

# Training Manual

## Information for effective advocating

2012 LEGISLATIVE SESSION

The New York State Retired Teachers' Association, Inc.

## **NYSRTA Legislative Network Information for Effective Advocating**

The New York State Legislature has **total control** over those issues that are critical to education retirees – namely, cost of living raises, adequate funding for health insurance and the Teachers' Retirement System, exemption of retirement income and Social Security from state income taxes, and many other issues requiring legislature action. To sum it up, education retirees are **totally dependent** on the State Legislature for their financial, health care and consumer welfare.

This dependency, therefore, requires that education retirees have an effective voice and appropriate influence with members of the State Legislature. The New York State Retired Teachers' Association, Inc. and the Retired Public Employees coalition represent a very effective means of bringing that voice and influence to bear.

The collective voice of both retiree groups provides the most effective way to influence the legislative process. The NYSRTA/RPEA membership coalition now makes that collective voice a reality. Instead of the influence of only 24,850 + RPEA members, the coalition brings the combined influence of over 85,000 members to bear.

However, for the purposes of this activity, we will deal only with the NYSRTA advocating network as it reflects the established organizational structure of the association. The network and its component parts represent the organization and the systematic planning that must work if the needs of education retirees are to be both protected and improved.

The **specifics of the advocating network** are presented on the following pages. Each individual assigned a responsibility in the ten zone networks must execute that responsibility promptly and effectively in order to guarantee success. Careful review and study by the zone chair leadership is recommended so each member involved clearly understands:

- 1) The issue involved
- 2) The proper lobbying techniques
- 3) The response process

## What is Advocating

Advocating is the organized effort of individuals and groups to influence the political decisions of elected officials for a particular purpose. More specifically, advocating is nothing more than **the effort to persuade** the members of a legislature, whether city council, commission, state legislature, or United States House of Representatives or Senate, to enact legislation favorable to your cause or, on occasion, defeat or repeal legislation unfavorable to your cause.

## Why Advocate?

Anyone who can make a phone call or write a letter can advocate. We advocate, in a loose sense, every time we debate an issue and try to persuade someone to our position. We advocate much more than we realize in everyday situations. If you believe in some cause or have strong feelings about an issue, by all means you should advocate.

Undoubtedly different individuals could list many reasons why advocating is necessary. However, when they are all assessed they seem to come down to **two basic reasons**:

1. Virtually every aspect of our lives, every institution, and every activity is **affected by government**. This is particularly true of the State Legislature as it relates to programs for education retirees. The State Legislature is pressure-sensitive and will respond to needs if the effort is made to contact them in an effective manner. Complaining about it and wishing for it will not make it happen. It takes organized and persistent action.
2. The second reason you should advocate is because **if you don't, someone else will**. That "someone else" may take a position that is contrary to and harmful to your interest. Advocating today is a must. Virtually every interest seems to be represented by an organization. Any organization that does not advocate, or an organization that does not advocate effectively, is almost certain to be left out.

## Effective Advocating

The effective communication with legislators is primarily based on establishing good relations. The relationship may be based on personal friendship, family ties, political assistance, financial support, or even having worked as a former teacher to a legislator.

It is important to nurture that relationship particularly during the period of time when you “don’t need them”. Even a good relationship can be diminished if contact is limited to occasions only when you need them legislatively.

Since you as an individual member representing The NYSRTA, as well as your zone and local unit can not financially contribute to their campaign for election or reelection, other effective resources must be found to gain political influence. There are a number of effective ways education retirees can gain and nurture and effective relationship with legislators.

