request an emailed letter while others may request a web form be completed.

Legislative offices will typically only want to have one meeting with your attendees, so it is important for multiple members with the same representatives to coordinate their appointments. Also, ideally it is beneficial to have newcomers accompany seasoned veterans to their legislative visits.

## Post-event Follow-up

Following up after your lobby day is important for cementing the efforts gained by hosting the meeting. Have your participants send notes to their legislators and their staff, thanking them for meeting and restating your priority issues.

Be sure to have your attendees complete post-meeting questionnaires to determine what follow-up is needed and where the opportunities are to further your issues. If a legislative office requested specific information, be sure to forward it as soon as possible.

Be sure to recap your meeting in your society's newsletter or through a blast email. Include pictures and quotes from attendees where appropriate so non-participants can see what they missed.

Finally, while the meeting is fresh, be sure to make notes about what worked well or did not work well for your lobby day. Having these notes is extremely valuable when improving your next lobby day.

**GOOD TO KNOW:** If you are unsure about hosting a lobby day, or if it is cost-prohibitive, consider hosting a virtual lobby day. AAOMS offers VoterVoice for use by state societies free of charge. This is the same system used by AAOMS for federal grassroots campaigns, and communications and distribution lists would simply be adjusted to meet states' needs. Contact AAOMS government affairs staff to set up campaigns on specific issues and organize your virtual lobby day!

## Virtual Meeting Tips

### Test Technology and Consider Location

- Ensure your internet connection is strong before the start of the meeting.
- Make sure there is little to no background noise.
- Make sure your entire face is in view of the camera.
- Ensure good lighting.
- Declutter your background.
- Familiarize yourself with the video platform and verify your camera and microphone work properly.

### Day of the Meeting

- Choose appropriate attire.
- Join the meeting a few minutes early.
- Turn off computer email notifications.
- Silence cellphone notifications.
- Mute yourself when you are not speaking.
- Turn off your video if you run into connectivity issues to allow others to stay engaged.



**GOOD TO KNOW:** AAOMS has resources available for state societies planning a lobby day. Reach out to AAOMS government affairs staff for more information or consultation on your own lobby day preparations.

## Sample Legislative Visit Do's and Don'ts

	<b>Do</b>	<b>Don't</b>
<b>Introductions &amp; Constituent Connection</b>	<ul style="list-style-type: none"> <li>• Address staff formally and with respect.</li> <li>• Be flexible and aware of changes in schedule – due to votes, hearings or other meetings running long.</li> <li>• Make constituent or personal connections.</li> </ul>	<ul style="list-style-type: none"> <li>• Assume a meeting with a staffer is less productive than one with a legislator.</li> <li>• Bring up campaign matters; it's illegal!</li> </ul>
<b>Who You Are, What You Do, Why it's Important</b>	<ul style="list-style-type: none"> <li>• Give a brief overview of oral and maxillofacial surgery and share personal experiences about what you see in your practice.</li> <li>• Stay on message. Pinpoint the purpose of your meeting and refrain from straying off-topic.</li> </ul>	<ul style="list-style-type: none"> <li>• Assume staffers know about oral and maxillofacial surgery or will feel slighted if you explain the profession.</li> <li>• Use medical terms or jargon.</li> </ul>
<b>Making the Asks</b>	<ul style="list-style-type: none"> <li>• Provide staff/legislator with leave-behind talking points to follow along.</li> <li>• Ask directly – but politely – for support/opposition.</li> <li>• Consider political party affiliation when discussing each issue.</li> <li>• Offer yourself and staff as a resource for additional information.</li> <li>• Provide contact information or personally connect them with staff via email.</li> </ul>	<ul style="list-style-type: none"> <li>• Press if they refuse to commit support/opposition or convey they are on the opposite side of the issue.</li> <li>• Argue with legislators or their staff.</li> <li>• Be afraid if they ask questions.</li> </ul>
<b>Closing &amp; Follow-up</b>	<ul style="list-style-type: none"> <li>• Thank the legislator and their staff for their time.</li> <li>• Remember to provide the leave-behind materials and your business card.</li> <li>• Ask before leaving if the legislator has a free minute to take a photo.</li> <li>• Send them a follow-up email, thanking them for their time and again offering yourself as a resource.</li> </ul>	<ul style="list-style-type: none"> <li>• Leave without their business card.</li> </ul>

**TIP!** Don't be afraid to tap into your state dental association for assistance in securing speakers or coordinating lobby days.



## Recommended Meeting Materials

To ensure your lobby day is successful and attendees are appropriately prepared, consider providing the following materials. Information can be presented simply via black-and-white copies and generic folders or in a more professional-looking medium, such as color copies with custom design.

For examples of any of these materials, please contact AAOMS government affairs staff.

### **For attendees**

*Provided prior to the lobby day via email or a website*

- Program agenda
- Bullet points or specifics of priority issues for use during discussions
- Information on how to schedule a legislative visit
- Biographies of legislators or information on where to access such information
- For a virtual event, instructions on how to download and log in to video technology
- For a virtual event, a list of tips for being on camera

### **For attendees**

*Provided during the lobby day in a folder to carry to meetings*

- Bullet points or specifics of priority issues for use during discussions
- Do's and don'ts for legislative meetings
- Maps of the capitol complex
- Biographies of legislators or where to access such information
- Key contact information
- Meeting evaluation forms

### **For legislators/staff**

*Left in each office*

- Information about oral and maxillofacial surgery
- A one-page explanation of priority issues with position statements or requests for specific action
- Contact information for society's lobbyist or staff if there are additional questions
- For a virtual event, instructions on how to download and log in to video technology

## Sample Appointment Request

Legislative offices will typically need a few specific details to schedule a meeting, including:

- When the meeting is requested to be held.
- Who will be attending.
- Why the meeting is being requested.
- What will be discussed.

Providing your attendees this information through a sample appointment request, such as the example provided below, will streamline the scheduling process and eliminate the guess work for your members.

### Your Letterhead

<Date>

<Legislator's Address>

<Legislator's Address>

<Legislator's Address>

Dear <Senator or Representative/Assemblyman>:

I am an oral and maxillofacial surgeon and a constituent participating in the <Society's Name> lobby day. I will be at the state's capitol for meetings with my elected representatives on <meeting date>.

I would like to request an appointment to meet with you or the appropriate staff member to discuss issues affecting how oral and maxillofacial surgeons in your district are able to provide care to patients. I would like to request a meeting between <time> on <date>.

Specifically, I would like to discuss:

- <Priority issue 1>
- <Priority issue 2>
- <Priority issue 3>

Thank you for your consideration of this request. Please contact me at <phone> or <email> to finalize an appointment time. I look forward to the opportunity to meet with you and to discuss the legislative priorities of the specialty.

Sincerely,

<Name>

<Address>



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