Association Concepts Inc.

GOVERNMENT RELATIONS FOR CANADIAN ASSOCIATIONS

Advocacy in Canada

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Introduction

This document is provided for the use of clients of Association Concepts. It is intended to give an overview of key issues in lobbying and also contains some templates of different types of communication you may wish to use in your government relations efforts.

In this document, we have used "government relations", "lobbying" and "advocacy" interchangeably. From a government perspective, however, the activity is referred to as "lobbying" and one who undertakes it is a "lobbyist" (whether s/he is required to register as such or not).

What Associations Bring to the Table

Government officials frequently are not experts in the industry for which they develop policy. Associations can provide that expertise. They bring three key things to the table:

1. Their boards and membership represent an important base of practical experience in the industry
2. They speak with a collective voice, allowing government officials to deal with one group instead of many
3. They tend to represent a large group of voters to whom government is likely to listen

From a government perspective, the advantages include:

1. Ease of communication, replacing hundreds of constituents with one association
2. Associations can help build consensus within their constituencies, and offer considerable industry-specific expertise
3. Associations can provide a cost-effective partnership for administering government policy

When dealing with government, associations need to be aware and mindful of the government's own agenda, its motivations and its constraints, and to **address these issues** in their dealings with governments. Government priorities can be identified through:

- The Speech from the Throne
- Budgets
- Major Policy Papers
- Requests for Consultation

Arguments phrased in terms of, and aligning with, these priorities are more likely to have a positive result.

Part 1: General Approaches to Lobbying

Your association may take one of four approaches to its lobbying/advocacy efforts:

1. Volunteers (the Board of Directors or a Government Relations or Advocacy Committee) take the responsibility and carry out the lobbying activities
2. A professional government relations/advocacy firm carries out lobbying on behalf of the association
3. Your Chief Staff Officer (Executive Director, Chief Executive Officer, Operations Director) assumes the responsibility and conducts advocacy activities
4. Some combination of the above

In determining the approach you choose, consider that the federal government, all provinces except PEI, New Brunswick and Saskatchewan, and some municipalities, have legislation governing lobbying. The purpose of this legislation is to ensure transparency in lobbying by various parties.

Definition of a Lobbyist

An organization is considered to be a lobbying organization, and subject to registration as such, if staff time beyond a certain threshold goes to lobbying activities (this is usually measured quarterly and the threshold is generally the *equivalent* of 20% of one person's time. Alberta and BC, however, define it as 100 hours over a 12-month period). **Volunteers are not considered as lobbyists and are not subject to regulation or registration**.

What "Lobbying" IS

Within the meaning of the legislation, lobbying generally is:

- Communication with a public office holder
- For remuneration, reward or other benefit
- In an attempt to influence the development (passage, adoption, amendment or defeat) of a legislative proposal, rule, regulation, by-law, policy, program or decision
- Or the awarding of any grant, contribution or other financial benefit

The above is the definition from the Newfoundland and Labrador *Act*, but other legislation is broadly similar.

The federal legislation and the legislation of all provinces except Manitoba and British Columbia also consider "grassroots communication" to be a lobbying activity.

What Lobbying is NOT

Within the meaning of the legislation, lobbying generally is NOT:

- Oral or written submission in a matter of public record
- Oral or written communication regarding enforcement, interpretation or application of any Act or regulation or the implementation or administration of any policy, etc. by a public office holder
- Any written submission in response to a request for such

- Oral or written submission to members of the provincial or federal parliament or a municipal council
- Unless it concerns the introduction, passage or amendment of a private bill for the benefit of a constituent

Once again, the above is from the Newfoundland and Labrador *Act*, but other legislation is broadly similar. Note, however, that the above activities may well form part of your overall advocacy program.

Who is a "Public Office Holder"?

Broadly defined, a public office holder is:

- A politician (member of federal or provincial parliament (including a minister of the government), a senator, a mayor or a city councilor) or his/her staff
- A senior government official (deputy minister, assistant deputy minister, associate deputy minister, chief executive officer or comparable rank) or his/her staff
- A person appointed to any office by the Governor in Council (federal) or a Lieutenant Governor (provincial)
- An officer or director of any agency of the government or his/her staff
- A member of the Canadian Armed Forces, the RCMP or provincial or municipal police force

In other words, almost anyone in public life is a public office holder. The definition excludes representatives of a foreign government and their staffs, and members or representatives of the UN or a UN agency.

Any person or organization engaged in lobbying, as defined above, must file regular returns with the government s/he lobbies. These returns are quite detailed, encompassing both past and planned lobbying activities. Public relations and government relations firms should be familiar with the registration and reporting requirements, should you choose to employ them.

We have prepared a comparison of the federal and provincial legislation (except that of Quebec) as regards in-house lobbyists; for further information, please ask your lead staff person for a copy. The relevant federal or provincial *Act*, of course, should be regarded as the authoritative source of information.

We encourage clients either to assign lobbying activities to one or more volunteers (who have the in-depth industry expertise) or to an outside organization (which has the contacts and appropriate infrastructure). We are happy to support volunteers in their lobbying efforts.

Caution: if you use a public relations or government relations firm as part of your lobbying efforts, you should ensure they are properly registered or plan to register for the work they do on your behalf. This avoids embarrassment and reputational risk for your association.

