

Mobilizing Together Towards 2014
Se mobiliser vers 2014

Lobbying Handbook
Trousse de lobbyisme



ONTARIO MUNICIPAL EMPLOYEES COORDINATING COMMITTEE



COMITÉ DE COORDINATION DES EMPLOYÉES ET EMPLOYÉS MUNICIPAUX DE L'ONTARIO



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INTRODUCTION

■ WHY IS LOBBYING AN IMPORTANT SKILL TO DEVELOP NOW?

“Lobbying”, it’s an intimidating word, isn’t it? But, in fact, lobbying means to talk to politicians and to advocate for a certain outcome.

Lobbying is not about confrontation. It is about making ourselves known to politicians, finding common ground where possible, and providing information and educating politicians on issues that are important to our members and our communities. It’s also about holding our elected politicians accountable for their voting record.

This kit is designed to give CUPE locals the “A, B, Cs” of how to lobby their politicians and to advocate for those things that will benefit our members. As municipal workers, we will spend a good deal of time talking about, and talking to, our locally elected councillors and mayors. But the skills you develop will also be useful when talking to politicians at every level of government.

There has never been a time in CUPE’s history when the ability to advocate, or “lobby”, for positive change in the workplace was not a necessary tool. However, some significant strikes in our sector and the increasing threat of privatization and contracting out of our services illustrate more than ever that, within the municipal sector, we need to build relationships with the people who make policy that directly affects our workplaces. We also saw in the last round of municipal elections that, in some communities, citizens voted for change even when it meant a political swing to the far right.

This Lobbying Kit is the first part of OMECC’s campaign to build towards the next round of Municipal Elections in the fall of 2014. We have four years to build relationships with the politicians elected in 2010 and to develop the capacity within our locals to fend off threats such as contracting out. It also gives us four years to build relationships with and educate our politicians and communities and to identify progressive candidates, existing and new, who we can support in the next Municipal Elections in 2014.

These lobbying skills and processes will also assist your local when issues come up at other levels of government.

This kit has straightforward step-by-step “how-to’s” in the outer sleeve. Within the kit is more detailed information that you may find a useful reference.

WHY LOBBY?

Collective bargaining used to be between municipal officials working in Labour Relations or Human Resources departments and the employees’ bargaining agents, the unions.

More and more we see politicians take a direct role in the bargaining process. In some smaller communities, councillors are part of the employer’s bargaining team. In other municipalities, we see politicians use the bargaining process as a way to turn public opinion against its unions and employees, appearing in the media on a regular basis and bargaining in and through the media. We saw these tactics in Windsor and Toronto in 2009. For many politicians, the line between “governance” (politics and policy making) and “administration” (directing the workforce and implementing policy) has become blurred.

CUPE locals have to use more tools now than they did 20 years ago to achieve their goals. Getting to know our municipal politicians and asserting influence behind the scenes, or “lobbying”, is another tool we can use.

Is your local union growing or shrinking? Is it growing as fast as the population of the municipality is growing? If not, who is doing the work for the growing population? That’s another sign that we have to be defending our work.

Whether or not you are talking to your politicians, you can be sure that others are. Independent business persons and multinational corporations are looking at municipal services as very profitable business opportunities.

It is important to know what is going on in your municipal council, what issues are coming to council and how politicians are voting on issues.

As part of your lobbying efforts, it’s important to track councillors’ voting record over the next few years. Politicians will often tell us what we want to hear. But their voting record will tell us where they really stand. Tracking their voting record will also tell us where a politician’s beliefs tend to fall and where we can perhaps count on them in future. However, you will also find that some politicians will flip-flop depending on the issue. This too is important information.

When Council is going to vote on an issue important to your members and your community, try to count the votes in advance. Will the decision be the one you want? What can you do to make sure it is? Lobby the councillors who might be convinced to vote your way. Lobby the councillors you already think will vote your way – be sure. Even lobby the councillors who will likely oppose you. Maybe there is some room for agreement. Try to get a couple of extra votes for those times when, for whatever reason, politicians flip to the other side of a vote at the last moment, or miss the vote all together.

Lobbyist Registry

Municipalities may have a Lobbyist Registry, but few do. If your municipality has one, check to see who has to register. In Toronto, unions do not have to register if they are communicating about labour relations matters.

If you go to speak to your councillor as a resident of her/his ward, you are not a lobbyist and do not have to register.

Checklist: Why lobby?