- Invite them to a zone or unit meeting with an opportunity to speak and be recognized.
- Have a special luncheon to honor your legislators such as a “Legislator Appreciation Day”.
- For any occasion when your legislator(s) are recognized and honored, make sure the press is invited to cover the event and an article is written for York State and a copy is mailed to them.
- When the legislators are home, call and invite them to breakfast or lunch with two or three zone or unit members. Light conversation—no heavy political talk.
- Get to know the legislator’s spouse and family, if possible. Personal friendship with the family is a powerful resource.
- Send them a Christmas card, birthday card, etc.
- Clip newspaper articles referencing them and mail them a copy along with a handwritten note.
- At the conclusion of a legislative session, mail them a short letter thanking them for their public service.
- Work in their campaign for reelection
  - Help raise campaign contributions
  - Host a tea or coffee
  - Work on a telephone committee
  - Work in campaign headquarters
  - Mail postcards expressing your support of the candidate to friends

The opportunities to be a friend and supporter are numerous. All you have to do is take the initiative. The good you do in building a sincere caring relationship will pay dividends when you need them. It is particularly true in politics that the legislators remember those who help them.

# Political Resources for Advocating

The effectiveness of an advocate is dependent on the type of **political resources** he/she possesses. **All advocates have some resources.** Some advocates have a greater number of resources and more powerful resources than others. When we talk about political resources, we are generally talking about either **tangible or intangible resources.**

## **A. Tangible Political Resources**

Classified as tangible resources are substantive benefits such as political contributions, finances for entertainment, and any other number of benefits resulting in something of substance accruing to the legislator which might have an influence on him/her.

Since The NYSRTA does not use any of its financial resources for political purposes and does not have a PAC or endorse candidates for political office, the Association utilizes none of the typical tangible resources. Individual NYSRTA members may choose to contribute their own tangible resources to political candidates, but they cannot claim they represent the organization.

## **B. Intangible Political Resources**

Classified as intangible political resources is a range of resources that include time, personal commitment, political independence, friendship, emotion and sentiment, respect, and perception of organizational influence. Now, The NYSRTA and its members have an abundance of these resources that are very powerful. Let's briefly examine these resources as they relate to NYSRTA and its members.

### 1. Time:

We certainly have time to get involved; to write a letter, make a phone call, or to go see a legislator personally.

### 2. Personal Commitment:

We should have a strong personal commitment to secure cost-of-living increases, improve our health insurance and to protect the fiscal soundness of the TRS.

### 3. Political Independence:

Since we are no longer employed, we don't have to worry about the political impact of what we say or do. We can tell it like it is, respectfully!

### 4. Emotion and Sentiment:

We have loyally and steadfastly labored in the trenches over the years under less than ideal working and financial conditions, and are viewed somewhat sentimentally by legislators. It is hard to say no to elder statesmen and stateswomen who have "paid their dues".

### 5. Respect:

We taught many of the legislators as students. Teachers have historically enjoyed great respect and that respect is accorded to NYSRTA members.

### 6. Percentage of Retirees Who Vote:

It is a well known fact that a much higher percentage of retirees vote on average than other voters. This fact represents a reality of which members of the State Legislature are well aware.

### 7. Organizational Influence:

The NYSRTA is over 22,000 members strong and the RPEA coalition membership increases that number to over 85,000. We are perceived as having clout and the willingness and capability to use it. Elected officials respond to perception as much as reality. When they respond to perception, it in fact, becomes reality.

# **What Influences a Legislator's Vote?**

Most legislators believe that they should vote on bills in terms of the wishes and best interests of their constituents. However, there may be other factors that come into play particularly when the legislator may not be clear as to what the majority of the constituency favors. Here are some of the factors that may influence a lawmaker's vote.

## **Views of the Constituency**

As a matter of principle and because of the desire to remain in office, legislators must give this factor primary consideration. On important and controversial measures, legislators will make an effort to determine constituents' views. He/She may talk to community leaders, send out opinion questionnaires, solicit views of important organizations and pay particular attention to lobbyists representing local interest.

## **Views of Other Legislators**

The views of experienced legislators, those with expertise on the subject, and the views of legislators from the same or surrounding districts may be important.

## **Degree of Controversy Over the Bill**

Some bills are more controversial than others and the legislator will have to give closer attention to his/her vote when such bills are under consideration.

