

# ADVOCACY:

## Getting What You Want from a State Legislature or County Commission

NACCTFO Annual Conference

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Philadelphia, PA

Presenter: Dana Gill



# Welcome & Housekeeping

- Quick poll on previous lobbying experience
- Today's goal- practical advocacy tools across experience levels
- Comply with your own state laws





# Session Agenda

## **1:45-3:00 PM**

- Importance of relationships in advocacy
- Building effective advocacy strategies
- Adapting advocacy for the digital age
- Collaborating with others

## **3:00-3:15 PM**

- Break and Visit Sponsors

## **3:15-4:00 PM**

- Real-world scenario partner exercise and debrief
- Action planning and next steps
- Q&A and Closing

# Knowing the Process = Power

- Know calendars, committee structures, deadlines
- Identify key players for your location, issue areas, agenda
- Differentiate between budget and policy cycles



# Your Advocacy Journey: From Point A to Point B

- Think less about “lobbying” and more about “advocacy”
- Advocacy = Building Relationships
- Advocacy = Being an Educator/Issue Expert
- Advocacy = Becoming a Trusted Resource

# Relationship Building: The Heart of Advocacy



- Legislators & Commissioners are people. Listen. Be persistent. You have knowledge they need.
- **It's a marathon, not a sprint**
- Catch more flies with honey-positivity works!

# Building Two-Way Communication

- Build relationships before you need something
- Ask about *their* priorities and look for overlap
- Prioritize listening before requesting
- Provide value as a trusted expert and resource
- Maintain regular check-ins for updates
- Follow through on previous conversations
- Let positive constituent outcomes tell your story
- Trust and familiarity make it easier to pick up the phone later



# Starting at Point A: What's Your Issue?



- What needs to be changed?
- Who does it impact and how?
- When does it need to be changed?
- Who has the power to change it?
- What will be the beneficial outcome of the change, and how does it fit into the bigger picture?
- Pros/cons and opposing arguments



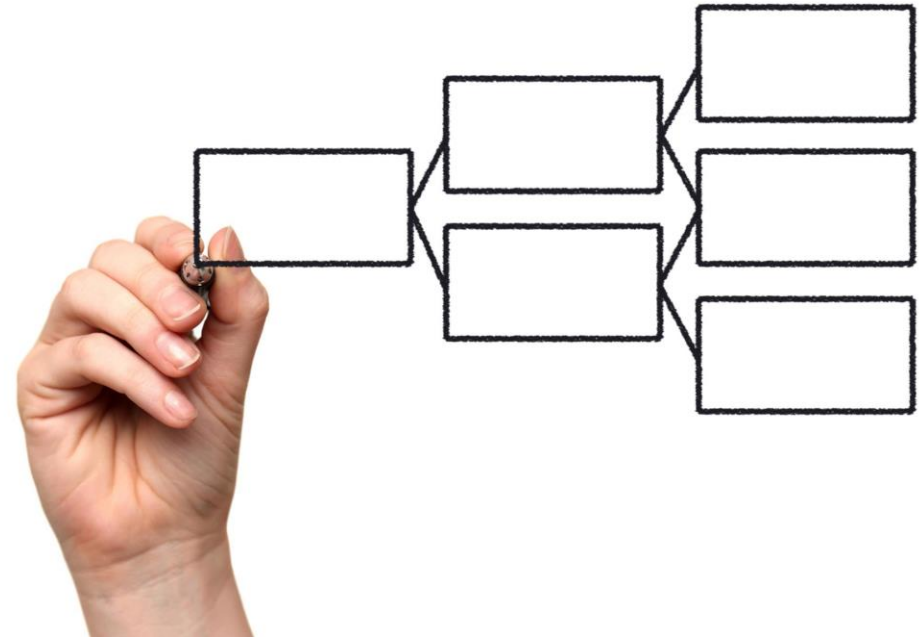
# Moving to Point B: What's Your Strategy?

<b>What do we want?</b>	<b>Who can deliver it?</b>
<b>What do they need to hear?</b>	<b>Who do they need to hear it from?</b>

- Identify your audience (state/county/agency)
- Understand the process and think like a legislator
- Pick the right messenger and message

# Stakeholder Mapping: Who Has Power?

- Identify primary decision-makers in the issue
- Recognize influencers and advisors
- Engage potential allies and opponents
- Consider critical staff roles
- Broaden perspective beyond immediate stakeholders



# Working with Legislative & Agency Staff

- Staff have more availability than officials and are often your first line of communication
- They possess valuable expertise on processes and issue details
- Long-term relationships yield benefits



# Informal & Informational Meetings

## **Building Relationships Before You Need Them**

- Start Early: Build relationships before you have problems to solve
- Timing Matters: Know their calendar - avoid budget crunch times
- Schedule Smart: Book in advance, confirm day before
- Keep It Light: Minimal materials, maximum relationship building
- Better Than Meetings: Invite them to tour your facilities
- Your Value Proposition: Share what your office does, offer expertise
- Set Expectations: Mention you may request formal meetings later

## **Always Follow Up**

- Get contact preferences for them AND their staff
- Send thank you within 24 hours
- Add them to your regular communication schedule

# Formal Meetings & Committees

## **Before the Meeting**

- Ask staff for likely questions in advance and how long you will have to speak
- Practice your comments out loud
- Coordinate with lobbyists or advocacy groups
- Bring backup person for notes and support
- Confirm how many copies of materials to bring

## **During the Meeting**

- Be concise, you may only have 5-10 minutes
- It's okay to say "I don't know" but follow up promptly