- ✎ Councillors make policy decisions that impact on the work we do and the quality of our work.
- ✎ To get to know the councillors and which ones support us.
- ✎ To get to know the councillors and what issues they are interested in.
- ✎ To convince more councillors to support us.
- ✎ To give information and education to municipal politicians about our local union, our leadership, and the work we do.
- ✎ To make sure that public services are being delivered by municipal employees - our union members.
- ✎ To create a climate in which we can negotiate collective agreements that include protection of bargaining unit work:
 - o Protection against contracting-out of any bargaining unit work
 - o Protection against turning full-time jobs into part-time jobs
 - o Restrictions on replacing full-time and permanent employees with temporary and casual employees
 - o A provision to turn temporary jobs into permanent jobs after a certain period of time
 - o Job protection when positions are deleted
 - o Bumping process by seniority if there are layoffs, and
 - o A process for addressing workload issues
- ✎ Municipal politicians are involving themselves in bargaining.
- ✎ To be effective participants in municipal elections.
- ✎ For any and all of these reasons, your union local should seriously consider learning to lobby your politicians.

WHEN SHOULD YOU LOBBY?

■ PROACTIVE LOBBYING

As union locals, we are used to reacting to issues in the workplace. Sometimes we can gain more control of situations by being proactive. Being proactive requires that you establish and maintain a relationship with your municipal politicians – before there’s a big crisis or conflict. Asking for assistance from a politician who you have never spoken to is not going to be as effective as talking to a politician who knows you and has regular contact with your union.

See the section in this Lobby Kit called “*Getting To Know You*” for information on establishing relationships with your municipal politicians.

Select a committee, or assign at least one person within your local union to read all correspondence that comes from your municipal council: Notice of Meetings; Council Agendas; Committee Agendas; Reports. If your Collective Agreement doesn’t require the municipality to give you these reports as soon as they are public, go to the municipality’s website and monitor for public announcements. Go directly to your town or city hall to obtain documents.

Assign members of the committee or someone from your local to monitor city council meetings. Watching and knowing how the politicians react and interact together first-hand can prevent surprises.

Example: Proactive Lobbying

Municipality ABC has a proposed capital project to build a new community centre. We can assume that the town will continue to deliver the service directly and hire staff who will be in the union, as they have always done. But unless your collective agreement ensures that the work will be bargaining unit work, this would be a good time to be proactive. Talk to the politicians about their plans and about why keeping the work in-house is best for the community.

Try to find out what management is thinking. Read the reports from senior staff to council. If possible, talk to senior staff and managers. Often this is where you will see the first signs that the municipality may be considering contracting out the work.

If you have built relationships with your city councillors, **approach the “friendly” councillors that are willing to share the knowledge they have of the situation.** When you have discussions with them, have an “ask” – a concrete action they can take. They may not have first-hand knowledge, but, if asked, they may be willing to find information through their own sources. They may also be able to tell you which other politicians would also likely be in favour, or who would be against a move to contract out your work.

Know your facts:

- Research the pros and cons of contracting-out or contracting-in your work.
- Contact your CUPE National Representative and ask them to get research assistance from CUPE National.
- Are there historic examples of contracting-out your work that did not work well for the community?
- Are there examples within other communities that can be used?
- How is service better provided by the city/township?
- Is there a cost benefit to the work being directly delivered by the city/township?
- Analyze reports to council on the issue. Are their facts complete and correct, or biased?

Make sure you understand what opposition you will encounter as you lobby so that you have arguments to try to counter your opposition. Talk to the politicians that are on the other side of the argument. Provide them with reliable information that might sway them.

Count your votes! Your objective is to get a majority of councillors to vote your way. How many is that? Do you know that a majority of councillors will support the union's position? Have you talked to every councillor to ensure that you have a couple of extra votes in the event some change their minds at the last moment?

Find allies. Talk to community groups that may support your lobbying effort. If you have allies that you know and trust, ask them to approach politicians to express their views as well. Share any research you may have with your allies, and likewise find out if they have information to support your position.

■ REACTIVE LOBBYING

“Reactive Lobbying” is what we do after it's almost too late – after a proposal for cuts or privatization or layoffs is already well under way. It is difficult to find all the information you need, to do the research and to build alliances on very short notice. Lobbying is more effective if it is an ongoing process of building relationships with your municipal politicians and your community and labour allies.

You will want to start your lobbying campaign immediately. Follow the steps in the section of this kit, “Getting To Know You”.

Checklist: When to lobby

- Regularly and consistently – to maintain relationships with the councillors.
- When there is an imminent or distant threat to the work of the local:
 - monitor council and committee agendas
 - talk to councillors
- When you hear about a threat from management.
- When you have the facts.
- Get research assistance from CUPE and talk to your CUPE National Representative.
- Prepare written presentations for your lobbying.
- Speak to friendly councillors first to assess their view of the issue and learn more about the opposition.
- Speak to the rest of the councillors and understand opposing views and be able to respond appropriately to opposing views.
- When you need more councillors to vote your way.
- To ensure you have more votes than you need.

