Making Lobby Meeting Appointments with Politicians

Introduction

The purpose of this document is to assist Citizens' Climate Lobby (CCL) volunteers meet with politicians by phone, via a Zoom meeting, in MP's offices or at an agreed location.

The first aim of a lobby meeting with a politician is to introduce CCL or remind them who we are and our strong support for a price on carbon. The intent is to form an ongoing, positive and supportive relationship. The second aim of the lobby meeting is to discuss effective climate change solutions, ask for their support and ask them to do something that we think will engage their interest and increase their support for effective climate policy, preferably a carbon price.

In addition to our primary ask, CCL has a number of "Supporting Asks" that volunteers can select from as the most appropriate for the specific politician (current CCL.au Asks document link). Meetings with members of parliament are mostly made with a small team of CCL volunteers with at least one member who has experience with MP lobby meetings. Contact your CCL regional coordinator if you need the support of an experienced lobbier.

This document is also relevant for meetings with non-politicians who may be able to have an influence on efforts to reduce GreenHouse Gas (GHG) emissions. Just replace 'politician or MP' with 'influential person' in the text. Any CCL volunteer has permission to organise a meeting with a politician or influential person, as long as they follow the CCL lobbying approach (CCL lobbying approach pdf) (CCL lobbying approach Video).

Meeting Resources *(Please keep files secure and within CCL)*

Citizens' Climate Lobby (CCL) keeps MP Bios and a wide range of other documentation on our Google Drive and stores its records of meetings, called Field Reports, in a secure system run by CCL US. It is very important to keep Field Report information secure as our discussions with politicians have to be kept confidential.

The CCL MP's Bio Folder is used to keep a record of those bio's generated for MPs for past meetings as well as those prepared for those MP's CCL has not had a meeting with yet. The bio's are used to assist in planning the meetings with MP's to identify the best way to form a positive relationship with the MP and leads to a high level of sustained trust. A blank Bio-template can be found in this folder. If you have problems getting edit access to CCL Google Drive Bio's, contact your CCL regional coordinator. Field Report numbers from previous meetings should be recorded in the MP Bio Document. If you need a copy of previous MP meeting field reports contact Howard@ccl.org.au.

Select the Politician to Meet

It is suggested you review CCL's list of Supporting Asks and select one or more issues you would like to influence. Select the politician that you would like to take some action on your issue/s. You are encouraged to send the person an email message requesting them to take action on your selected issue/s. If you want to maximise the likelihood of the person taking action on your issue/s the most effective approach is to have a meeting with them.

Building your Meeting Team

CCL's usually has between Two to Five people attending a formal MP meeting. If you are not experienced with leading lobby meetings contact your CCL regional coordinator to nominate a lobby team advisor who can participate in the meeting. Identify people who may be interested and available to attend a meeting with your selected person on the issue/s you have chosen. You can ask your CCL regional Coordinator or your electorate group leader for the list of CCL members and their phone numbers in your area. Ensure you tell first time lobbyists how easy lobbying will be for them as there are roles like timekeeper and note taker that does not involve much talking. You can invite non CCL members as long as they are happy to follow CCL's meeting approach.

For your selected team, find out each of their general time constraints for attending the meeting. Call the person's (MP's) office (you will usually speak with office staff), say who you are, ask which email address to send a meeting request to, what generally are the most likely available meeting times and if they have a meeting room available to fit your team. If they do not have a meeting room ask for their suggestion of a good location for a meeting. If you can, record the name of the person you spoke to and the time. Unless you already know the person you are talking to, don't try to start a conversation as politician office staff are generally very busy and they usually respect short to the point phone calls. If it is practical, it may be an option to obtain the same information by dropping into the politicians offices. For federal and state politicians it is good to have the parliament sitting calendar available to see when they will not be available (Federal sitting Calendar).

Meeting Request

Your email meeting request should be short and to the point and should be less than one page long if printed.