One further note: legislation generally prohibits a public office holder from engaging in lobbying activities for a period of time after s/he leaves office. Accordingly, you should not approach such a person to participate in your lobbying activities in any way whatsoever.

Part 2: Preparing for Advocacy – Developing a Plan

In order to be successful in your advocacy efforts, you should bear in mind that you want to demonstrate how the public will benefit, directly or indirectly, from adoption of your viewpoint. This, along with addressing governmental priorities, will help you in achieving your advocacy goals and should underlie your lobbying strategy.

Your advocacy takes place in an ever-changing environment, so your advocacy plan (like any other plan) should be flexible enough to account for those changes. This means that you should constantly be aware of events that affect your activities and be willing to adapt or adjust your plan to deal with them. That said, you can be either reactive or proactive in your lobbying. Proactive lobbying permits you a greater degree of control because you "get there first". Reactive lobbying, however, is sometimes necessary when someone else has taken the initiative.

Developing Criteria

To begin with:

- Identify the resources, in terms of time (volunteer activity and staff support) and money, you want to devote to advocacy. If you decide to use a public or government relations firm, find out what that will cost (you may want to issue an RFP – Request for Proposal – for this; if so, there are other steps to take before doing so)
- Determine who will steer the advocacy effort. This may be a standing advocacy committee or an ad hoc committee charged with a specific issue. If you decide to use an outside firm, you may even have it report to the full Board, although we do not recommend this.
- Identify, in broad terms, the guidelines you will use to determine the issues on which you will lobby. Factors to include in guidelines may consist of:
    - Determining the importance, relevance and benefits (direct and indirect) to both members and the public
    - Conducting an environmental scan to determine how much "competition" you will have on any given issue
    - Identifying specific costs (again, time and money)
    - Determining fit with the association's strategic or business plan
    - Estimating the length of time advocacy will take (if you are advocating for a new Act or changes to an existing one, for example, this will likely take a year or more)
    - Estimating the likelihood of success on a specific issue
- Apply the guidelines to determine specific issues (this may well be annual)

You most likely will find that there are multiple issues on which you want to advocate; generally, it is not a shortage of issues but a scarcity of resources that is your primary constraint. Thus, it is critical that you choose issues that are important and relevant to your members. You may wish to survey your membership to find out where they want you to focus (your lead staff person can assist you by setting up a survey using our online survey facility).

Mapping Out a Plan

Once you have decided on the issue(s), you will need to develop a plan. This applies even if you are going to use the services of a government or public relations firm;

only the level of detail will vary (less, if you use a firm; more, if you "do it yourself"). The following steps apply regardless of the approach you will take:

- Fully understand the issue. You can't lobby for something unless you do. This means knowing what the issue really is, and considering the arguments on all sides
    - If you are advocating proactively, you may have to do some research and creative thinking to accomplish this, because the different positions may not yet be set
    - In this step, remember that there are facts and there are *interpretations* of those facts, and two opposing views may well be based on the same set of facts
    - On a complex issue, such as taxation, you may want professional (legal or accounting) help
- Determine your position. Easily said, but not always easy to do, this is nevertheless critical. A large part of your success will depend on the extent to which your membership supports your position, and coming to a landing on an agreed position may take a considerable period of time (however, see *"Emergency" Situations* below)
- Know the facts and interpretations that support your position (the more you can cite, the further ahead you are) and those that detract from it (so you can address them). This helps establish your credibility with all parties. You may, at this point, find you need to conduct research and want to enlist professional assistance with this
- Develop a concise (one- or two-paragraph) statement of the issue, your position, and your key supporting arguments. This not only helps keep you clear on what you are doing, but provides a document that can be worked into press releases, letters and other short communications
- Identify your ultimate goal and interim objectives. In other words, what will success look like, and how will you know you are getting there? Some of these may be easily defined (e.g., notifying the members of the position), but others may take some work
- Decide what compromises you are willing to make. It is generally unlikely that you will get everything you want, and you will find your association needing to make concessions. Knowing what these are in advance is important. However, you should not indicate initially that you have a fall-back position, let alone disclose what that position is
- Develop a position paper to present your case. This should include:
    - Your definition of the issue
    - A brief statement of your position
    - The arguments that support your position, both factual and anecdotal (providing real life experiences of your members helps personalize the issue, especially when you are dealing with elected officials)
    - A refutation of the arguments that counter your position (again, using both facts and, where possible, anecdotes)
    - A summary of original research, if any, you conducted
    - If your position paper is lengthy, develop a one- or two-page executive summary

At any point after you have identified your position, you may decide to issue an RFP to public and governmental relations firms. The more you can tell them about what your position is, and what its supporting arguments are, the further ahead you are. Remember that use of an outside firm represents a trade-off between volunteer time and a cash expense. Professionals in the field may have extensive experience and contacts that will enable them to be more efficient and effective than your volunteers, but you *will* pay for it.

