



Alliance Lobby Week February 20-24, 2012

State Toolkit



Use this toolkit to...

- Develop Legislative Talking Points
- Schedule a Lobby Visit
- Get Your Members Involved
- Set Your Agenda
- Sample Lobbying Agenda
- Determine Meeting Roles
- Plan and Track Your Progress
- Create Thank You Letters
- Develop a Follow-up Action Plan



President
Barbara J. Easterling

Secretary-Treasurer
Ruben Burks

February 2012

Dear Alliance Activists:

This year our key issues of Social Security and Medicare will again be subject to the spotlight in Congress. Attacks could come from several sources such as the House budget proposal this spring, from debt debates, and from attempts to repeal the Affordable Care Act. For example, by the time you receive this toolkit, the House will already have voted to repeal the CLASS Act.

This Presidents Day recess presents a great opportunity to tell Members of Congress and their staffs that the Alliance is here and watching what they do. During the week of February 20-24th, both the House and Senate will be in recess, and we are asking you to lobby them. Forces opposing our core programs like Social Security and Medicare have been spreading myths and outright lies focusing on seniors. They are using scare tactics and making outrageous statements that Social Security is bankrupt; that seniors will no longer be able to choose their own doctors; and that Medicare benefits will be cut. Enclosed is a copy of our toolkit, which I hope you will find useful for your visits.

During the coming weeks, let's separate fact from fiction and tell Congress:

- **Social Security is sound.** It has a surplus and can pay benefits through 2036. Let's make it stronger by raising the earnings cap and having a COLA like the CPI-E that reflects the true cost of living for seniors.
- **No Medicare privatization or vouchers.** The Ryan House Budget Plan would privatize Medicare and turn it over to private insurance companies in a voucher like system. Seniors would pay thousands of dollars more each year.
- **Keep the new Medicare benefits.** The Affordable Care Act has given seniors new benefits like annual wellness checkups and disease screenings at no cost. Plus the prescription doughnut hole is closing.

We have a unique opportunity in the coming weeks to make our hard work payoff. Join with your fellow Alliance activists and tell your members of Congress we're watching what they do. This toolkit should provide you with all the information you need to set up and conduct strategic lobby visits. If you need additional information please don't hesitate to reach out to us. Thank you for your continued activism.

A handwritten signature in black ink, appearing to read "E. J. G. H.", is centered on the page.

Executive Director

PRESIDENTS DAY RECESS LOBBY VISITS

IT'S THAT TIME OF YEAR AGAIN! READ ON TO LEARN ABOUT WHAT YOU CAN ACCOMPLISH DURING THE 2012 ANNUAL ALLIANCE FOR RETIRED AMERICANS NATIONAL LOBBY WEEK

GOALS

1. Reach priority Members of Congress in their districts with our established retirement security messages early in the second session of the 112th Congress.
2. Learn the positions of Members of Congress and their staffs on our core retiree issues.
3. Impress on them we are an organized and educated force in their CD/State and represent a constituency that votes.
4. Reinforce or develop a relationship with the Member of Congress and their staff.

STRATEGIES

1. Do fewer, more priority visits, lowering the overall quantity but improving the quality of visits with the expectations below.
2. Convey to priority Members of Congress that seniors across the political spectrum – Republicans, Democrats and Independents – oppose damaging changes to Social Security and Medicare.
3. Educate priority members on Social Security and Medicare solvency and the dangers of raising the retirement age and other benefit cuts.
4. Show that seniors in that state or district agree with our positions on Social Security and Medicare.
5. Make sure meeting participants go into the meeting informed on the member's previous statements on Social Security and Medicare.

