



JANICE PALMER



RANDIE STEIN

## SUMMER CONFERENCE & EXPO

BY DON HARRIS

# Experts Caution – When Lobbying Lawmakers, Trust Is Difficult to Earn and Easy to Lose

Establishing relationships and maintaining your integrity are key elements in attempting to lobby and influence state legislators.

That message was stressed by a premier lineup of lobbyists with successful track records at the Arizona Capitol. They provided AASBO members with an overview of how the legislative process works and what to expect while promoting one side or the other of an education-related issue. The pre-conference workshop July 20 prior to the opening of AASBO's 63rd Annual Summer Conference and Expo in Tucson was organized by Chuck Essigs, AASBO Director of Government Relations.

The panelists were: Janice Palmer, Randie Stein, Meghaen and Marcus Dell' Artino and Geoff Esposito, Director of Policy and Programs for Expect More Arizona, which co-sponsored the event with AASBO. After Esposito walked attendees through the basics of life at the Capitol, including an explanation of often-used terms, Palmer, Vice President and Director of Policy for the Helios Education Foundation, told how to become part of the legislative process.

"Establish relationships with your legislators, as well as those in strategic roles, including staff," Palmer said. "Determine who your allies are in the local community and bolster those relationships. Above all, keep your word. Trust is hard won and easily lost."

If you're going to lobby, understand who has the power and on what issue. Palmer said you need to know who is championing the issue, what coalition that person brings to the table, and what your strategic pathway forward is.

"Even if a legislator opposes your position, thank them for meeting with you," Palmer said. "That's OK. They could be an ally on another issue. Build trust. One victory is better than no victories any day of the week. People come through when you least expect it."

Randie Stein of Stifel Nicolaus & Company, a full-service brokerage and investment banking firm, identified distinct missions at the Capitol. "You're either promoting legislation or trying to defeat a bill, which is equally important," Stein said.

You might want to educate a legislator or staffer on a general subject, a specific subject or your organization. Or, you might be trying to establish a relationship, she said. On relationship building, it could be a long-term alliance if the person agrees with your issues.

"Consider the timing," Stein said. "In mid-session, that's not the best time. The interim period between sessions is the perfect time."

In addition to trying to build relationships with legislators, Stein reeled off a list of individuals you should get to know, including staff members; researchers; Legislative Council, attorneys who actually write the bills; the Senate Secretary and the House Clerk;

the Joint Legislative Budget Committee staff; legislative Interns; and the School Facilities Board members and staff.

"Staff could be key," Stein said. "They could provide you with a key piece of information. They answer phones. They know the legislators' schedules. You should be able to recognize them in the halls. Staffs do the heavy lifting."

One of the most important aspects of trying to exert influence at the Legislature is being prepared. "There is no such thing as being over-prepared," Stein said. She noted that many hearings can be viewed online. "There is a lot of streaming, so you can see testimony without leaving your desk," she added.

Regarding preparation, Stein said, "Know the substance of the issue, know the law, including the rules and precedents, know the process, know the players and understand the opposition. You are not prepared if you don't know what people who are against you are saying. You're not even close to being prepared."

Being helpful is important. Stein suggested providing talking points to staff members who agree with your position, and making sure they know the opposition points. "Be available for questions from everyone, including interns," she said. "It's an all-consuming process. When you are at the Legislature, you are AT the Legislature."

The all-important aspect of integrity is primary. "That is all you have," Stein said. "Honesty – if you don't know the answer to a question, tell them you will get that information. Don't try to answer anyway – or you're done. When it comes to full disclosure, telling a senator you have a great idea isn't enough. You have to disclose how it will impact the tax rate for the average homeowner."

If an issue is resolved somewhere else in the process, make sure the legislator you dealt with knows. "Even those who agree with you don't like to be surprised," Stein said.

After getting support for an issue from a legislator, it's OK to then communicate that with a staff member. "But, don't ever overstate what the legislator said," Stein cautioned. "You will lose your integrity."

Some communication tips: have the correct bill number and title, be concise and efficient, and whatever you have written, including the description of a bill or an amendment, make sure there is nothing in the email you do not want forwarded to someone else, Stein said.

Be aware that making changes to a bill becomes more difficult as process progresses. "You may not get a second chance to communicate," she said. "Politics may enter into the situation. It

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may be unavoidable. Politics is more likely to come into play as the session progresses.”

Contract lobbyists Meghaen Dell’Artino of Public Policy Partners and her husband Marcus with FirstStrategic offered suggestions on what works and what doesn’t, noting that preparedness is half the battle. “Election time is game time,” Marcus said. “Everything in business is transactions – politics is no different. When you’re needed is when you are most powerful – right now through January.”

K-12 education is complicated with no easy solutions. Chatting with a legislator for five minutes in a hallway isn’t enough. You need to schedule more time, and now is the time to do that, Marcus said.

Meghaen recommended ways to build a relationship, such as offering to put a campaign sign in your yard and helping on a phone bank. “You want to fill your basket with as many chips as possible,” she said. “Build those relationships now, and they will return your calls. Meet all the candidates. See who supports education.”

They recommended doing research on who you will be contacting. Questions that should be answered include: What is their background? Do they have kids in school? Are they native Arizonans? Have they been in politics a long time? What is their party affiliation? What is their religion? What issues are important to them? What district do they represent and how will that influence their opinion.”

“Know the battleground you’re fighting on,” Marcus said. “They may want to help you, but most of their constituents do not. What are their hobbies and what do you have in common?”

Meghaen added: “Small talk builds rapport and helps find some common ground. Relatable people are trustworthy people. That’s Communications 101. Be positive. If you start negative, you won’t build a relationship.”