If You Go It Alone/Work Collaboratively With an Outside Firm

If you decide to use volunteer resources rather than relying entirely on an outside firm, your plan should also include the following considerations (if you work collaboratively with a firm, this information will be valuable to them):

- If you are lobbying reactively, determine where your issue is in the decision-making process (this may govern your choice of audience in the next step)
- Identify your target audience(s). In your short statement, you have an elegant summary of the issue and your stance, while your formal position paper provides all the details. Working from these two documents, you will need to tailor your communications, and that is not possible unless you know your target audience(s). They may include elected office holders, unelected government officials, other associations and the general public, as well as your own members. Think about:
    - Who can promote your position (for example, if you are in favour of a new Act or significant amendments to an existing one, this may be the responsible Minister; for regulatory matters, it may be a Deputy- or Assistant Deputy-Minister or head of a government agency)
    - Who can influence a decision in your favour (there may be a person or group of persons with sufficient stature in your community of interest that you can approach to assist you; remember, though, you may have to persuade them first)
    - Who can support your position (other, related associations or groups, your membership, the public, the media, etc.)
    - Who makes the decision (political decisions are usually made by the provincial or federal parliaments and by city councils; administrative decisions are at the bureaucratic level)
- Determine whether, and to what extent, you will use the media and media-oriented events (press conferences, public forums, etc.). Media representatives tend to work quickly, so you will want to ensure you have someone knowledgeable available to respond to questions – there is no point in giving out a press release for immediate use if there is no one to field media queries
- Consider the role technology will play, both as a way of gathering *and* disseminating information. You can research your issue and the different positions being taken on the internet, use e-mail to encourage members to take action or distribute press releases, and post your position paper, press releases, and other documents on your website
- Decide who will approach whom. The person who makes the initial contact may not be the one responsible for presenting the detailed case, and an initial contact at the Ministerial level may be followed up by a detailed discussion at a lower level
- Decide on the specifics of your message to each of your target audiences (the core message should remain the same). Whether you approach only one person or multiple stakeholders, you will need to tailor your message as it is possible that neither a short statement nor detailed position paper will suffice. Consider:

- The interests and needs of the person(s) you approach. An allied association will be concerned about the effects of your position on its members, so address that; an elected official, as noted above, will need to know how your position fits in with government policy and offers a public benefit
- Your expectations or desired outcomes from the different audiences. If you expect something specific from them, you will need to ask for it
- The time your audience(s) can give you. A government Minister likely has less time than an appointed official, for example
- The steps of the process. For some issues, you may want to start at a senior level to establish contact and interest, do most of the substantive work with a lower level, and bring it back to the senior level for conclusive action. At each step of the process, your communication will differ

- If appropriate, you may want to appoint a single spokesperson, either for the association in general or for a particular issue. This person should obviously be well-versed in the issue and the association's position, and comfortable in communicating it to the various audiences. S/he should also be in a sufficiently senior position within the association to have credibility in speaking on its behalf
- Decide on the timing of individual steps – who do you approach first? If there is a secondary level, who there will you approach, and at what stage?

At this point, you want to have your plan stated completely but concisely, so you can start working on it.

As you put your plan into action, you will want to:

- Keep your members informed of steps and progress (steps are the actions you have taken, progress is the result(s) you have achieved)
- Continually be aware of changes that occur. This may be a resignation or new appointment to a position with which you are dealing, or the entry of a new player, presentation of new facts and interpretations, or a shift in public attitudes
- Consult your members when necessary. If the landscape changes or an unexpected event occurs, you may need to go back to your membership to consider what changes are necessary
- Look at strategic alliances with other interested groups. This has already been discussed above, but is something to which you will want to be open as your effort progresses
- Avoid the temptation to respond to every single side issue or unrelated issue, as this dilutes your resources and, potentially, your credibility (particularly if you wind up stating a position that does not have wide support amongst your membership). Even large associations with significant resources focus their advocacy efforts

"Emergency" Situations

If media outreach is part of your ongoing advocacy plan, you may (and hopefully will) reach the stage where members of the media will contact your association looking for comment or opinion on an important and relevant issue. Bearing mind the above point about maintaining focus, the key words here are "important" and "relevant". As part of your strategic and advocacy planning, you should be able to identify such issues; even if you ultimately determine they will not form part of your active advocacy agenda, you still may want to have positions on them. Alternatively, you may have one or a number of in-house experts (members knowledgeable about those issues) on whom you can call for comment. If, however, you are not in a position to comment, you should refrain from doing so, particularly if the issue is outside the association's defined area of expertise. It only takes 15 seconds publicly to put your foot in your mouth, but it can take months or years to extract it.

Part 3: Federal and Provincial Governments

A Note on Government Structure

When approaching government, it is useful to know which level you should meet – federal, provincial or municipal – and, within each level, who you should approach.

Under the Acts that apportion government powers in Canada, the federal government is responsible for some things, while provincial governments are responsible for others. The table below gives an extremely broad overview of the division of powers between the federal and provincial governments; it is not an exhaustive list.

Federal	**Provincial**
Defence	Property and civil rights
Criminal law	Administration of justice
Employment insurance	Natural resources and the environment
Postal service	Education
Census	Health
Copyrights	Welfare
Trade regulation	Municipalities
External relations	• Water
Money and banking	• Sewage
Transportation	• Waste collection
Citizenship	• Public transit
Aboriginal peoples in Canada	• Land use planning
	• Libraries
	• Emergency services
	• Animal control
	• Economic development

There are areas of overlap – for instance, federal responsibility for transportation includes ships, railways, canals and interprovincial transportation, but the provinces are responsible for their own highway systems. In addition, although the federal government regulates trade, money and banking, each province has a securities commission to govern publicly-traded companies registered in its jurisdiction.