TIMELINE

1. February 1st : Release of Alliance Lobby Week Toolkit to Field
2. February 8th : State President's & Regional Board Conference Call
3. Feb 1st – Feb 17th: Contact your Members of Congress to set up in district meetings
4. Feb 20th – 24th: National Lobby Week
5. Feb: 27th – 29th: Send lobby report back forms to National Alliance

What's Our Message - Headline Lobby Week Talking Points

There is much already in the news about potential “Entitlement Reform,” which includes the Social Security and Medicare systems. Alliance Lobby Week is the opportunity to let our members of Congress know where we stand on our key issues and that we want to work with them on a regular basis to achieve full retirement security for all seniors. Here are some internal key talking points of issues that you can use to brief Alliance members that will be speaking at your lobby meetings:

Medicare and Medicaid

- Stop the Ryan House Budget Plan that would end Medicare as we know it and turn it over to private insurance companies with a voucher like system.
- Make Part D work for seniors, not drug and insurance companies. Allow Medicare to negotiate to prices, create a Medicare-run Part D program, and eliminate the doughnut hole.
- Stop Medicaid cuts and don't turn it into a block grant program. Millions of seniors rely on this program for their long term care.

Social Security

- Say no to Social Security privatization. In spite of the public's repudiation of the Bush scheme in 2005, the privatizers are still trying to scare the public into believing Social Security is on the brink of insolvency.
- The system has enough funds to pay full benefits through 2036. Even Alan Greenspan has stated that Social Security is within 2% of being sound for the rest of the 21st century.
- Raising the earnings cap on Social Security withholdings would go a long way to keeping Social Security safe and sound. President Obama endorsed raising the caps during the campaign.
- Support the CPI-E COLA formula to better reflect seniors' needs.

President's Day Lobby Week In Depth Talking Points

- More than anyone, seniors want to lower the deficit – we don't want a big debt to the legacy we leave for our children and grandchildren. But the fact is that Social Security has not added one penny to our budget deficit. The program is fully-financed by worker and employer contributions. In fact, Social Security has a \$2.6 trillion surplus today.
- We must not balance the budget on the backs of retirees. Social Security did not create our nation's fiscal problems, nor should it be used to fix them. The current debt situation should not be political cover for attacking Social Security. Social Security is based on a promise: If you pay into the system then you earn your guaranteed benefits. This is one promise that politicians should not break.
- The CPI-E is a better measure for a COLA. Support Senator Sherrod Brown's bill, S. 1876, to change the COLA formula to the CPI-E.
- Cutting benefits and raising the retirement age, as proposed by the co-chairs of the recent Fiscal Commission, will result in extreme economic hardship for current and future retirees. The proposal is an attack on middle class Americans.

Alliance position on Social Security:

- Do not cut the Cost of Living Adjustment (COLA); change it to the CPI-E
- Do not raise the retirement age
- Do not cut benefits

- Do not gamble away our retirement savings through a privatized Social Security system run by the big Wall Street firms
- Make Social Security solvent so it can pay out 100% of promised benefits after 2037 such as raising the earnings cap so that income above \$110,100 is taxed.

Alliance position on Medicare:

- We oppose the Ryan Plan proposed in the House budget to privatize Medicare by turning it over to private insurance companies in a voucher like system.
- We oppose raising the Medicare eligibility age. Raising it would leave millions of older Americans with great uncertainty about health care coverage and affordability.
- We oppose means testing of Medicare. It is a universal insurance plan covering all beneficiaries equally regardless of income.

For additional and more detailed talking points, please see attachment/sample information packet section for our **Fact Sheets and Issues Briefs, Including:**

- Social Security, Medicare and Medicaid: What's at Stake in 2012
- Social Security and Medicare 2012 Facts and Figures
- Fact Sheet on Paul Ryan Republican Budget
- Myths and Facts about the Affordable Care Act
- Chained_CPI & Social Security Benefits

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Scheduling Visits

Here are a few tips when working to set up meetings with your legislators:

Early Bird Gets the Worm! Scheduling policymakers especially when they are home for a brief recess can be very difficult because of the competition for their time. You should start the process as soon as possible.