## **Degree of Impact on State and Local**

Certain bills may have significant and far reaching consequences for the social and economic welfare of the state or district and will require careful consideration.

## **Advocates**

An Advocate's function is for the purpose of influencing legislators' votes. They can also provide the legislator with important information that he/she may need to make a decision. They will attempt to convince the legislator that he/she should vote in a way that is in their best interest.

## **Political Consequences**

Views of the district voters have to be taken into consideration in terms of the prospects for reelection. Also, the position of the political party or faction with whom the legislator is affiliated must be considered.

## **Personal Point of View**

The legislators' own convictions may conflict with the views of the constituents and the party position, and must be carefully considered in terms of the final decisions.

## **Financial Considerations**

The cost of the bill may be prohibitive so that even though other factors may be in alignment the legislator may decide to register a dissenting vote due to the exorbitant cost of implementing it.

# Procedures for The NYSRTA Legislative Network

## **For a network to be effective**

- 1) it must be simple enough to be understood
- 2) it must have committed leadership
- 3) it must be executed
- 4) it must be pursued to completion

## **Key to The NYSRTA Legislative Network is the initiative and leadership of the**

- 1) Vice President for Legislative Action
- 2) Zone legislative Action Chair
- 3) Zone President
- 4) Unit President

## **The political truism that applies is that the votes of legislators are determined**

Before presenting the steps in the Legislative Network, it is necessary to identify the various:

✿ Vice President for Legislative Action – is an elected position and has the responsibility to follow the Bylaws set forth in Article V, Section 5 of the NYSRTA Presidents Handbook.

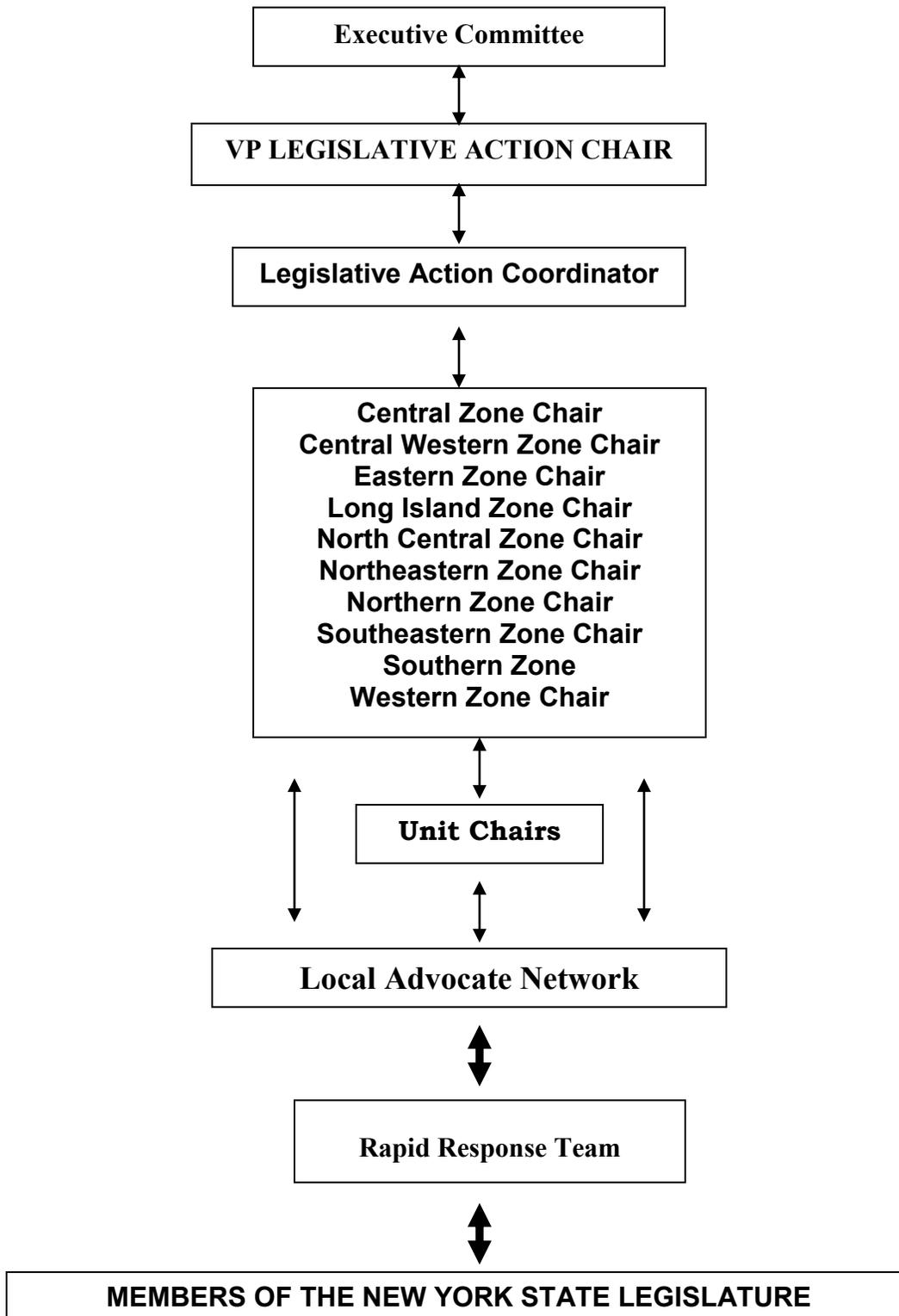
✿ Zone Legislative Action Chair – is an elected position and has the responsibility to follow the Bylaws set forth in Article V, Section 5 of the NYSRTA Presidents Handbook. Zone Chairs are responsible for finding willing lobbyists from each county in their zone and for providing those lobbyists with the training and information needed to be successful lobbyists. Lobbyists that agree to lobby on the local level will be required to make a personal contact, written correspondence, e-mail, or telephone and be responsible for returning a Legislative Reaction Sheet per each contact.