Government at all levels (including municipal) consists of elected officials and appointed staff. Much of the detail work is carried out by staff, and they often have significant responsibility for the operation of their departments, ministries or agencies; even senior staff (Deputy Ministers, Assistant-Deputy Ministers, CEOs, etc.) are not necessarily political appointments, so their tenure is generally longer (and more secure) than that of the politicians to whom they report.

All of this is to say that you should make your approaches to the right person(s) at the right level of government.

Federal and Provincial Elected Officials and Staff

Elected officials employ staff with various responsibilities and titles to help them function properly. Especially at the Ministerial level, this staff can be quite large. The degree of authority exercised by each staff person will vary depending on the elected official employing him/her. Following are typical positions within an office, along with their responsibilities:

- Chief of staff: Usually a position in a federal or provincial government Minister's office. Overall responsibility for advising on legislative proposals, political decisions and constituency matters. In charge of office operations
- Director of Policy: Usually a position in a federal or provincial government Minister's office. Works with departmental officials on policy implications of political decisions
- Policy Advisor: Usually a position in a federal or provincial government Minister's office. Supports the director of policy. Is usually an advisor on only a limited number of issues
- Director of Parliamentary Affairs: Usually a position in a federal or provincial government Minister's office. Works with a Minister's caucus colleagues, parliamentary committees and the legislative process
- Legislative Assistant: Usually a position in a federal or provincial government Minister's office, or in the office of a member of the opposition who serves as a member of the "shadow cabinet". Monitors legislation and policy issues, and advises on government procedures. In opposition offices, helps develops questions for Question Period
- Director of Communications: Usually a position in a federal or provincial government Minister's office. Responsible for the Minister's communications with the public, stakeholders and the media
- Press Secretary: Usually a position in a federal or provincial government Minister's office. Responsible for interacting with the media and as the Minister's spokesperson. In smaller offices, also performs the duties of director of communications
- Special Assistant: Handles day-to-day affairs, including scheduling, correspondence and some constituency casework
- Scheduling Assistant: Responsible for allocating the Minister's or MP's/MPP's/MLA's time. In smaller offices, often performs the special assistants' tasks
- Executive Assistant: At provincial level, often play the role of chief of staff. For MPs/MPPs/MLAs, often function as legislative assistant as well
- Constituency Assistant: Responsible for resolution of constituent-related matters

When considering who you should see, do not forget members of opposition parties. If your agenda is related to a specific riding, you may well be dealing with a member of a party not in power. On larger issues, it is useful to build as broad a support base as you can, and opposition party members can be included. Even if they do not support you on that issue, you will still have begun building a relationship with them, and that may be helpful if their party forms a government.

When to Start

While you should not begin lobbying efforts on specific issues until you have made the preparations outlined in Part 2, we recommend introducing your association to those with whom you are most likely to be dealing at the earliest opportunity. The easiest way to do this is by a letter to the appropriate person. Your letter would explain what the association is and does, who it represents and why they are important (see Appendix 1 for a series of sample letters for various eventualities from a fictitious association). If you have information about the association (magazine, newsletter, association overview, etc.), you may wish to include that. If you plan periodically to send information (industry trends, association events and initiatives, etc.), indicate that in your letter.

General Tips for Letters

Here are a few tips for writing to government officials (elected or otherwise):

- Generally, keep your letter short and simple. An exception to this is a response to a consultative or discussion paper that poses specific questions that you choose to answer in the body of the letter instead of in a separate document (more on this below)
- Always have a purpose for your letter, and state what that is (preferably in your first paragraph)
- Unless you are asking for government assistance on a specific issue, phrase your letters to show you are being helpful – presenting the views of your constituency so the government can understand them better; offering recommendations or a response to a specific government initiative; identifying a new initiative that addresses overall government policy, and on which you can work with government, etc.
- Always state who you are, what your constituency (your members) is, and why government should listen to what you have to say
- Always tie back to government policy. For example, when stating why government should listen to you, do so in terms of government priorities (e.g., the economic benefit your members provide; environment-related issues on which you have been active and that are important to the government; consumer protection initiatives you support; etc.)
- Provide whatever documentation you think would be useful to assist the recipient of your letter to understand who you are and what is important to you. This might include Corporate Social Responsibility (CSR) initiatives your organization has taken (e.g. supporting environmental sustainability by being a paperless organization), surveys showing your membership's profile, etc.
- If there are "next steps" you plan to take (e.g. contact the recipient to set up an appointment, subscribe him/her to your newsletter, make an appearance before a Committee or Subcommittee, etc.), include them in the letter. Take the initiative
- When commenting on a particular government action or initiative, begin by acknowledging the benefit government hopes to achieve; do not, even when disagreeing, disparage the action, its purpose or the government
    - Always restate the problem in your own terms, reflecting the issues that are important to your members
    - Maintain a positive tone, even if your position is a fundamental disagreement with the government proposal
- When responding to a consultative or discussion paper:
    - Be responsive to the questions posed in the paper. Provide a full discussion, from your perspective, on each question
    - For each question, state your recommendation (in as much detail as necessary) after having discussed the issue
    - At the end of your letter (or any separate response), summarize your association's bottom line position on the entire paper
    - Be formal, as this document will likely be published on a website
- Whether your letter (and supporting documentation, if any) is reactive or proactive, be sure to identify your association's criteria for a successful

recommendation, taking into account the government's core purpose (e.g. protecting consumers, promoting transparency in organizational processes, or supporting environmental sustainability)
- If you are being proactive, show how your proposed initiative supports established government priorities or policies while being honest about how it meets your members' needs