Relationships are important! Identify an Alliance member from the legislator's home district who has a relationship with the policymaker to schedule the appointment and keep that person as the point for all communication with the office.

Constituents Get Priority! Stress when you are scheduling the visit that you are bringing seniors from the legislator's home district to speak about issues in their community. Ideally, have a constituent make the call to schedule the appointment.

Don't Be Discouraged! Sometimes it can be difficult to connect with the legislative office. Try to be patient but persistent by leaving a phone message request and following that up with a formal request through fax and/or email. If you still do not get a response, identify an Alliance member who is a donor or has an established relationship with the legislator to make the connection.

Double Check Your Date! Call the office a couple days before the meeting to ensure you are confirmed on the calendar.

Preparation is Key! Even if you are bringing experienced activists to the visit, you should ask everyone to come at least a half hour before the appointment and meet in an easy to find place. This time should be used to reiterate everyone's roles in the meeting, to review the key issues and asks and to talk about the legislator's voting record.

Talk About What Happened! As you exit the legislator's office, make sure to take at least 15 minutes to debrief with the members who attended the meeting to discuss what everyone heard in the meeting and identify next steps. Thank your members for attending the visit.

Thank You! Saying thank you is one more way to connect with your legislator and reiterate your asks. Identify a follow-up point person to send a thank you letter and to respond to any information requests that came up during the meeting.

If you QUESTIONS about setting up visits or need HELP, please call Rich Fiesta at 202-637-5271 or email Rfiesta@retiredamericans.org.

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Involving Your Members

Alliance Lobby Week is a great time to engage your members across the state, grow their understanding of the legislative and lobby process, and increase their interest in participating in advocacy in the future on key issues, and to show value in their membership with you. Here are some suggestions during and after lobby week of ways to engage and to grow your active membership:

1. Get commitments of participation from your members across the state.
2. Ask Alliance members in the elected official's district to attend the lobby meeting with that legislator. Ask a few new members to attend.
3. Identify Alliance members to take leadership roles in the meeting.
4. Hold a press event to kick off or close out Alliance Lobby Week where a larger number of your members can participate. Identify a number of people who can tell a personal story about Medicare and/or healthcare to the press.
5. Bring Alliance t-shirts and hats for your members to wear to the meeting and record the visits with a camera, emailing or mailing photos to the DC office.
6. Encourage your members to write letters to the editor, especially in congressional districts where you are meeting with legislators.
7. Organize calls into the offices of elected officials during Alliance Lobby Week to reiterate your issue and engage members who cannot attend the visits.
8. Engage your members in internet and web-based advocacy in partnership with national.
9. Thank your members for visiting their elected officials during Alliance Lobby Week and ask them to participate in a report back meeting.
10. Hold a larger membership meeting after Alliance Lobby Week, inviting your affiliates, where members who attended lobby visits report back about their experience, what the elected official said, and next steps.
11. Send a letter to your affiliates to also report back on the lobby visits and ask them to get involved in a follow-up action.
12. Strategize with your Board of Directors about follow-up action.

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How to Structure Your Agenda

Here is a sample agenda for your Alliance meeting with your policy makers:

1) Identify Yourself and the Group You Represent.

Make sure the elected official knows who is in the room, and is clear about the Alliance's electoral power in the legislator's district. Leave with the legislator an information packet about the organization and your key asks.

2) Get the Meeting Started – Be Aware of the Time!

Meetings usually run not more than 45 minutes. Make sure you are aware of your meeting start and end times. After introductions, begin with a word about why you wanted to meet with the Member and what you hope to gain from the meeting.

3) State Your Position Clearly.

Tell the elected official the key facts on your issue, being sensitive to what this particular legislator is interested in. Be clear and specific about what your position is on the issue. For example, do not just ask that the official to support Medicare. Ask them to support a specific bill or change to Medicare.

4) Get the Elected Official to Take Action.