✿ Unit Legislative Action Chair – is an elected position and has the responsibility to follow the Bylaws set forth in Article V, Section 5 of the NYSRTA Presidents Handbook. The local unit president or local legislative chairperson has the responsibility for receiving the information from the Zone State Legislative Chair, activating the local network members, securing the legislative responses from the local network members and communicating the responses to the unit contact person.

✿ Legislative Network Members – zone members who have accepted the responsibility for contacting and advocating legislators in their county, who they know personally and who will communicate the responses to the zone chair.

The flow chart and the specific steps in the Legislative Network are presented on the following pages

# NYSRTA LEGISLATIVE NETWORK



# Steps in the NYSRTA Legislative Network

## **Step 1 – LEGISLATIVE INFORMATION TO ZONE / LOCAL UNITS**

IF TIME IS NOT A FACTOR, the NYSRTA VP for legislative Action or Albany Office identifies a concern and mails /e-mails information to:

- 1) Legislative Action Committee
- 2) Unit Chairs – Unit Presidents

IF TIME IS A FACTOR, the NYSRTA VP for Legislative Action or Albany Office may see that the contacts are made by phone.

The information will identify:

- 1) the issue
- 2) the type of action necessary
- 3) the time frame for a response

## **Step 2 – ZONE / UNIT ACTIVATES ADVOCATING NETWORK**

### **Per Request from the VP for Legislative Action or State Office**

The **Zone Chairs** activate the **key legislative network members** to immediately execute the action recommended.

- 1) Each unit identifies one local member for each legislator to serve as a **legislative network member**. The local members must be a constituent, know the legislator personally and be in a position in that relationship to influence his/ her vote on legislative matters important to NYSRTA.
  - ❖ Some legislative network members may want to be responsible for more than one legislator.
  - ❖ The **zone Legislative Action chair** and **unit legislative chair** must serve as a **legislative network member**.
- 2) A local member must be assigned to every legislator regardless of whether he/she represents only a small portion for the county.
- 3) The legislative network members must be willing participants in the legislative network and commit themselves to promptly execute their contact with their legislator(s) when requested.
- 4) The legislative network members must be familiar with the issue, know how to ask the question for support and ask for a commitment (SEE: Personal Contact).
- 5) If the legislative network members are not available to make the legislative contact(s), the contact must be made by the zone or unit legislative chairperson.