General Tips for Briefs

Sometimes, a committee is appointed to review proposed legislation or other matters. Such a committee often invites briefs from interested stakeholders, and sometimes uses the briefs as a factor in determining what individuals or groups it invites to attend and present at a committee hearing. The following guidelines have been established for submission of briefs to a committee of the House of Commons:

- Briefs may be submitted in either official language, but are not distributed to committee members until they have been translated. If you are submitting a brief in only one official language, send it to the clerk of the committee well in advance to allow sufficient time for translation
- The brief should contain factual information to substantiate the views expressed and/or claims made
- If you make recommendations to the committee, especially in terms of suggested amendments to bills, be as specific as possible
- The name and address of the association should be clearly indicated on the title page
- The brief should not exceed ten pages in length
- If you include recommendations throughout the text of the brief, they should be summarized at the end of the brief for ease of reference
- Explanatory notes (footnotes, citations, etc.) should be placed at the end of the brief
- Any reference materials used should be clearly indicated
- Photographs, logos, line drawings, graphs, tables and charts should be in black and white, as all committee documents are copied only in black and white, and other colours may not photocopy well
- Photographs, in addition, should have a glossy finish
- If you are submitting a brief in both official languages, consult the clerk of the committee about the number of copies required

Some provinces may have similar requirements in regards to use of official languages, and most governments at the provincial and municipal levels have similar rules about the format of briefs in general. When in doubt, check with the clerk of the committee for information.

Part 4: Meetings with Government Officials

Letters are a useful way to establish and maintain relatively formal contact with government officials. Advocacy, however, is about relationship building as much as it is about conveying a position on an issue. If you have an established relationship, based on personal contact, you are more likely to get a hearing on an issue of importance to your association.

Informal Opportunities

You never know when you might meet a potential governmental contact, and many times you may do so in an unexpected fashion – in an elevator, in a hallway, on a flight, etc. These are opportunities of which you can take advantage if you are prepared.

Judge these opportunities carefully. Ideally, they should be in a business-related setting. You would likely avoid approaching an official in a supermarket checkout line on a Saturday, but would almost certainly want to do so if you are seated together on a flight where you both are on business (i.e., the official is not seated with family members).

If you have time, you may find this process helpful:

- If you recognize the person, introduce yourself ("Mr. Jones, I'm Jane Doe")
- Establish a mutual context ("You must be getting ready for the opening of parliament (alternately, you may wish to mention, in a positive light, a recent appearance or achievement by the person) I'm travelling to (or 'I'm in') Ottawa for the annual meeting of my association.")
- Assuming some level of interest, give your "elevator speech" (see below)
- Thank the person for her/his time ("I appreciate you taking the time to talk with me. It is a pleasure meeting you") and, if appropriate, exchange business cards [Note to Board members: you should ideally have an association business card; if you don't, write the association name on the back of your regular business card.]

The above assumes a very brief contact. However, if you meet on a flight, you likely have more time and can spend longer on general "chat" before getting to your "elevator speech". In any case, carefully gauge the other person's level of interest; if s/he is clearly not interested, don't push yourself and your association forward. Politeness counts.

<u>The "Elevator Speech"</u>

This is a tool borrowed from sales, and there has been much said and written about it. The elevator speech is, ideally, a speech that can be delivered in the course of an average elevator ride (15-30 seconds). It is a concise statement of what your association is, but presented in such a way as to capture another person's interest. Key elements of an elevator speech are:

- Introduction ("Hi, Mr. Smith, I'm Jane Doe with the Canadian Federation of Independent Truckers – we represent truck owner-operators across Canada."

- Point of interest ("Chances are excellent that one of our members has transported a number of things you use every day. Independent truckers carry about x% of all freight that moves by road in Canada.")
- Make it local, if you can; this is another way of relating the information directly to the person with whom you're talking ("Actually, we have y members in your riding/region/province.")
- If time and circumstances allow, identify a current issue or immediate concern ("Right now, we're trying to address environmental concerns caused by truck emissions, while still keeping our members financially viable.")
- If appropriate, suggest you will call his/her office to arrange a follow-up meeting

Important things to be aware of are:

- While an elevator speech should be planned and rehearsed, it shouldn't *sound* that way
- Everyone on your Board and your key staff people should know the elevator speech and be able to deliver it conversationally
- Recognize it for what it is – an opportunity to open doors; developing the relationship happens apart from the speech – perhaps even at another time
- Be sensitive – if you are not getting any signs of interest or feel you are interrupting something, stop! A foregone opportunity today may lead to a much better one at some future time

Arranging a Meeting

The next step is to arrange a meeting. Most officials have a staff person who handles this for them, and you will rarely deal directly with the official in setting a date and time for any meeting. The information on page 11 will help identify who does what in an elected official's office. Senior staff people (Deputy Ministers, etc.) also have a designated person – chief of staff, appointments secretary, scheduling assistant or similar – with whom you will talk.