Ask specific questions including how your elected official stands on your issue. Ask for a clear position on your issue, and do not give up until you have an unmistakable "yes" or "no." If the legislator is supporting you, ask for a specific action in support – such as introducing legislation, cosponsoring legislation, or holding a press conference with Alliance members.

5) Leave Behind Additional Information.

Leave information that gives more details on your issue, reminds the legislator of your meeting and provides your contact information. Mention the Alliance website, www.retiredamericans.org and our Regional Conferences in 2012

6) Follow Up.

Write letters thanking the elected officials for their time and reminding them of commitments made to you during the meetings. Include any additional information they requested in the meetings. A sample letter is attached.

7) Debrief.

Talk about how your meetings went, come to agreement on the minutes and what happened in the meeting, and discuss how you could refine your message in the future.

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Key Lobby Visit Roles

While not everyone on a lobby/advocacy visit needs to speak or have a specific role, before the meeting, you should identify four people to fill the following roles:

Facilitator

This person leads the meeting and controls the agenda. The facilitator makes sure the meeting runs smoothly and that your group hits all of your agenda points in the time allotted. If the legislator has a question, the facilitator decides who will answer the question.

Always respect the facilitator and each other, and **do not interrupt!**

Timekeeper

This person helps the facilitator stay focused and on schedule. The organizer serves as timekeeper and is the only person that should communicate with the facilitator during the meeting.

Note Taker

This person is in charge of taking notes during the meeting. You need an accurate account of what was said so that others working in your organization will know the outcome of the meeting. It is also important to keep track of commitments made by you or by the elected official.

Witness

This person is ideally directly affected by the issue you are there to, and has a compelling story to tell. Witnesses are the heart of your meeting, because they bring a face and a name to your cause. Try to have at least one person who can talk personally about the issue.

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Lobby Preparation

Roles

- a) Facilitator: _____
- b) Organizer: _____
- c) Note Taker: _____
- d) Witness: _____

Identifying Your Electoral Power

How many people do you represent in the state? _____

How many people do you represent in the legislator's district? *(Need help figuring out this number? Please contact Juan Johnson at 202-637-5288 and he can tell you how many national Alliance members reside in your state / CD)* _____

What is the list of organizations that make up your coalition?

Your Goals for the Meeting

What are the 3 points of your message that you want to convey to the elected official?

- a. _____

- b. _____

- c. _____

What do you want the legislator to agree to in the meeting?

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Suggested Lobby Visit Agenda

1. New Members or their district staff is given introductory materials on the Alliance, including information regarding the state Alliance.
2. Incumbents can be reminded of the Alliance structure as appropriate.
3. Member or staff are told of polling that shows support of the current structure of Social Security and Medicare across the political spectrum (included in talking points and leave behind)
4. Member or their staff are given a quick overview of the Alliance's key points on Social Security and Medicare, (full explanation of points on documents in leave-behind folder):
 - a. Social Security solvency through 2036, small changes would extend solvency for decades.
 - b. Mention state-specific stats from the Social Security Works reports.
 - c. Social Security has not created our national debt.
 - d. Lowering benefits and the COLA and the percentage of retirees relying on Social Security for the majority of their income.
 - e. Problems with raising the retirement age.
 - f. One way toward solvency is raising the earnings cap.
 - g. Change the COLA to the CPI-E.
 - h. The Ryan Plan for Medicare will significantly raise retirees' health care costs.
5. Participant with Social Security story gives a brief version of it.
6. Member or their district staff are asked the Member's position preserving these key elements of Social Security and Medicare.
7. Participants establish a timeline for both parties to follow up with the Member's district or DC office on outstanding issues, including any additional information requested from either the Member or asked of the Alliance.
8. If the Member of Congress is present at the meeting, be sure to get a picture with them and your group.