6) Some legislators can be effectively advocated by a single contact from the **legislative network member**, while some may be more difficult requiring multiple contacts. In anticipation of the need for multiple contacts, each unit must identify and organize **5 to 10 key members** who will be willing to:

- (a) phone or write the non-supportive / undecided legislators to put pressure on them and
- (b) serve as a telephone committee to contact other members when the importance of the issue dictates the lobbying effort be expanded.

7) The **legislative network members** secure a response from their legislator and communicate it to the zone chair who then forwards to the VP Legislative Action Chair then onto Albany Office.

### **Step 3 – LEGISLATIVE RESPONSES COMMUNICATED TO ZONE LEGISLATIVE ACTION CHAIR**

After the recommended contacts have been made with the legislator(s), the Legislative Reaction Sheets collected by the legislative network members are promptly sent to the Zone Legislative Action Chair. The turn around time will be identified in the original communication from the Albany Office.

### **Step 4 – LEGISLATIVE RESPONSES COMMUNICATED TO VP LEGISLATIVE ACTION CHAIR**

The Legislative Reaction Sheets collected by the **Zone State Legislative Chairs** are forwarded to the **VP Legislative Action Chair** for his / her documentation.

### **Step 5 – LEGISLATIVE RESPONSES COMMUNICATED TO STATE OFFICE**

The **VP for Legislative Action** forwards the Legislative Reaction Sheets to the **Legislative Action Coordinator** for documentation and filing.

- ❖ Each **Zone Legislative Action Chair** will be responsible for securing the Legislative Reaction Sheets from their unit legislative network members.
- ❖ Each **Zone Legislative Action Chair** will be responsible for follow-up communication with the zone unit chair to encourage additional contacts with legislators if a significant number of them were missed on the first contact effort.

### **Step 6 – ALBANY OFFICE RESPONSE TO LEGISLATIVE REACTION SHEETS**

The **Albany Office** reviews the reaction sheets and determines the legislative support for the NYSRTA position.

- ❖ If follow-up advocating needs to be done on a particular legislator(s), the Albany Office will notify the appropriate zone chair.
- ❖ The follow-up advocating may require the multiple contacts explained in Step 2, Items 6.
- ❖ When appropriate, the **Albany Office** will distribute a summary of the advocating effort to all parties involved in the process.

### **Step 7 – PERSONAL ADVOCATING AT THE LEGISLATIVE OFFICE BUILDING**

The VP Legislative Action or the Albany Office may need assistance from **selected local members with personal advocating where a committee vote or a House or Senate vote is close.**

- ❖ These personal advocating efforts will be directed at legislators who are uncommitted or who are not supportive
- ❖ A written or telephone request will be sent to local units encouraging **key local members** to come to Albany to assist with the continuing advocating efforts with legislators whose position is in question.

### **OR**

- ❖ The Albany Office will organize a general rally at the Legislative Office Building regarding important legislative issues and request maximum member participation through the zone units. Please note that NYSRTA will conduct a Retired Educators Legislative Action Day date to coincide with the New York State Legislative Session, January – June.

### **Step 8 – EVALUATION OF RESULTS**

When the particular legislative action has been completed, the **Albany Office** will carefully evaluate the results and effectiveness of the network lobbying efforts.

- ❖ If a legislative action on the issue of concern has ended, the evaluation will be mailed to the VP of Legislative Action. The VP of Legislative Action will forward results to Zone Legislative Chairs and Unit Chairs.
- ❖ However, if the legislative action is only one phase of a continuing process, the **Albany Office** will continue the advocating process by activating the network again at the appropriate time.