When you request a meeting, be prepared to provide the following information:

- Purpose and/or topic of the meeting
- Names of attendees
- Background on your association
- Your preferred date/time/location
- Anticipated length of the meeting

Providing this information in writing (as an e-mail confirmation of your verbal request, for example) may increase your chances of success in arranging the meeting.

Pre-Meeting Preparation

Be very clear what your desired outcome from the meeting is. If it is helpful to you, you might want to prepare notes on the key points you intend to cover, in the proper sequence. If you plan on bringing your notes with you, have them typed and make sure they are clear and not overly terse (to avoid any awkward "what did I mean by that?" moments). Bullet points are best in this circumstance – the point of the notes is to jog your memory, and not to provide a script for you to read. If you are comfortable speaking "off the cuff", and are able to do so concisely, so much the better; if not, however, you are further ahead to use notes or, better still, have someone else lead the discussion.

As a courtesy to the person with whom you will meet, you may also want to provide them, ahead of time, with:

- The names, titles and some relevant biographical information on any delegation you are bringing (include yourself here). You should restrict your contingent to no more than three to four people (including yourself) to avoid any impression that you are trying to overwhelm the person with whom you are meeting
- A background note that includes the issue or concern that sparked the meeting and any recommendation your association is making
- General information on the industry or group you represent

You only have a limited time with the government official; including the above as pre-meeting information helps keep the meeting focused and avoids wasted time. This information also helps the official prepare. Keep this short, however – two pages total is a good target.

If you are bringing anything with you (charts, documents, etc.) to share with the official, ensure it is in the order in which you will use it, that it is clean, clear and neat, that it is relevant to the topic/purpose of the meeting, and that it is self-explanatory without being overly long. You may want to bind it or put it into a folder for a more professional presentation.

It may be useful to you to rehearse the meeting – possibly more than once. If you choose to do so, all of your group's meeting participants should be there, you should have someone play the part of the official, and you may want to have an "observer" to identify any areas of concern. Rehearsal serves several purposes:

- It helps you keep your presentation clear and properly sequenced
- It gives you a sense of how long you are taking, and may help you identify areas you will need to shorten or could even omit entirely
- It can assist you in identifying gaps in your presentation (having an observer who is not familiar with the association or industry is very useful here as s/he may be able to identify important points that you, because of your familiarity with the industry and its issues, may have assumed were common knowledge)
- It helps ensure you know your material cold
- If you experiment with having different members of your group lead the conversation, it may help you choose a spokesperson

One last note: as mentioned above, lobbying is regulated federally, in most provinces, and in some municipalities. Whether or not you are required to register as a lobbyist, you should be familiar with the governing legislation. Where there is a Code of Ethics, Conduct, Behaviour, etc., you should familiarize yourself with it and, to the extent applicable to your situation, abide by it. This can save endless problems in the future.

The Meeting

Every successful meeting, whether in person or by teleconference, follows a general framework or outline:

- **Introductions:** thank the official for meeting with you and briefly introduce your colleagues (if any)
- **Purpose:** briefly summarize the point of the meeting. If there is a direct tie-in between the official (or his/her riding, region or province) bring it up here
- **Discussion:** remember that the discussion should be exactly that, and not a monologue. In addition to presenting whatever you have to present, it is even more important that you determine the official's reaction and get his/her feedback. If s/he disagrees, find out the reason and respectfully present your counter-arguments; do this as soon as you identify a disagreement, since waiting until "later" may indicate to the official that you haven't heard him/her. If you raised a tie-in during the "Purpose" stage of the meeting, expand on it here. If you want the official to do something for you, ask for it specifically
- **Help:** ask the official if there is anything you can do to assist him/her. Remember that a purpose of all your contacts (letters, emails, meetings, phone calls, etc.) with the official is to build a relationship and nothing promotes that like being of assistance
- **Wrap-up:** summarize what you have accomplished and the next steps for both you and the official, and thank him/her for the meeting

Helpful Hints for a Successful Meeting

Government officials, whether elected or not, are the same as everyone else – they want to know "what's in it for me?" (WIIFM). For members of federal or provincial parliament, WIIFM can often be dealt with by identifying the tie-in between your organization and its issue to the official's riding, region or province. In a sense, the answer to WIIFM is your value proposition for the official, so it's very useful to identify this before you go in and to be clear about it during the meeting. If you know that one of your members is prominent in the official's riding, region or province, don't hesitate to raise that in conversation (it is a good idea to make that member aware that his/her name will come up during the meeting, and that s/he may hear from the official).

When you are dealing with WIIFM, be sure, if you can, to weave local examples. Using our mythical trucking group, and assuming the meeting is dealing with alternate fuels, you might discuss the benefits your members who are part of his/her constituency would reap and then widen it to show the effect on the entire area. If the meeting relates to a restriction on your members that you would like to see changed or removed, discuss how it affects the members and how that plays out over the area, and then point out the positive ramifications of making the change.

When meeting with a government Minister (or even a member of the shadow cabinet), you will, of course, also want to illustrate the national (or province-wide) effects, both positive and negative, as the case may call for, as well. Even at this level, however, it is useful to show some local tie-in; eventually, the person with whom you're meeting will be standing for re-election and will have to face local constituents.