HOW TO START YOUR LOBBYING EFFORTS

■ GETTING TO KNOW YOUR MUNICIPAL POLITICIANS

Ontario residents have just elected municipal councillors that will be in power for the next four years, until October 2014.

One of the most direct actions you can take is to contact your own elected politician – in person, by phone or in writing. CUPE members are voters, and, as individuals, hold a great deal of power over elected officials. Remember that CUPE is the largest union in Canada, and the power of that constituency should not be forgotten.

By getting to know your municipal politicians, you will soon realize that they are people like all of us and they will seem more approachable as issues arise. They may even seek you out for information and advice as they get to know you and your local!

Why should you “bother” getting to know your politicians? Look at it this way - if you’re not talking to them, there are many others who ARE. These other interest groups talking to your councillors may be influencing them in ways that are not in the best interests of your local. They are entrepreneurs and corporations who see a lucrative business opportunity to deliver the work that your members are doing now. You may be surprised how you can influence your local government by being proactive instead of reactive when a crisis in municipal policy arises. By talking to all of your municipal politicians, you can ensure that your issues are more likely to be discussed at council and taken seriously.

Now is the time to start building a relationship with your councillors and mayor. That is so much easier than trying to establish a rapport during a crisis that perhaps puts you at odds with the mayor or council.

■ GETTING TO KNOW YOU

Start building your lobbying skills by having introductory meetings with each councillor and mayor as a “Getting To Know You” exercise.

- Make a list of the councillors and try to build a short profile on each one.
- What constituency do they represent?
- Are they newly elected or have they been returned to office?
- What are their backgrounds, businesses, community activities, and political affiliation?
- If they are returned to office, how have they voted on important issues in the past?
- How does the media view them, as progressive (the left?), conservative (the right?) or somewhere in between (sometimes called the mushy middle)?
- If they have constituency assistants, find out about them too.
- Contact information. How do you get in touch with them?

■ DO YOUR HOMEWORK

Use the internet. Check your city’s website for basic information, then look to the local papers and editorials to see what was written about them leading up to, and since, the last election. Try to find

out what their personal interests are, not just their political leanings. Who are their friends and foes politically?

Talk to your allies who may have more experience talking to your municipal politicians and pool your information.

You don't necessarily need reams of information, just enough to give you a sense of them as politicians and people.

■ FIRST CONTACT

As a courtesy and a first introduction, your local union should send each successful politician a letter of congratulations on their election win – even if you believe they are not necessarily friendly towards the union. Not every letter has to be the same. For those politicians you may have a relationship with already, your letter will have a different tone.

Your letter should always be brief, businesslike and polite. Politicians are busy people; never be too wordy.

Let them know you'll be calling to set up a meeting in the near future.

■ GETTING TO KNOW YOU - MEETING

Phone the councillor/mayor's office to set up an appointment. If asked, keep the agenda for discussion open. You only need to say it is a "getting to know you" meeting.

Decide ahead of time who from your local will attend the meeting. Most councillors will likely be on their own at the meeting, so don't have an overwhelming number of people greeting them.

Decide who will lead the meeting. You want to have someone in control of the tone that is set for the discussion, who knows when it's time to change topics of discussion, and when it's time to end the meeting.

If it is a new councillor, tell them first about the local union – who you represent and who the executive members are. Offer to provide them with information from the front line workers.

Have a short agenda of issues you'd like to discuss. This first agenda might include items that you think will come to council soon that are important to your members such as proposals for contracting-out, for P3s, gapping and funding issues for one part of the organization. You may also want to let them know what is important to your local and your membership such as growing workload concerns, health and safety concerns, attrition and morale.

Know your facts. Do any necessary research on the issues you wish to raise. Think about personal experience in the workplace that might enhance your discussions and make the issue more relevant to your politicians. Never assume the politician is fully aware of your issue, so be prepared to educate them without being "preachy".

Do you want to leave the meeting with any commitment from your politician? If so, know what you are asking of them and be prepared to follow up.

You may ask them to find out more information about proposals coming to council. If they are of a like mind on your issue(s), they may be able to find out how their colleagues in council think on the issue. Having an "ask" is a good way of ensuring that you have a way to follow up with them and keep communications open with them.

It is important to ask the politician to do something she or he can do, like getting more information for you. Don't ask the councillor to promise something that they can't promise, such as firing a bad manager or always supporting your issues.

Decide ahead of time who on your team will speak to each issue and what they will say. Make sure that everyone on your team knows what will be said on behalf of the local. Improvising can be risky. Have notes that your team refers to so they stay on topic and bring forward all the information you intended to in the meeting. Anticipate how the discussion will go and what questions the councillor may ask. Be prepared to answer them.