## **Types and Effectiveness of Communication**

### **A. Personal Contact**

1. The most effective means of communication is person contact.
2. Personal contact provides you with the undivided attention of the legislator during the discussion.
3. Personal contact permits you to express your concerns in a sincere and persuasive manner. It also provides the opportunity to read the legislator's true concerns. Insincerity can be identified very easily.
4. Personal contact makes it more difficult to refuse a request for a personal commitment.
5. Always call for an appointment. Surprise visits can result in negative feelings. Limit the number in your group to two or three to avoid the appearance of "ganging-up".
6. Meet with the legislator at his/her convenience. He/she is busy and has many demands. Plan to cover your topic in a reasonable amount of time. Do not linger unless the legislator chooses to prolong the meeting.
7. Unless you are a personal friend, always introduce yourself even at the second, third or fourth meeting. Don't put your legislator in an awkward position of having to ask your name or having to bluff his/her way through the meeting without calling you anything. Remember to wear your name badge and state that you are there representing your retired colleagues and The New York State Retired Teachers' Association.
8. Unless you are a personal friend, show the legislator respect by referring to him/her as Assembly (man/woman) or Senator.
9. Leave with the Assemblyperson/Senator and or Aide a copy of the NYSRTA Campaign Card of the issue. The Albany Office will supply you with as many as needed.
10. Review the Campaign Card with the legislator. Make it easy to support our position by providing good reasons, cost and number of retired individuals affected.
11. Be truthful and factual. Don't exaggerate the effects of the bill or use scare tactics. Obviously, using the worse case scenario to support our position is appropriate.
12. It helps to be generally informed about any opposing view to our position. The legislator will be impressed that you have done your homework.
13. If there are identifiable opponents to our position, do not criticize them. Address only the constructive aspects of our position.
14. Respond to questions. However, if there are questions you can't answer, admit it and provide the answers later. Don't bluff – it always shows.

15. You must have strong convictions regarding our position and must hold firm to them. Politely, but firmly, restate the key points of our position if the legislator expresses an opposing view. Above all else, do not let him/her lobby you out of our position.
16. Don't be argumentative – be reasonable, courteous and persuasive. Don't win an argument and lose a vote. Above all else, do not threaten.
17. Ask for a personal commitment to support our position. If you don't ask for one, you surely won't get it. You may want to say: **"This issue is very important to NYSRTA. May I tell our local members that we have your support?"** Or, you may want to say: **"The education retirees in this county have always supported you. They now need your help. Can we count on your support on our issues?"**
18. If the legislator agrees to our position, you may want to express your appreciation by saying: **"Thank you for your support. I'll certainly inform our members. I know they will be glad to know of your support."** This helps to lock-down the commitment. If he/she is opposed, you might want to say: **"I regret that we cannot count on your support. I'm sure our members will be disappointed."** This conveys a subtle message that you plan to inform your county members of his/her position.
19. If the legislator is undecided and tells you he/she is not familiar enough with the issue or needs more time to study it, you may want to comment: **"We understand your position. In order to assist you better in understanding the issue or reaching a decision, may we provide you with additional information?"** Also, you certainly should ask: **"When can we expect that you will have reached a decision? We would like to get back with you at that time. We very badly need your support."** Do not permit him/her to stiff arm you. It is appropriate to be politely persistent until you get a definite yes or no.
20. Following the meeting, write a note of thanks. The note should include a summary of the discussion and the written documentation of the position the legislator took on the issues.
  - (a) If he/she supports our legislative agenda or any portion of, write a thank you note follow-up letter. **(see Appendix A)**
  - (b) If he/she does not support a portion of our agenda, write a thank you note follow-up letter for the time, courtesy and consideration. **(see Appendix B)**
  - (c) If he/she is undecided, write a thank you follow-up letter for meeting with you. **(see Appendix C)**
21. If the legislator supports any of our agenda during the legislative process, make sure you express written thanks and generate additional letters from the local unit.