## **After the Meeting**

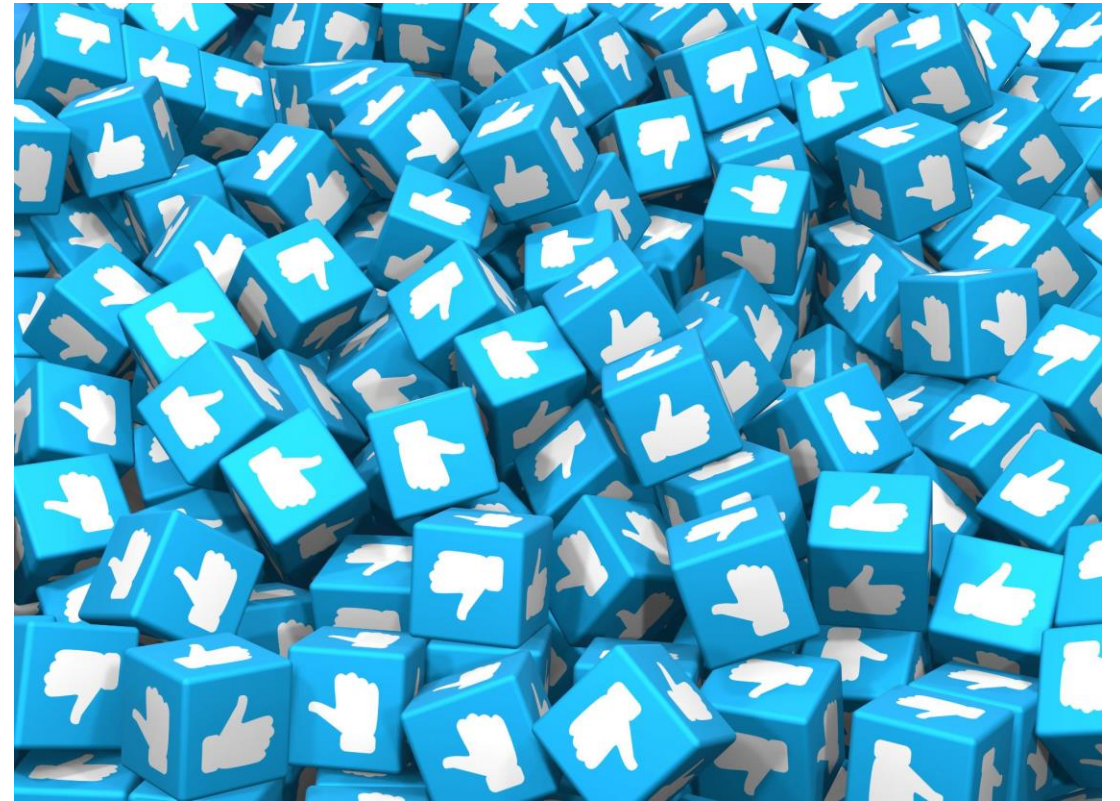
- Send recap email within 24 hours and provide promised information quickly

# The Bottom Line

- Offices cannot know everything about every issue. Your task is to become the person they trust and turn to for advice
- When a local government/fiscal issue arises, you want to be the first person they call
- Like any relationship, this process requires time and attention
- Share the good news and build mutual respect, two-way communications.

# Digital Age Advocacy

- Facebook, X/Bluesky, LinkedIn, newsletters all build awareness
- Be visible
- Be useful
- Be professional
- Comply with your own state laws





# Virtual Relationships & Meetings

- Use best practices for email communication before and after meetings
- Share documents securely
- Coordinate with digital coalitions and allied associations



# Collaborations Matter

- Every county brings value
- Coordinate with associations and avoid duplication
- Larger counties: use your access to uplift collective needs, make space
- Smaller counties: your story may resonate more than data ever could, speak up!
- Attend events and advocacy days



# I've Literally Never Done This Before: How & Where Do I Start?

1. Start with your state associations for guidance and introductions
2. Look up your legislators/commissioners and their committee assignments
3. Identify which committee covers your issues, then find out who sits on it
4. Visit the legislator's official website for contact information
5. Call and ask: "Who is the staffer who handles [state your topic]?"
6. Build a relationship with that staffer since they are often the key decision influencer

# 15-Minute Break & Sponsor Visits

**3:00-3:15**

Regency Foyer - 2nd Floor Mezzanine

Get your passport stamped!

# Real-World Scenario Partner Exercise

## Scenario

You are new to your position and attending your first state association annual legislative conference, where state legislators and staff will be present and available to connect.

## Task

How do you prepare and approach key officials?

- Break into groups of 2
- Assign roles (1 new member, 1 legislator/staff) and switch places if there's time

## Practice

What's the issue? How do you engage? What's your ask?

- Use the prompts in your handout to prepare your elevator speech
- Use your real issues if you have a policy ask

# Debrief: What Did We Learn?



- What worked?
- What felt challenging?
- What will you try in real life?

# Professional Standards & Etiquette

- Kind of like meeting your in-laws for the first time
- Dress the part: business attire is always safe
- Prepare materials and arrive early
- Do your homework on the policymaker and issue
- Show respect for their time and role
- Respect communication timing and follow-up
- Understand gift policies and ethics rules
- Read the room and cues



# Taking the Anxiety Out of Advocacy



- Preparation = confidence
- Advocacy = education
- Practice builds trust

# Q&A and Closing

## Worksheet Review

- What are the top 3 things you're going to do when you get home to up your advocacy game?
- Write them down and commit to an action date

## Questions & Comments



# THANK YOU

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