Assign a member of your team to take notes of what is said in the meeting. You don't have to have verbatim notes, but keep track of any commitments made and any questions that could not be answered in the meeting so that follow-up will occur.

It is good to leave behind some written material. If it's your first meeting, it might be simply a list of the executive and contact information.

Prepare a small portfolio with some basic information. It can be as simple as a single sheet, or more, if you choose.

- What is your local designation?
- What is CUPE?
- What jobs do your members do?
- Do your members live in the community they work for?
- Does your membership reflect the community in terms of its diversity?
- Has your local done charitable or philanthropic events in the community?
- How can your local assist them by providing research, etc.?
- Who should the councillor contact from the local if they wish to? And how do they make contact?

If you are having a discussion of a particular issue such as P3s or contracting-out or trade agreements or health and safety, you can leave some research produced by CUPE with the councillor.

You will be surprised how little some politicians really know about unions. Take this opportunity to give them some useful introductory information.

■ IN THE MEETING

In the meeting, be disciplined and stay focussed on the issues you want to discuss.

Be clear and concise on the points you want to raise and speak with confidence.

Be positive and friendly. Don't get into arguments and debates and don't lecture.

Be a good listener. Allow your politician the time they need to respond to your questions and concerns. It is better to hear what you don't like, than to be surprised by their position later when an important debate comes to council. Remember, you're trying to get to **know** them.

If questions come up that you can't answer, don't make up an answer. Use this as an opportunity for follow-up. Tell them you'd be happy to get back to them. A chance to double back to them after they have digested what you've said is a great opportunity to further build your relationship.

Keep the meeting short. Fifteen to 30 minutes is usually long enough. Don't overstay your welcome.

■ AFTER THE MEETING

After the meeting, send a follow-up letter thanking them for their time and repeating any commitments for follow-up made by the union or the politician.

As a group, do a short debrief. Did the meeting go the way you thought it would? You may be surprised that you didn't have agreement where you thought you might.

Don't be discouraged. Even with progressive councillors you will find that they can't always agree with you. Ask yourself if there is further research you could provide that will help them understand your view. Sometimes, however, you have to accept that you will not always win politicians to your point of view. In politics today, many politicians will take a position issue-by-issue.

What follow-up is needed? What questions came up that you need to follow up on? Decide who will follow up with any research that may be required. Ensure you get back to your politician in a timely way. If possible and appropriate, use the follow-up as a way to have another face-to-face with them. You can also write to them with the information. They'll appreciate your follow-up and it will demonstrate that you're serious about your communications with them.

- Finding issues where you can agree or don't agree is part of "Getting To Know You".
- Circulate your notes to your lobby team to build on as you continue to lobby your municipal politicians as issues arise over the next four years.
- Share information that came out of the meeting with your local leadership and allies
- Track the results of each of your meetings.
- Determine what your next steps will be.

■ OTHER WAYS TO GET TO KNOW YOUR COUNCILLORS

Social Event

Hold a "Meet and Greet" social for new councillors, the whole council, or whoever you decide. Serve food and refreshments. It is still important to plan this event so that you know that everyone who needs to meet each other is going to meet each other so the issues that the union wants to talk about get raised. Who will greet the politicians? Who will raise certain issues with which politicians? You will still need to do your homework. What are the issues that are important to them and how will the union respond?
















Public Meeting

Hold a public meeting, town hall meeting or forum to provide information about issues that are important to the local. Bring in an "expert" to talk about the impact of privatization, or public-private partnerships, or health and safety and invite local politicians to attend.

Community Events

If your local sponsors a picnic, or works in a food bank for a day, or collects medicine to send to another part of the world, invite the councillors to join in.

Checklist: Getting to know you

-  Do your homework – research the background of each councillor, newly and re-elected.
-  Send a congratulatory letter to each councillor/mayor.
-  Create a portfolio describing your local and the work your members do.
-  Extend an invitation to your councillor/mayor to meet with you.
-  Create a lobby team – assign roles for the meeting.
-  Create an agenda for your meeting.
-  Get your facts straight on each issue to be discussed – get research as needed.
-  Do a debrief after the meeting – determine what follow-up needs to happen.
-  Identify community partners that have a similar position as your local on key positions and ask them to follow-up as well.
-  Look for new ways to follow up and continue the dialogues with your councillors/mayor.
-  After the meeting send a follow-up letter thanking them for their time and repeating any commitments for follow-up made by the union or the politician.
-  Review your notes and decide what follow-up actions have to take place.
-  Share information that came out of the meeting with your local leadership and allies.
-  Track the results of each of your meetings and count the votes.
-  Determine what your next steps will be.

BACKGROUND RESEARCH FOR YOUR LOBBYING CAMPAIGN

■ KNOW THE ISSUE(S)

Know the issues you want to lobby about. You don't have to be an expert, but make sure your facts are accurate so you can't be challenged on them by your adversaries.