## **B. Phone Calls**

1. The second most effective means of communication is a telephone call.
2. Phone calls are important because personal visits are not always possible.
3. Call at a time when you have reason to believe the legislator is available. Do not call late in the evening and try to avoid meal time. Unless you are a personal friend, show the legislator respect by referring to him/her as Assembly (man/woman) or Senator.
4. If you call the legislator at work, try to determine in advance that legislative calls can be received at work.
5. Prior to making the call, prepare written notes containing the information you want to convey and the essential points you want to make. These notes will give you structure and prevent unnecessary detail and digressions.
6. Don't begin your conversation with an apology for interrupting the legislator, remember, he/she is **YOUR ELECTED** representative and should not object to your call.
7. Identify yourself, your organization and ask if it is convenient to discuss our legislative issues with him/her. If it isn't, ask when you may call back.
8. When the legislator accepts your call, identify the issues or the legislative bills by number and topic.
9. Briefly state our position on the issues or bills and provide a justification of our position by providing the essential facts. Use your "Talking Points"
10. Be truthful and factual. Don't exaggerate the effects of the bill or use scare tactics. Obviously, using the worse case scenario to support our position is appropriate.
11. It helps to be generally informed about any opposing view to our position. The legislator will be impressed that you know the facts and have done your homework.
12. If there are identifiable opponents to your position, do not criticize them. Address only the constructive aspects of our position.
13. Respond to questions. However, if there are questions you can not answer, admit it and provide the answer later. Do not bluff – it always shows.
14. You must have strong convictions regarding our position and must hold firm to them. Politely, but firmly, restate the key points of our position if the legislator expresses an opposing view. Above all else, do not let him/her talk you out of your position.

15. Don't be argumentative – be reasonable, courteous and persuasive. Don't win an argument and lose a vote. Above all else, do not threaten.
16. Ask for a personal commitment to support our position. If you don't ask for one, you surely won't get it. You may want to say: **"This issue is very important to NYSRTA. May I tell our local members that we have your support?"** Or, you may want to say: **"The education retirees in this county have always supported you. They now need your help. Can we count on your support on our issues?"**
17. If the legislator agrees to our position, you may want to express your appreciation by saying: **"Thank you for your support. I'll certainly inform our members. I know they will be glad to know of your support."** This helps to lock-down the commitment. If he/she is opposed, you might want to say: **"I regret that we cannot count on your support. I'm sure our members will be disappointed."** This conveys a subtle message that you plan to inform your county members of his/her position.
18. If the legislator is undecided and tells you he/she is not familiar enough with the issue or needs more time to study it, you may want to comment: **"We understand your position. In order to assist you better in understanding the issue or reaching a decision, may we provide you with additional information?"** Also, you certainly should ask: **"When can we expect that you will have reached a decision? We would like to get back with you at that time. We very badly need your support."** Do not permit him/her to stiff arm you. It is appropriate to be politely persistent until you get a definite yes or no.
19. You may want to ask for an appointment to discuss the details with him/her in person.

### **C. Letters**

1. Letters are particularly important when time is not a critical factor.
2. Letters provide documentation that our position has been communicated to the legislator.
3. Along with your letter include a copy of our Campaign Card.
4. However, letters are usually less effective than personal communication unless they are written effectively and received in large enough numbers. Usually 10 to 15 well written personal letters will have a major impact on a legislator.
5. For greatest impact, your letter should be typed or written neatly. A handwritten letter should not exceed two pages while a typed letter should be limited to one page.
6. Use organizational stationery if it is available and appropriate.
7. Do not send a form letter or postcard because they have little or no impact.
8. Be absolutely sure you spell your legislator's name correctly and get the address right. If you don't, he/she may wonder how credible the rest of the letter is. Legislative Guides will be provided to all legislative network members.
9. Identify yourself as a constituent, your organization and, if you are one of his/her supporters, you may want to identify the fact.
10. It might be helpful to mention the number of education retirees in the county if it can be done skillfully and without being interpreted as threatening.
11. Following your personal introduction, move directly to identify the issue or, if a bill, the number, its purpose and its effects.
12. Clearly identify our position and the position we want him/her to take.
13. Use your own words. Express your views as concisely as possible. When the subject justifies, heartfelt pleas are exceptionally effective.
14. Be truthful and factual. Don't exaggerate the effects of the bill or use scare tactics. Obviously, using the worse case scenario to support our position is appropriate.
15. As you close your letter, be sure to express the hope that he/she will support our position on the issues. Request a reply to your letter indicating his/her position.
16. Remember to include your correct name and mailing address for the response.
17. If you receive a response, forward the response to your zone legislative chair. If you do not receive a response in a timely fashion please follow up with a personal contact.

