

# UWOF CAPITOL DAYS 2023



Heart of Florida United Way

*Thank you to our generous  
Capitol Days Sponsors*



United Way of Broward County

*Thank you also to the United Way of Florida  
Public Policy Team for all the preparation,  
dedication and work that has gone into the  
development of our Consensus Agenda and  
this Capitol Days Event*

- Michael Griffin, UWOF Board & Advent Health
- Amber Miller, UWOF Board & UW North Central FL
- Daniel Vanegas, Heart of FL UW
- Graciela Noriega Jacoby, Heart of FL UW
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## Advocacy 101 in Tallahassee: 5 Things You Need to Know

### Make Introductions:

- Use the title Representative or Senator, even if you know them personally
- Identify yourself, that you're with United Way, **and** your company name
- If there's time, share why you support United Way and are here for Capitol Days

### Make it Quick:

- Appointments are 5-15 minutes and scheduled between committees & chamber sessions

### Be Brief with a Specific Ask:

- State your case in 2-3 brief sentences
- Follow with a specific ask
- Leave behind an issue brief

### Recognize Legislative Aides:

- are an important person to know in Tallahassee
- are the gatekeeper of information and visitors
- often knows the most about the issues and bills
- knows the schedule better than the legislator
- are spokesperson and right hand of the legislator
- are the ear of the legislator; what is said to them, is said to the legislator

### Know the Legislator

- Do your homework by reading the legislator's bio
- Know their background: history in office or other elected positions, committees, bills sponsored, personal info

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## Use these Tips for Successful Legislative Meetings

*When done correctly, meeting in person with elected officials and/or the staff of legislators is, by far, the most effective means of political advocacy. Here we share some crucial "do's" and "don'ts" to ensure your advocacy is successful and effective.*



### **Make an appointment in advance.**

Time is currency with Legislator. Contact the office in advance for a meeting, in writing (email) and follow up by phone. Be clear about who will be attending and the specific reason for the meeting. Legislative schedules are unpredictable. Don't be put off if you are rescheduled or, if necessary, meet with staff instead.

### **Prep in advance.**

Prepare carefully. Be thorough. Know your Legislator: review past votes or statements on the issue, party position, and committee assignments. As a group, develop and agree on a clear agenda. Know talking points and make your case. Research opposition arguments. If possible, acknowledge and rebut these.

### **Stay on message.**

Effective meetings should be narrow in scope. Stick to a single issue, state only a few key points supporting your position. Make a definitive request for action. Meetings are ineffective when participants stray from the talking points.

### **Go local.**

Legislators want to hear thoughts and opinions from constituents. Because legislators can access national or state analysis, reports and statistics, a useful strategy is relating the issue and your position to your community. Provide local statistics and stories, be the best source of rich information. Humanize the issue by tying it to your community or personal experiences.

### **Make clear, actionable requests.**

Don't be timid or worry that it's impolite to make a direct request. Your meeting is to secure support. Asking is appropriate and expected. The key is to clearly articulate. Ask for something actionable. Be timely and in line with the legislative process. Asking for generic support isn't usually enough. For example, ask a Legislator to co-sponsor a bill. Take the opportunity to evaluate the response.

### **Cultivate relationships with staff.**

Don't underestimate the importance of legislative staff. Doing so is the difference between success and failure. Key staff play an invaluable role in shaping agendas and issue positions. Cultivate positive working relationships and over time, staff will see you as a helpful resource on your issue/s.

### **Follow-up.**

What happens after a meeting is almost as important as the meeting. Send a 'thank you' letter. Express appreciation and reinforce your message. Note any verbal commitments made by the Legislator or staff. If you promised to get back in touch with additional information, do it. Failed follow-up calls your credibility into question. Also, report the results of your meeting back to UWOF. It is vital to coordinating overall legislative strategy and evaluating our advocacy impact. Even if the Legislator does not support your request, follow up with a thank you because you are building a long-term relationship.

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## Tips for Successful Legislative Meetings

*Effective advocacy has great rewards, but it does require being mindful of not making any mistakes, large or small.*

# Don't

### **Engage in partisan critiques.**

Keep to the merits of the policy or issue. Avoid characterizing positions in strictly partisan terms. You are working on behalf of an issue, not a party, and need legislators of both parties to support your position.

### **Use threats.**

While it may be tempting to tell a legislator who rebuffed a request that "you'll never vote for him/her again" or that "you pay his/her salary," discourtesy ensures your arguments will be discounted — now and in the future.

### **Be late.**

Time is a valuable and scarce commodity for legislators. Punctuality conveys professionalism and demonstrates commitment. Arrive early, especially if in a group, to allow a final review of the talking points and message.

### **Get too comfortable.**

Don't be surprised by a courteous reception, especially from lawmakers who disagree with your position. As a constituent you are accorded respect by the legislator and staff. Don't mistake this for agreement or let the comfortable exchange deter you from making your request. Also, don't mistake "concern" for your issue with support.

### **Forget to follow-up.**

Immediately send a thank you. Stay informed on your issue and track how your legislator responds. Did the legislator follow through on his/her promise? If not, request an explanation. If so, express your appreciation.

## Introduce everyone you meet to ALICE.

**ALICE** is the acronym for **A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed, with "employed" being the key word.

United Way's groundbreaking Florida ALICE Report spotlights the workers who collectively form the backbone of Florida's economy. These are the workers we all rely on for everyday supports and services. At United Way, we work with ALICE every day.

The 2023 ALICE Report, with updated data, will be released at the end of April.

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## PERSONAL VISITS WITH LEGISLATORS

### LEGISLATORS WANT TO HEAR FROM YOU

Meeting your legislator face-to-face, can be nerve-wracking. Keep in mind that legislators, and their staff, repeatedly say the information nonprofits provide is important when making decisions. YOU bring something to the table.