CUPE Research will help you. CUPE will likely already have some general research about your issue. You don't have to be original and reinvent the wheel to be effective in your arguments. Ask your CUPE National Representatives to make any research requests to the assigned researcher.

Research takes time. CUPE Researchers and Representatives can get general information to you quickly, but original research and analysis of a new or specific situation takes longer. Figure out what research needs to be done as soon as possible.

Be prepared to tell your own examples and facts from within the workplace and the community. These personal and local stories are often more compelling than general research for a local councillor. For example, if the council is thinking about contracting-out a recreation centre to a non-profit agency, remind them about the skating rink that some other non-profit organization let run into the ground because it didn't have the money to keep it up. Give examples of municipalities that contracted services out, and later had to contract them in because of problems. Better still, try to provide examples in which municipalities considered contracting-out and ultimately decided it was best to keep the work in-house.

Look back into the history of your own municipality. Perhaps your issue has been raised before and defeated by a previous council. Refer to old council reports. Do the arguments for not contracting-out last time still apply? You can refer to previous newspaper editorials and articles on the issues. What did the community think about the issue then? Perhaps this attitude still applies and can help you when planning a campaign in the community.

Know why the issue is coming forward now, or coming forward again, as the case may be. Is it economics, or perhaps part of someone's political or personal agenda? That will help you figure out what arguments to make to show that public services should be delivered by public employees.

■ TALK TO SENIOR STAFF AND MANAGEMENT

Talk to senior staff that write and present reports to council. They may provide you with additional information about why the issue is coming forward to council. Question them about the financial information and other justifications contained in the report. Analyse their reports and information for accuracy. Is the information provided biased or inaccurate? Ask for help from your CUPE National Representatives when analyzing reports. There are people at CUPE who can help you make sense of the situation.

■ PRESENTING YOUR RESEARCH

When it is appropriate, put together a brief report to leave with the councillors for them to refer to. It is important for them to hear all sides of the debate. Be clear and concise, especially where you are challenging the statistics and conclusions that may have been reported by management and senior staff. Don't make any report too long and wordy. Politicians will put it down without reading it if it looks too lengthy and complicated.

If you are leaving a longer, more substantial research report with the politician, be sure that it has a brief summary at the beginning. Point that out to the councillor.

Share any briefs you present to council with your allies so everyone who is talking to councillors about the issue knows your point of view and has your information.












■ BE PREPARED TO BE CHALLENGED

Anticipate questions that may come up, especially from those in opposition to your position.

You may be asked questions that you can't answer on the spot. Don't "wing it" or make things up. Tell them you'll get back to them with the answer. This gives you an opportunity for another face-to-face meeting or a written communication on the issue.

As you get to know your council, you will find out quickly who your opposition is likely to be. Don't spend valuable time trying to lobby politicians that simply won't be swayed. Solidify your favourable votes and continue to talk to those politicians that you think you might be able to win over. This is where your allies can help you the most. A politician who hears consistent information and opinion from the union and community groups is more likely to vote favourably on your issues.

Checklist: Background research

-  Know the issue you want to lobby politicians about. Make sure your facts are accurate.
-  Research the history of the issue in your community.
-  Research the rationale that underlies council's or management's decision to take action.
-  Use local and personal stories to make the issue more compelling.
-  Gather general information from CUPE about the issue – such as P3s or contracting-out or the best practices for child care.
-  Plan in advance if you need new and specific research for your campaign.
-  Ask questions of senior staff and management.
-  Ask questions of your allies on council.
-  Present your research to the politicians in a manner that is brief and accurate.
-  Leave written material with the politicians. If you are sharing long documents with the politicians, be sure to include a brief summary.
-  Be prepared for the questions and challenges that will come from your opposition.

COUNCIL WATCH: WHAT'S ON COUNCIL'S AGENDA?

An effective “early warning system” includes keeping track of issues that council is considering that will affect your members and public services in your communities.

■ LOOK AT COUNCIL AND COMMITTEE AGENDAS

In order to get information as soon as possible – before council makes any decisions on issues that affect us - assign someone to look at city council and committee agendas as soon as they are publicly available. Agendas have to be public at least one day (sometimes longer) before the meeting, although some agenda items can be added the day of the meeting so we need to have someone at the meeting to know for sure what goes on.

■ GETTING THE COUNCIL AND COMMITTEE AGENDA

- Ask the clerk to e-mail or fax or send the agendas to some key CUPE local members as soon as they are public.
- Check on the city's website to see the agendas as soon as they are public – they will be posted at a regular time, such as Friday noon for a Monday evening meeting.
- Negotiate a clause in your agreement that requires the city to make the agendas available to you as soon as they are public.