18. If time permits, it is always sound to schedule an appointment as a follow-up to the letter. This request may be made in the letter so he/she will be expecting your call.
19. The personal visit should include the appropriate recommendations included under the section of this document labeled, **PERSONAL CONTACT**.
20. If the legislator supports our position during the legislative process, make sure you express written thanks and generate additional letters from your local unit.

# APPENDIX A

## Suggested Organization for Follow-up Letters from Personal Visits or Telephone Calls to Legislators

### Support

Dear Assembly (man/woman) or Senator

#### Opening

- ★ Express thanks for meeting with you or your group on (date) or talking to you by phone on (date).
- ★ You may want to express general appreciation for his/her willingness to seek public office and serve the people in the district.

#### Body of Letter

- ★ Review the issues, concerns or bills you discussed.
- ★ Mention the importance of the issue to you, your local unit and educational retirees in general.
- ★ Express gratitude for his/her commitment to support our position.
- ★ Comment that you will let your local members know of his/her support.

#### Closing

- ★ Express appreciation for the receptivity to you and your concerns.
- ★ Request that he/she contact you if there are questions or additional information is needed.

# APPENDIX B

## Suggested Organization for Follow-up Letters from Personal Visits or Telephone Calls to Legislators

### OPPOSITION

Dear Assembly (man/woman) or Senator

#### Opening

- ★ Express thanks for meeting with you or your group on (date) or talking to you by phone on (date).
- ★ You may want to express general appreciation for his/her willingness to seek public office and serve the people in the district.

#### Body of Letter

- ★ Review the issues, concerns or bills you discussed.
- ★ Mention the importance of the issue to you, your local unit and educational retirees in general.
- ★ Express regret that he/she is not supportive of our position. You may want to state that the (use numbers) members of your local unit /state will be disappointed when they learn that he/she is not supporting your position.
- ★ Compliment him/her on past support, if any, and express the hope that he/she will be supportive of other issues in the future.

#### Closing

- ★ Express appreciation for the receptivity to you and our concerns.
- ★ Tell him/her you look forward to working together on other matters in the future.

# APPENDIX C

## Suggested Organization for Follow-up Letters from Personal Visits or Telephone Calls to Legislators

### UNDECIDED

Dear Assembly (man/woman) or Senator

#### Opening

- ★ Express thanks for meeting with you or your group on (date) or talking to you by phone on (date).
- ★ You may want to express general appreciation for his/her willingness to seek public office and serve the people in the district.

#### Body of Letter

- ★ Review the issues, concerns or bills you discussed.
- ★ Mention the importance of the issue to you, your local unit and educational retirees in general. You may want to subtly mention the number of educational retirees in your county or the total state membership.
- ★ Express gratitude for his/her commitment to support our position.
- ★ Recognize there are many complex issues and state that you understand his interest and need to secure adequate information before making his decision.
- ★ Offer assistance if additional information is needed regarding our position.
- ★ Express your hope that he/she will be receptive to another contact in the near future to determine his/her position.
- ★ State that you would eventually like to tell your local members (use numbers) that he/she is supportive of our position.

#### Closing

- ★ Express appreciation for the receptivity to you and our concerns.
- ★ Tell him/her you look forward to working together on other matters in the future.