Your offer to help is also part of WIIFM. During this part of the conversation, be careful not to overpromise; if you are not sure of your ability to do something, say so clearly. You are much further ahead to express doubt first and then actually deliver than you are to be positive that you can do it and then fail to deliver. Overpromising and underdelivering only serve to hurt your credibility with the official and, because people talk about these things, it may spread beyond that person. It goes without saying that if you know you definitely cannot do something, you should state that in no uncertain terms, explaining why not.

One of the things you should definitely be able to do is to connect the official with stakeholders in his/her area. This works for both of you: it provides an opportunity for grass roots feedback to the official and it connects your members with him/her (a plus for your organization). If the official doesn't bring this up, you may want to suggest it. If you do, you should be careful to ensure that the meeting actually gets set up – don't just pass the contact on without any follow-up as this can (again) hurt your credibility.

If you are dealing with an un-elected official, WIIFM can be harder to determine. At the very least, you should ask how you may be of assistance. Making that person look good to his/her "boss" (this may be an MP/MPP, Minister, the Prime Minister/Premier or the entire cabinet) is always a plus, and it doesn't make any difference how senior s/he is (obviously, you need to be careful in handling this – don't say "wouldn't this make you look good?"). Some un-elected officials also have constituencies:

- A senior official's (Deputy or Assistant Deputy Minister) constituency may be the public his/her Ministry serves
- An official of a crown corporation or other government agency is responsible to the users of that corporation/agency's services (as well as to the government who appointed him/her)
- A military or police official (should you ever have reason to meet with one; remember, they are included in most definitions of lobbying) has a particular command – geographic, departmental or otherwise – of which they are mindful

Keep idle chit-chat to a minimum – the person with whom you are meeting is busy, and spending 10 minutes on opening or closing pleasantries when you've asked for a 30 minute meeting indicates you are not respectful of his/her time or your own. As you develop a relationship with the official, you may be able to relax this rule somewhat, but do so with care. Remember that "How are you?" is often just a polite question and does not call for you to give chapter and verse on what is happening in your life – a simple "Very well, thank you" and a similar question on your part often suffices. You can (and should) still be friendly and cordial without becoming too personal, unless that is the nature of your relationship.

Post-meeting

You have undoubtedly heard the old saying that "once all is said and done, more is said than done". To avoid that being true about your meetings follow-up in a timely fashion with a letter or e-mail thanking the official, and briefly recapping the purpose of the meeting, any agreed actions and timelines. For the things you have promised, set reminders for yourself of the actions and due dates, and then follow through.

It is also helpful to keep a file (electronic or paper) on the person with whom you met; include notes of each meeting, steps to be taken, and progress made. This serves not only as a reminder to you but is a way of quickly getting someone else in your organization up to speed should you need to hand this contact off (either partially, temporarily, or completely and forever). It also is a way for you to track information that can then quickly be conveyed to the official's successor. This way, there is a reduced risk of gaps in furthering your organization's advocacy efforts.

Other Opportunities

As you gathered from the sample letters, you needn't wait until you have an issue on which you want (or need) to take political action. In fact, the best time to establish a relationship with an official is when there is no immediate need. The contact strategies outlined above all contemplate this, and are very useful ways of starting the relationship building process. By beginning early, before you have a need for government action, you actually may gain more credibility and build stronger relationships; as a result, you may get a better hearing (and better handling) than otherwise. It makes sense, then, to look for additional opportunities to create and strengthen ties with officials.

- Does your organization have Chapter/Branch, regional or national business meetings? These offer a way to connect with politicians or other officials by inviting them to speak or, if the meeting is more social in nature, to attend and get to know your members
- Do you have a conference? Involving politicians or other officials as keynote speakers helps build bridges with them. This doesn't mean just inviting them to bring greetings from the level of government they represent; provide them with information on the conference topic or a subject on which they might speak, so their presentation has more value for them, connects them with your members, and fosters a mutual understanding
- Are there multiple jurisdictions with which you work? Offer to bring key officials from all relevant jurisdictions together for a closed-door discussion of their common issues – this is particularly effective at the Deputy or Assistant Deputy Ministerial level. You may leave the room during the closed-door discussion or may stay as a minute taker. While some provincial Ministries have formal methods of connecting with one another, not all do (especially below the Ministerial level); this is an opportunity for your association to be of service to a group that may later be able to help you (note this is best as a sustained effort rather than a one-off event, as it may take time to get participation from a wide range of officials)
- Do you have a publication (newsletter, magazine, e-newsletter, blog, etc.)? Then you're surely familiar with the problem of finding content. One way of doing so is to invite a government official to write an article on a current topic of mutual interest – a government initiative (either current or proposed) that affects your members, an explanation of an upcoming relevant public policy consultation, or similar topic

Trade-off

When you provide a speaking or writing opportunity to an official, there is a trade-off: s/he will use the opportunity to promote him/herself, his/her political party and his/her government (if that party is in power). Usually, officials keep this within reason, as they recognize it is not your primary interest, but it will occur.