Keep track of contracts that are being put out for tender by the city and contracts that are being approved.

Find out about the municipality's purchasing policies from the city clerk or another municipal official.

- What are the municipalities' policies about which contracts must be publicly tendered – put out for bids?
- Which “Requests for Proposals” (RFPs), “Requests for Qualifications” (RFQs), “Requests for Expressions of Interest” (REOIs) and which bids need to be approved by council or a committee before they are tendered?
- Which bids or contracts can be signed off by management staff without going to council?
- Watch the agendas for committees of council for managers getting authorization to contract out city work. Check with your members to see if that is new work going out or work that has been contracted-out in the past.

This will assist you to know where to watch to find out what council is contracting out.

Try to find out whether and when council reviews its outside contracts (some councils receive a report of all contracts with outside suppliers once or twice a year).

■ ATTEND COUNCIL AND COMMITTEE MEETINGS

The only way to know **everything** that goes on at city council and committee meetings is to have someone at each meeting. Management may not put all reports for council on the agenda that comes out in advance, but may just bring them to council as rush items.

Attending all of the council and committee meetings is usually too much for one person. Create a “Council Squad” to share the work and share the information. It is sensible to assign one person to each committee. If the committees are set up along the lines of the city’s operational departments or divisions, assign someone from the department or division to the committee agendas and meetings because they will have a better understanding of what the items listed in the agenda are about.

■ OTHER WAYS TO WATCH COUNCIL

Check your local cable TV channel and the internet for live broadcasts of council meetings. (You can watch from the comfort of your own sofa, but your family might be bored.)

If no one from the local was able to attend the meeting, be sure to assign someone to read the minutes of the meeting.

A DELEGATION OR DEPUTATION TO COUNCIL

A “Delegation” or “Deputation” is a formal presentation that is made to the municipal council or a committee of council. The presentation may also be made to an Advisory Panel or sometimes the directors of a municipal agency, board or commission.

This section will assist your local to prepare a deputation or presentation.

■ WHEN TO MAKE A DEPUTATION

Delegations or deputations are made about issues, recommendations and decisions that are on the agenda of a council or committee meeting.

When city council is considering an item that will affect public services in your community and affect CUPE members, your union local can make a delegation or deputation to present the union’s point of view and any alternative proposals that you have to the council.

Some examples of when to make a delegation:

- Council is considering contracting-out work done by the bargaining unit.
- Council is considering asking a private company to deliver public services.
- Someone is proposing a public-private partnership (P3) to build a new public facility like an arena or sewage treatment plant or community centre.
- Council is considering expanding or terminating some services or selling city property.
- In support of the union’s allies in the community.

If your union local has more than one major point to make to the committee or council, consider having more than one person make a presentation.

See “Council Watch” on page 15 about keeping track of council and committee agendas.

■ GETTING THE OPPORTUNITY

The clerk or clerk’s office makes the appointments for deputations to council or committees of council.

Call or e-mail the clerk’s office or check on the municipality’s website to get the details about how to be scheduled for a deputation.

- How far in advance do you have to ask to make a deputation? It might be 1 day or 3 days.
- Do you have to make your request to the clerk in writing?
- In some municipalities, the chair of the committee may ask the audience during the meeting if anyone wants to speak about a certain issue.
- How long can the deputation be? They are usually 5 or 10 minutes, but if a lot of people want to make deputations on one issue, presentations may be limited to 3 minutes.

“Community Delegations” in Sudbury must be requested in writing and written material submitted one week in advance.

- How many written copies of the deputation should you bring to give to the clerk? When do you have to get those in?

Delegations to the Town of Richmond Hill have to complete a special form and submit it by noon on the day that the item will be discussed by the committee.

■ ORGANIZING FOR THE DEPUTATION

Before making a deputation, it is best to talk to the mayor and / or several councillors who are likely to be supportive of your local union's position. Let them know what point your union local will be making. Ask for their assistance in the process of making an application. Ask for their cooperation in making a motion to the committee or council to support your recommendation.

Once you have a date for your presentation, immediately notify your union members and community allies and urge them to attend the meeting. It is very important that your local members come out to the meeting. If the CUPE members affected don't care, why would anyone else?

Mobilize as many people as possible to fill the council chambers for your deputation to create as big a show of support as possible.

Take some extra copies of the deputation or any brochures to hand out at the meeting.

■ WRITING AND PRESENTING THE DELEGATION OR DEPUTATION

The union will select one person to make a deputation.

Either the presenter or someone else will prepare the actual presentation.

Some people can speak from a few notes, but it is generally best to write out the deputation in advance. (See Tips, next page.)