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LOBBY REPORT BACK FORM

(Please submit back to the National Alliance)

Member's office visited:

Member or staff in visit:

Participants in meeting and their roles:

Member's or staff's response to Alliance talking points, personal stories:

Raise Retirement Age for both programs:

Cut COLA/CPI-E Change:

Cut Benefits for both programs:

Raise earnings cap:

*Ryan Plan:
programs:*

Means Testing for both

Follow-up commitments from the Member's office (with timeline):

Follow-up commitments from the Alliance participants (with timeline):

Any follow-up needs from the national Alliance:

Please submit via fax to 202-637-5398 or
via email to: Araorganizing@retiredamericans.org by February 29th, 2012.
Your reports help our Government Affairs Department lobby more
strategically in DC

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Sample Thank You Letter

Sending a thank you note after your lobby visit allows you to reiterate your positions and to provide responses to questions raised at the meeting. Ideally, an Alliance leader and/or constituent who spoke during the lobby visit will hand write the thank you note. Below is an example language you can use for a thank you note:

Dear Representative _____,

On behalf of the State Alliance, thank you for meeting with us on (insert date) about the importance of Social Security, Medicare, and Medicaid. As a member of your home district, I see seniors who are struggling every day to afford healthcare, housing and food. Medicare and Social Security are critical programs that must be preserved and strengthened, not by privatization, but by improvements such as (insert one or two of your policy asks).

As you recall, we shared that [a very brief summary of what you presented]. We were interested to hear [put in writing what you heard from the Member and/or their staff].

As promised, attached is the information on the question you raised on [topic]. We look forward to hearing back from your office regarding [topic].

I also wanted to follow-up with you on the question you asked us about _____ (respond to any questions or concerns the elected official had).

We appreciate your interest in retiree issues and hope you will defend Social Security and other senior issues in the 113th Congress and beyond. If you have any further questions, please contact [Alliance staffer or state Alliance leadership].

Sincerely,

Name
State Alliance Member

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Media Work Around Your Visits

1. Photographs

We encourage you to take pictures at your meeting and/or outside of the congressional office. These can be very useful to share with your members, post on your website or Facebook page, or use in a future publication. The national Communications department maintains a collection of Alliance photos, so please send us a copy at:

ARcommunications@retiredamericans.org

2. Sample Letter to Editor for Your Local Newspaper

Recently members of the [state] Alliance for Retired Americans met with [Member's office] to discuss the facts and importance of Social Security and Medicare for seniors and others in our community. We heard [content of meeting]. We hope seniors and others will let [Member] know [e.g. how much we appreciate their support; that Congress should keep their hands off Social Security].

Social Security and Medicare are great American success stories – they help millions of retirees afford to pay their bills and stay healthy. We must keep these programs strong for generations to come. Let's all let Congress know that current and future retirees are counting on them!

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Next Steps

1. Please mail/fax/email your Lobby Report Back Form to the Alliance Washington office before Wednesday, February 29th, 2012. **Fax to (202) 637-5398**, email to **Araorganizing@retiredamericans.org**, or mail to 815 16th Street NW, 4th Floor, Washington DC 20006).
2. Send a thank you note to the legislator and to your members who attended.
3. Respond to any follow-up questions or request from the legislator in a timely manner.
4. Identify members to write letters to the editor about our issues and our members' engagement in the political process.
5. Update national Alliance staff on the progress of the meeting and send any photos that you took of your Alliance Lobby Week activities.
6. Hold the legislators accountable to any commitments they made during the visit. Track legislation that you asked the elected official to support and follow-up with letters, phone calls and visits if they have not acted on the legislation.
7. Keep your members involved by sending them the Friday Alert and additional information about upcoming legislation and actions to forward that legislation.