She recommended scheduling time with a legislator even if you don’t need them at this time. “Meet for lunch, not to discuss issues,” she said. “Be appreciative. If a legislator went to bat for you, even when you don’t like them or cannot relate to them, you must be professional. Mind your manners. Do what your parents taught you.”

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## UNDERSTANDING THE LEGISLATURE

By DON HARRIS

Geoff Esposito, Director of Policy and Programs for Expect More Arizona, offered a crash course on lobbying at the Legislature in a pre-conference breakout session.

- Arizona House of Representatives has 60 members; 36 Republicans and 24 Democrats.
- Arizona Senate has 30 members; 18 Republicans and 12 Democrats.
- Speaker of the House and President of the Senate decide which bills will be heard and which will not.
- Education Committees each have five Republicans and two Democrats.
- Legislature convenes on the second Monday in January when the governor delivers the State of the State Address, and remains in session for about 100 days, generally meeting Monday through Thursday, unless it adjourns sooner or extends the session by agreement.
- Sine die (without a day) means the Legislature adjourns, ending the session.
- SB 1000 and so forth indicates a Senate bill. HB2000 and so forth indicates a House bill.
- Striker or strike-everything is an amendment that completely replaces the original language of a bill.
- ALIS is Arizona Legislative Information System, which tracks all legislative bill activity.
- RTS is a Request to Speak computerized system.
- Dead generally means a bill is not going to advance.
- Feed Bill is the appropriations bill.
- Effective date is the 91st day after final adjournment, unless a bill has an emergency clause, which means it takes effect as soon as the governor signs it or it becomes law without his signature.

- COW is Committee of the Whole, when legislators debate bills on the floor of each chamber.
- Engross is the final version of an approved bill.
- First and second read are mostly perfunctory readings of bills.
- Third read is when bills receive final approval, without debate.
- Rules Committee can slow the process. All bills must go through the Rules Committee to determine their constitutionality.
- Caucus. Generally closed-door meetings of the members of each political party to discuss strategy.
- Conference Committee is used to resolve differences of a bill between the House and Senate.

Esposito noted that there are a lot of pitfalls in the legislative process and that only a small percentage of the bills introduced actually get to the governor. He advised:

“Every member of AASBO, whether they’re testifying in front of a committee or not, should sign up for the Request to Speak system. It’s the system the Legislature uses to gather public testimony to enter it into the public record, so even if you can’t speak before the committee you can still make your voice heard.”

Esposito added: “It is important to be respectful, knowledgeable and most importantly honest. Keep in mind that it’s OK to not know the answer to a question, but offer to follow up if you know the information is available. Always refer to members of the Legislature by their title, and try to address the committee through the chairperson. Above all, remember that the only way we get things done is if people are keeping our elected officials informed, engaged on and accountable to the issue we as education advocates care about.”

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The lobbying couple agrees that your goal should depend on what “season” of the game you are in. For example: election season – they need you; legislative season – you need them; interim season – neither of you need each other. And, no matter what season, your goal must be achievable.

Election season is the best time to build a relationship – reach out to all the candidates and refresh your relationship with the incumbents, Marcus said. During the legislative season, Meghaen said your goal is simple – pass or defeat legislation, which means getting at least 16 votes in the Senate and 31 in the House.

“A lot of lobbyists walk into a committee meeting and have no idea what the vote is going to be,” she said. Marcus added: “The cool, calm, and collected win in a world of chaos.”

During the interim season, Meghaen said, “Have a concise message that is easily understandable and explainable.” And Marcus advised: “Your non-verbal speaks volumes. Don’t roll your eyes. And, no matter what, stay on message. Actually, you should listen. You may learn something.”

Meghaen noted: “Stay on message. Most of the time you’ll win.”

In closing, Marcus had an observation for AASBO members who attended the Summer Conference. “You see all those vendors out there as wanting you to buy things from them. I see vendors who have connections to the chambers of commerce, people who can help spread your message to the business community.”

## WHO ARE THE PLAYERS IN K-12 EDUCATION?

Here are some of the policymakers and players involved in K-12 education identified by Janice Palmer, Vice President and Director of Policy for the Helios Education Foundation.

**K-12 EDUCATION PLAYERS INCLUDE:** Arizona Association of School Business Officials, Arizona Charter Schools Association, Arizona Education Association, Arizona School Administrators, Arizona School Boards Association, Education Finance Reform Group and the Greater Phoenix Education Management Council. Other advocacy organizations, not all of which support AASBO’s positions, include A for Arizona; the Arizona Chamber of Commerce and Industry and the Tucson Hispanic Chamber of Commerce; the American Federation for Children and Americans for Prosperity, both of which favor choice, vouchers and tax credits; Arizona Parent Teacher Association; Children’s Action Alliance; Expect More Arizona, which Palmer said is powerful; First Things First, pushing all-day K; Protecting Arizona’s Families Coalition; Read on Arizona; Stand for Children; Support our Schools Arizona; and Valley Interfaith Project.

**BUSINESS ORGANIZATIONS INCLUDE:** Arizona Business and Education Coalition; Arizona Chamber of Commerce and Industry, the biggest player at the Legislature; Greater Phoenix Chamber of Commerce; Greater Phoenix Economic Council, which is becoming more of a player, even statewide; Greater Phoenix Leadership; Northern Arizona Leadership Alliance; Southern Arizona Leadership Council, and Tucson Hispanic Chamber of Commerce.

**AMONG THE PHILANTHROPIES AND FOUNDATIONS ARE:** Alliance for School Choice; Arizona Community Foundation; Center for the Future of Arizona, which is led by Lattie Coor, former ASU President; Foundation for Excellence in Education; Goldwater Institute; Helios Education Foundation; Parsons Foundation; Rodel Foundation of Arizona, and Valley of the Sun United Way.

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