Be prepared in case you run out of time and can't give your whole presentation. Decide in advance which part or parts you can skip for the oral presentation. It will still be in the written presentation you leave with the councillors.

■ WHAT TO DO AT THE COUNCIL OR COMMITTEE MEETING:

- Wait until the chair calls on you before going to the table or the podium.
- Introduce yourself and anyone else standing up with you.
- The chair of the meeting is responsible for conducting the meeting. Always follow directions and instructions from the chair.
- Address your presentation to the chairperson.
- Speak slowly and clearly – even if you are really nervous.
- Make eye contact with your audience.
- When you have finished speaking, remain at the table or podium until you have been thanked by the chair. The chair or members of council may ask you questions. Please wait for direction from the chair before responding to comments or questions from the members. When you answer questions from anyone other than the chair/mayor, the proper protocol is to say, "Through you, Mr./Madam Chair" or, if the mayor is chairing the meeting, "Through you, Your Worship" rather than directly answering the person who asked the question.
- Thank the committee or council one final time.
- After the presentations, the committee or council will discuss and debate the issue themselves, and then take the vote.

TIPS FOR YOUR PRESENTATION:

Introduction

- Thank the mayor or chair and the members of the committee for the opportunity to present.
- Introduce yourself.
- Explain who the union represents. You may want to refer to other union members in the room. ("We have all 10 members from the social services office with us today".)
- State your reason for making this presentation. Why does the union care about this issue?
- Summarize the union's point of view and present your "demand" or "ask". What do you want the council or committee to do?

Your argument

- Explain your point of view. Make your strongest arguments first.
- Present the facts and figures that support your arguments. Do you need the councillors to look at power-point slides or a document so they can follow any numbers that you present?
- Explain why everyone will be better off if they adopt the union's point of view; especially explain why this will be better for the residents of the municipality and why it will be advantageous for the councillors.
- Present examples from other municipalities where the approach the union is advocating works well.
- Explain why the union's position is better than other arguments.
- Personal stories can be persuasive, especially if they are about the people who use our services.

Conclusion

- Summarize the union's argument again, as you did at the beginning.
- Conclude with your concrete "ask" or demand to the council. For example: "We would like the council to vote against the recommendation to contract out cleaning of City Hall"; or "We would like the committee to recommend that operation of the new arena be carried out by city employees".
- Thank the council or committee for their time and attention.

If you are delivering the deputation, practice your presentation until you have a good feel for the information. It is okay to read the deputation in front of council. Just ensure that you know the words well enough to be able to make eye contact around the room, particularly when making important points.

KEEPING A RECORD OF COUNCIL VOTES

It is important to keep a record of which councillors support our issues and positions and which ones do not. It is useful to review that information the next time we need to lobby.

As we approach the next municipal election, we are going to want to know which councillors supported us and which did not when we make our decisions about who to support.

You don't have to keep track of every vote – that would be too much information to be useful – just the votes on issues important to CUPE – like votes about contracting-out, contracting-in, privatization, cuts to services. For example:

Contracting-out pool and arena operation January 2011	For	Against
Mayor	✓	
Councillor A		✓
Councillor B		✓
Councillor C	✓	
Councillor D		✓
Councillor E	✓	

There are two ways to know how each councillor voted.

Some council votes are “recorded votes”. That means the official minutes of the meeting will show which councillors voted which way. (One way to be sure to know is to ask one of our friendly councillors to ask for a recorded vote. If a councillor asks, it has to be recorded.)

The other way is to observe the vote yourself. It's best to have two or three CUPE members watching just to be sure you catch everyone's vote.







It can also be useful to keep track of the major arguments for and against that each councillor makes. That provides information you can use later about what is important to that councillor.

For the next election, you can make a chart that ranks councillors on those votes. The councillors at the top of the list most often voted to keep public services publicly delivered. The ones at the bottom of the list voted for contracting-out and cuts to services. Your local will want to support the ones at the top in the next election and run strong candidates against the ones at the bottom of the list.

Example: Violetville Council 2010-2014

	Contracting-out Pools and Arenas	Cuts to Library Hours	Resolution Against Bottled Water	Contracting-in Building Inspections
Councillor D	✓	✓	✓	✓
Councillor A	✓	X	✓	✓
Councillor B	✓	✓	✓	X
Mayor	✓	x	✓	X
Councillor C	X	X	✓	X
Councillor E	X	X	X	X

Checklist: Council watch

-  Check council and committee agendas in advance. Assign an individual or committee to monitor council and committee agendas as soon as they are available.
-  Make an arrangement with the clerk's office to have agendas sent to the local union as soon as they are available, if possible.
-  Keep track of contracts and bids being put out by the municipality.
-  Assign a "Council Squad" or individuals to attend council and committee meetings, or monitor the minutes after the meeting.
-  Make a deputation or delegation to the council or committee meeting when items are on the agenda that will affect the local union and its members.
-  Keep track of how councillors vote on issues important to the union.