1. **Modify** the following example of an **Meeting Request Email** to suit the situation and send it. Record the date and exact send time recorded in your email system and the email address used if you have multiple email addresses.
2. If there is no personal non-automated reply to the email (there usually is not) follow up with a phone call after one or two days just to confirm the email was received (quote the day and exact time it was sent and your email address to make it easy for them to find) and was forwarded to the right person (often a diary manager) or into the right system. “Hi my name is XXX from Citizens' Climate lobby and I would like to confirm you received my email meeting request sent at XXX (eg Wednesday at 7.25pm) and that it got through to the appropriate person”. Listen and record what they say, especially if they say something about how they manage meeting requests, who manages requests and when meeting requests are next reviewed. Some politicians have someone who manages their diary so getting that person's name and phone number is the ideal. If they just confirm it has been received say “Ok I will ring back in a week (or a month or

whatever you think is appropriate from what is said) to see how its going". Listen to their answer. You are trying to give the impression that you will be politely persistent and determined with your request. Remember short and to the point phone calls seem to be respected. Record who you spoke to and when.
3. Repeat followup phone calls. "Hi my name is XXX from Citizens' Climate lobby and I am just following up on my meeting request for XXX MP". Listen to what they say. Record who you spoke to and when. Keep doing this until you get a definite yes or no to the request (or when you give up hope of receiving a yes answer).
4. When an appointment is offered, they may give you some flexibility on date and time so contact your team immediately on their availability and lock down a day and time as quickly as practical. If an experienced CCL lobbyist is not available for the selected time, contact your CCL regional coordinator or an alternative lobby team adviser.
5. After an appointment has been confirmed confirm there is an MP Bio for that person. If yes – update it with relevant information. If no – prepare one using template provided.

Link to current standard email text.

Meeting Team Preparation

Once you have a date and time for your meeting, get your team together either in person, on a Zoom video meeting, by phone conference or a combination of the three. If there is more than one person experienced in leading a CCL lobbying meeting then select one as your lobby team adviser. They should then run the meeting and cover the following issues.

- Hand out the CCL lobby meeting guide, information on the Asks and the politicians Bio
- Go over in detail CCL's lobby meeting approach and rules (Link)
- Identify the aims of the meeting with the politician
- Give details of the climate solution asks for the lobby meeting and discuss
- Discuss the politicians Bio and what people know about them
- First choose the lobby team leader (usually yourself if you are doing the organising)
- Identify the meeting roles for each of the other team members
- Identify who will do the main appreciation of the MP
- Have each of the team members practice their 20 second introductions
- Have each team member with a more significant talking role practice their contribution. If making an Ask ensure they make a very specific actionable ask. It is alway better to get even a small actionable Ask accepted then getting a refusal.
- Have someone record a meeting plan to distribute to each members
- Share phone and email contact information between the team
- If the meeting is going to be on Zoom, book the CCL Zoom number for the meeting time. Make arrangements for those with no Zoom experience to practice using the system

The lobby team leader and adviser should identify any potential problems that may occur with team members in the lobby meeting and how to try to ensure those problems don't occur. The most typical problems are a team member talking too much (the politician should do most of the talking) and a team member getting angry at comments made by the politician (some politicians make comments designed to bait attendees to get angry or emotional responses).

It is normal to have a final meeting around 30 to 40 minutes before the lobby meeting to review the plan and do some final practice.

Post Meeting Debriefing

A review of the meeting is carried out immediately after the meeting if practical and the person that had responsibility for recording notes from the meeting goes through what they recorded and the other team members add extra information that they remembered or recorded. Ensure you have recorded any followup action agreed to by the MP or the lobby team and allocate responsibility and completion time. The Lobby team leader is responsible to follow up to insure the team's actions are completed. The best way to follow up on actions agreed to by the MP is usually with a followup meeting.

Submitting Field Reports

The lobby meeting Team Leader is responsible for submitting the Field Report for the meeting using the CCL Community facilities.
How to do a Field Report - **Meeting Minutes Form**
After submitting you should get an email advice sent to your own email address that includes a "Report Number" and the text of the report as it appears in the CCL computer system. The team Leader should also update the Bio including adding the new Field Report Number.

Follow Up Meeting

One measure of the success of a lobby meeting is the willingness of the MP to have a followup meeting (four meetings a year is considered the ideal). Identify the most appropriate time to have a followup meeting with the politician and who has the responsibility for organising this meeting