



LOBBYING TOOLKIT

Building foundations for the future



Useful Documents

- > First, consult your collective agreement. Your agreement may set out some of the terms on how you communicate with your employer. In some cases, there are restrictions on communication with the employer. This is where the broader union or allies can help; they can act as proxies to carry the message you want to deliver.
- > There are key municipal by-laws or meeting regulations that you should be familiar with. For example, every municipal council must have a Procedures By-Law that details all the procedures council must operate under. Intimate knowledge of council procedure can be wielded like a weapon to ensure your voice is heard.
- > City Council's website – where the agenda is located, when the agenda is uploaded, the calendar of meetings, how to put yourself on the list to depute, rules that must be followed when attending a council meeting as an observer or as a speaker (I think some let you bring signs, others don't)

LOBBYING

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.
- 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?

Regularly and consistently – to maintain relationships with the councillors.

- > When there is a 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

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?
- > Who donated to their campaign?

Your CUPE staff representatives can be helpful here. They may already be acquainted with local politicians and staff. They can also facilitate access to additional CUPE staff in legal, health and safety, research, and communications. If given enough time, research and materials can be produced on the issue. These tools are very important to lay the ground for your arguments.

GETTING TO KNOW YOU

Meeting Checklist

- 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.

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. Don't waste valuable time lobbying politicians who won't be swayed.

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. This event could also be done with some of the community allies you have begun working with.

> 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. There are locals in CUPE that provide excellent examples of these programs, hosting movie nights, environment days, and more to engage councillors and the residents that receive services.

COUNCIL WATCH

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.

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. You may also be able to subscribe to email updates.
- > Negotiate a clause in your agreement that requires the city to make the agendas available to you as soon as they are public.

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), or other procurement tool 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.

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

ATTENDING COUNCIL AND COMMITTEE MEETINGS

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.

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.

Deputations

- > 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.
- > 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.
- > 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.

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 to urge them to attend the meeting. It is very important that your local members come out to the meeting.
- > 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.

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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 must be recorded.

2

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.

**At the meeting,
keep track of how
councillors vote.**

**There are two ways
to know how each
councillor voted.**

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.

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
- 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.

LOBBYIST REGISTRY

In some jurisdictions in Ontario (including the provincial government) there are accountability offices with oversight about communication to government – sometimes both elected officials and senior managers. These offices monitor and report on communications to their council or legislature and the public. Most commonly certain communications around development issues or by-law adjustments are recorded and reported to ensure there is some accountability on the business of the city. Unions, community groups, and other third parties are now mostly covered under this legislation/by-law.

A simple search of the municipal or school board website or a call to the clerk's office will make sure that you follow any rules the jurisdiction may have. It's important to be transparent about our activities; we have nothing to hide.

If you require support on registering the city's lobbyist registrar can be very helpful, or notify your national representative.