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Sample Informational Packet for Members of Congress

Many advocacy organizations leave their members of Congress with a packet of information about their organization, along with important information regarding their key issues after a lobby visit. We suggest that for each member of Congress you meet with during Lobby Week, you leave a folder of information that could potentially include:

- (1) One page fact sheet about your state Alliance (sample on next page)
- (2) Fact sheets and issue briefs from the Alliance for Retired Americans (updated briefs are at the end of this packet)
- (3) A copy of the latest “Friday Alert”
- (4) A copy of the National Alliance Legislative Conference Call
- (5) The latest copy of your state newsletter
- (6) Contact information of your state leadership
- (7) Flyers or other information on upcoming Alliance events in your state

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SAMPLE FACT SHEET ON THE ALLIANCE

The Alliance for Retired Americans is a nationwide grassroots organization representing over 4 million retirees and 32 State Affiliate organizations that advocates on behalf of America's seniors.



Our mission is to advance public policy that protects the health and economic security of older Americans.

Our goal is to educate, energize and mobilize seniors to make a difference through activism.

Leadership: President – Barbara Easterling; Secretary-Treasurer – Ruben Burks; Executive Director – Edward F. Coyle.

Departments: Government & Political Affairs – Richard Fiesta, Director; Field Mobilization – Dani Pere, Director; Communications – Michael Buckley, Director.

To learn more about the Alliance and become involved in our mission to protect the health and economic security of older Americans, visit our website at www.retiredamericans.org or contact us toll free at 1-888-373-6497.

The (INSERT STATE) Alliance for Retired Americans

is the state affiliate of the Alliance, representing ____ retirees and over ____ affiliated organizations.

INSERT LOGO

Our mission is to advocate for progressive policies that ensure just and equitable living conditions for seniors both in Pennsylvania and across the nation.

Our goal is to create a statewide network of organizations that represent retired union members, senior and community activists and their families who work in coalition to educate and inform the membership, the public, and elected officials about issues that affect the well-being of (INSERT STATE) seniors.

Leadership: President – _____;

To learn more about you can get involved with the (INSERT STATE) Alliance for Retired Americans, please contact us at _____ or email _____.

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SAMPLE LETTER TO THE EDITOR

After Your Visit:

Sample Letter to Editor for Your Local Newspaper

#1

Recently members of the _____ Alliance for Retired Americans met with _____ to discuss health care and retirement security issues. He/She was very supportive of ways we can improve the quality of life for seniors here in _____. We are all very fortunate to have a good friend in _____.

#2

Recently members of the [state] Alliance for Retired Americans met with [Member's office] to discuss the facts and importance of Social Security and Medicare for seniors and others in our community. We heard [content of meeting]. We hope seniors and others will let [Member] know [e.g. how much we appreciate their support; that Congress should keep their hands off Social Security, Medicare, and Medicaid].

Social Security and Medicare are great American success stories – they help millions of retirees afford to pay their bills and stay healthy. We must keep these programs strong for generations to come. Let's all let Congress know that current and future retirees are counting on them



SAMPLE PROMOTIONAL FLYER to
ADVERTISE WITH YOUR MEMBERS

SAVE THE DATES!

**Join Alliance for Retired Americans' members across
the nation for:**

ALLIANCE LOBBY WEEK
February 20-24, 2012
(During Congress' Presidents' Day Recess)

Alliance members worked hard in 2011 to educate and mobilize seniors to vote for positive change. Now in 2012 we collectively face huge challenges to protecting and preserving the Social Security, Medicare, and Medicaid programs. Join with the Alliance as we lobby members of Congress and educate them about critical retiree issues.

Alliance Lobby Week will include:

- *Lobby visits in legislators' home districts during the Presidents' Day Recess*
- *National media campaign including press releases, web advocacy and letters to the editor*
- *Kick-off press events in the states*

We hope that your state will join us in this Lobby Week to kick-off 2012 advocacy efforts, strengthen relationships with members of Congress and raise the profile of Alliance. Informative background materials, talking points on retiree issues, and lobby guides will be provided to participants.

INSERT STATE CONTACT INFORMATION HERE