INVOLVING POTENTIAL ALLIES

Your lobbying campaign will be much more credible if the union is not alone – if there are community groups and residents who will also speak out and mobilize against initiatives of council that work against public services and the union’s interests. Having allies will silence those who try to say that your local is just protecting its own members’ jobs. Try to get like-minded groups on-board including:

- Other CUPE locals
- The local Labour Council
- Progressive politicians from all levels of government
- Citizens’ groups that fight for progressive causes, local coalitions, social justice groups, such as the Council of Canadians
- Groups that represent the users of the services you are fighting for
- Important community members who might support your position, such as authors to defend library services and athletes to defend recreation services.

Do a “mapping exercise” to identify and list all the possible groups that may share your concerns and position. Approach these groups and invite them to meet to discuss the issue(s). Provide them with the information and research you’ve shared with the politicians. Ask them to participate by lobbying politicians as well, either in person or through written correspondence.

You may be surprised, but activists and groups within the community will also welcome your input and support where you have a common concern and goal. By reaching out, you can gradually form the basis of a very strong coalition that will help you with future issues that arise.

Continue to talk to your allies so that they take the same position on issues as much as possible. Ask them to do all the things you are doing: lobby politicians, make a deputation or delegation at a committee or council meeting, and attend the council or committee meeting when the union deputes.

On occasion, you may find that even your regular allies don’t entirely agree. Try to find common ground and go forward to work on those grounds. If you find, however, that you think they may say things to politicians that will damage your campaign, then don’t be critical, but don’t encourage their participation either.

Don’t forget your own members! Mobilize them to lobby.


Our members are residents and voters too (“taxpayers”, as our opponents like to say). Communicate with your members about the lobbying campaigns your local is doing. You may want to hold a special meeting to share your information and arguments, or raise the issue at a regular membership meeting. Survey the members to find out what community, activist, business and political contacts they might have and might be able to influence to communicate with the politicians.


Provide your members with tools to get important messages out into the community. Create information flyers that your members can bring into the community.


Find members who can speak concisely and sincerely with their community groups about the issue and encourage their contacts to also phone their elected councillor about the issue under consideration.

The more the general community is educated and speaks out on your issues, the more successful your lobbying efforts will be.

Checklist: Involving allies

-  Make a list of other individuals and groups in your community who will be affected by the issue you are lobbying about and may support the union's position. Include:
 - o Other CUPE locals
 - o Labour Council
 - o Local politicians and well-known community members
 - o Citizens' groups
 - o Groups that represent service users

-  Meet with potential allies to share information, find common ground and plan joint campaign actions.

-  Involve your own members as residents/voters/taxpayers.

TALKING TO THE MEDIA

The most important thing about the media to remember is that you can never control what is reported.

Always consult your CUPE National Representative and CUPE Communications when considering talking to the media. They can help you decide strategically if using public media is appropriate in the situation. They will also help you figure out the message to be used.

Media should only be approached when you think your message will resonate with the general public. Sending the wrong message to the wrong audience can turn public opinion against you and your goals.

Press releases can be issued and designed to encourage reporters to call a designated spokesperson on your issue. In this case, it is important to designate the spokesperson and make it understood that no one else speaks if called by the media. Your message through the media has to be very clear and concise. Reporters generally will not spend very long trying to understand the details of your issue.

Holding a press conference can be an effective tool. However, the issue has to be enticing for media outlets to send reporters out to cover your issue. You are not in control of what is reported from a press conference. CUPE Communications can guide your local's spokesperson through the process and advise you on the message and the "do's and don'ts" of speaking to the media.

Monitor local radio and television call-in shows that are discussing your issue(s). Get your members and allies to call in, as average citizens and tax payers, with a consistent message in support of your campaign to influence the tone of the opinions being called in.

You may want to invite the media to attend when the local union and allies make a delegation or deputation to council or a committee.

Work with your CUPE Communications Representative to invite the media to attend the presentation. They will assist you with:

- A list of local media to invite,
- A **media advisory** to go out the day before with "who, what, when and where",
- Choose and prepare someone to be the media contact,
- A **media release** the day of the event,
- A press conference, if you decide to have one.

Talk to your CUPE Communications Representative about other types of media. You may want to create a leaflet or flyer to hand out in your municipality. You may want to develop a website. It is good to have members and other supporters in the community write letters to the editor.

CUPE Communications can help you decide when to advertise in local newspapers, on the radio, on billboards or on transit shelters. This type of advertising is very expensive and requires advanced planning. Paid advertisements are generally used when you enter into a long term campaign with a simple and clear message.

March 2011