#### Legislators are often...

- very eager to win your support.
- hoping to put their best foot forward with constituents.
- sincerely interested in getting constituents' views on legislation.
- aware you are a potential expert on your issue – you have information that the legislator needs.

### UNDERSTANDING WHY TO MEET

There may be many reasons to meet with a legislator who is taking a leadership role on your bill – to thank the legislator for taking the lead or to learn how you can be helpful in developing support.

#### Meeting with your legislators may allow....

- them to share ideas or suggestions to help you focus your efforts on a particular bill.
- you to gauge their support or opposition to your position.
- you to become a resource to your legislator.

### PLANNING FOR THE MEETING

Often, you know considerably more about your subject than your legislator does. Legislators will welcome information and appreciate any anecdotes or illustrations that spell out the impact on people in their districts.

#### You should know that...

- meeting in advance to prepare is a necessity, as is, appointing one principal spokesperson.
- your group must agree on the objectives for the meeting and the points to be addressed.
  - more isn't always better - a delegation is effective but small meetings can allow for a detailed discussion and/or can foster frank comments about the dilemma the legislator faces in making choices on the issue.
- meetings in a district office may offer more time or flexibility.

### AT THE MEETING

- Present your view with conviction, but don't put anyone on the defensive.
- Cover the issue from the legislator's perspective, tying it in with his or her past votes or interests.
  - Listen attentively. Opening comments by the Legislator often give clues about how to connect your issue with his/her concerns.
- Don't bluff – If you don't have the answer, say so, commit to follow up and do so.
- Give responses to arguments the opposition will raise, but don't degrade your opponents.

### LEAVE BEHIND & FOLLOW UP

- Leave a fact sheet with a brief description of the issue, why it's important, and the action desired.
  - Give a copy to the legislative aide as well.
- Write thank you that recaps any agreements reached and provides any promised information.

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## United Way and Public Policy/Advocacy

**Through advocacy efforts United Way of Florida, with our local United Ways, builds collective impact across the state of Florida and, locally in our communities, by assisting their funded providers:**

- Preventing loss of resources – being positioned to stop a proposal that would cut funding and would hurt the communities we serve.
- Illuminating real community needs – advocating and educating legislators to highlight the needs in our communities regarding health, education, financial stability, housing, and the needs of A.L.I.C.E., etc. This allows legislators to engage in solutions with us and positions United Way as a resource to consult when considering legislation changes.

**Public Policy engagement is a unique niche for United Way among the non-profit community.**

- The presence of United Way in Tallahassee is visible and noted. In key committee meetings, we are one of the few non-profits that stand to waive in support of legislation.
- The relationships with legislators, their staff and statewide agencies has allowed United Way to create relevance, expertise and a voice in the statewide policy arena. In many ways this is unique. Without our engagement, we could quickly become irrelevant and unable to adequately protect our impact, agencies and communities when that voice is needed.
- Public policy advocacy has helped United Way to attract favorable media attention, generating higher visibility leading to increased awareness of our mission.

**United Way builds capacity for other organizations and constituents to engage in the policy process.**

- Every year, United Way of Florida hosts Capitol Days allowing for policy engagement with donors, volunteers and funded providers. While building an excellent volunteer experience, we also showcase the strength of our network to our legislators.
- Public policy helps to inform and strengthen our Community Impact programs by building a connection between local and state policy changes.
- The UWOF Public Policy Team provides technical assistance to the community, providers and constituents through outreach, engagement and education regarding legislation. This creates a pipeline to engage directly with legislators and promotes UW as policy experts, in our communities, adding to our overall value and relevance.

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## 60-Second Pitch

I am (Your Name) with United Way of (\_\_\_\_\_). We are here today with Florida's local United Ways for our annual Capitol Days event.

Our network, of 28 local United Ways representing every one of Florida's 67 counties, has joined together to promote action on issues impacting all our communities: Financial Stability, Children's Health and Affordable Housing.

We are asking, you, our legislator/s to assist:

Invest \$1.2 million in state funding to match the \$1.8 million local United Ways bring to the table to enhance opportunities for free tax preparation and result in dollars flowing back into Florida's economy.

Increase overall funding for affordable housing programs, including SHIP and SAIL; and focus resources to incentivize affordable rental-unit construction.

Expand access to health care by eliminating the fiscal cliff eligibility for Florida's child health insurance programs. Adopt a tiered-structure aligned with increasing household wages.

Thank you!

*We are working for the health, education and financial stability of for each and every resident in our community. Join us.*

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## Sample Email Request for Meeting with Legislator

Dear Representative/Senator (Last Name),

Florida's local United Ways will convene for our 2023 Capitol Days next week. I am a team member representing (United Way of \_\_\_\_\_) and would like to request an appointment with you next Wednesday (and/or add day/s as needed).

Also, from (name of county or counties,) I have joining me on our team (list each team member with their title/company). The purpose of our meeting is to discuss Financial Stability, Children's Health and Affordable Housing; and to seek your guidance and support for our United Way positions with these issues.

We understand that you are extremely busy but would appreciate any time that your schedule permits on Wednesday, February 22, 1:30pm or later and before (list the time you will be leaving) or (list any other time you are available). If you are unable to meet, we would like to request a meeting with your legislative assistant (insert name).

Thank you for considering this request. We look forward to meeting with you.

(List your name and contact information)

*\*\*\* Please schedule these meetings even if they conflict with Wednesday's Capitol Days programming, as the meetings are of the primary importance.*

**Send this email just over one week out, and then follow up by phone.**