Managing the Contact

When extending such an invitation, be as specific as possible regarding the topic. Provide any material that will be useful to the official in understanding your association's position on the subject. Other useful information you should include is:

- For a speaking opportunity, date, occasion, start and end times and duration; whether there will be a question period, and how that fits into the schedule. It is also a good idea to provide the name and cell phone number of the senior on-site association contact or event organizer, in case the official runs into a delay (s/he will usually inform you of this, and contact information eases the process)
- For a writing opportunity, deadline date, publication date, projected length (in words, not pages), any writing guidelines you may have, and any "bonuses" you may provide (author's copies of the publication, etc.). You should also include the contact information for the publication's editor, in the event the official has additional questions

When you are inviting an individual to speak, you will not ordinarily get (and should neither expect nor ask for) a "preview" copy of the speech, even if it is a major policy announcement. For significant announcements, the official will want wider publicity but will use his/her own media group for this. Your organization may be mentioned as the host group for the speech, but will not likely receive significant attention in any media release the official issues. If, however, you are aware that the speech will be important and that media may be present, it is worth your while to have some information available on-site about the organization.

For both speaking and writing opportunities, you should provide the official with information on your audience – a membership profile such as you may supply to potential advertisers for your publication is helpful; for a conference, where only a "slice" of your membership is likely to be present, you should also indicate who they are (e.g. "while our membership consists of people from all parts of the industry, and of different levels within their organizations, the conference is typically attended by senior decision-makers", etc.).

Capitalizing on Opportunities

You've invited a senior government official to speak at your conference or business meeting, and s/he presents something that is vital to your membership (and perhaps makes a key policy announcement). This is an opportunity for your association, and you should be ready to take advantage of it. How? By issuing a press release. In addition to helping raise your public profile, a press release is a way of showing interest and appreciation to the official involved.

Even if the speech is not particularly newsworthy to the general public, it may still be of interest to your members, and it is worth your while to prepare an article for your publication summarizing the speech. This should appear as close after the actual event as possible. You may want to reserve space in the next edition even if you haven't got copy yet – that way, if the speech is in June and your publication is issued in July, you still have the chance to get the word out. You may request a copy of the speech for this, or may have someone taking notes and choose to use them – either will assist you in writing the article.

Part 5: Special Situations

Over time, you may find yourself in some specific situations not covered in the preceding material. This section deals with some of the more common.

Elections

Federal and provincial governments may call an election because they are close to their term limits, they feel they may be able to increase the size of (or gain) their majority in the legislature, of they have fallen as the result of a non-confidence vote. Municipal elections are often mandated by provincial legislation to occur at fixed intervals. Such elections *may* provide an opportunity for your association to increase awareness amongst the political parties or candidates, and to bring your members (or your broader stakeholder community) into touch with those who would represent them. One way of doing this (especially if you have identifiable issues that are relevant in the election) is by hosting an election debate, town hall or similar event.

Before even beginning on an event like this, assess its chances of success. To get candidates out, you will need to demonstrate that your membership represents a solid voting bloc (or potential voting bloc) that is relevant to him/her. An event with poor attendance may do more harm than good.

You face two challenges with debates, etc.:

- Getting all the candidates to attend
- Getting the members to attend

Neither of these is as easy as you might think, based on our experience, so you should be prepared to devote some time to both.

<u>Helpful Hints</u>

Here are some tips you may find useful if you decide to stage a debate, town hall or similar meeting:

- Start your planning early. Not only should the event be planned sufficiently far in the future, but you should ensure there is plenty of time between your first notice of the event and the date itself
- Map out your promotion strategies early. Have strategies for candidates, members, non-members and media
- Canadian voters are somewhat apathetic around elections, so be aware that your event may well suffer from a low turnout too. If you are committed to the event, consider including a phone-out campaign to members as one of your strategies
- For a federal or provincial election, ensure that the parties you wish to invite have nominated candidates for your area
- Unless your situation is extremely large and powerful, do not expect to attract the party leaders – you will be inviting local candidates
- Your issues should be relevant to the riding(s) in which you plan to hold meetings – if your focus is agriculture, it is unlikely you will attract anyone in a metropolitan area

- Select at most three ridings for meetings, even if you plan to invite members from outside those areas (unless you have considerable resources, both in your main office and on the ground)
- For a municipal election, determine if you will invite the mayoral candidates or focus on one or more wards and invite only those candidates
- Choose a location that is accessible both by car and (if applicable) by transit. People who have to take 3 or 4 buses are unlikely to attend, so a location on a subway line, light rapid transit line, or similar option, is a better choice
- Getting people to a debate or town hall where they have to pay even a token admission is a guarantee of failure; your meeting should be free
- When inviting members and the general public, be sure to indicate that, while the event is free, pre-registration is required. This will give you some idea of numbers and may help in making a go/no-go decision

These events are definitely not "if you build it, they will come" events. One of the decisions you will need to make is who to invite first: candidates or attendees. If you get a large attendance but no candidates show up, the event is a failure. If you get all the major candidates to attend but there is no audience, the event is a failure. Unfortunately, there is no "right" answer to the question, and you will have to make an arbitrary decision.

<u>Getting Candidates to Attend</u>

As noted above, it can be difficult to get candidates to commit to attend your event. Here are some issues to address:

- Candidates are more likely to attend if you can show that your membership (or those qualified to be members) constitute an important or influential voting group in their riding, ward or city/town. Back this up with statistics, if you can, and make them relevant to the candidate – if you are planning to host a meeting in a riding or ward, be able to show what portion of that area's voters fit your membership criteria and, beyond mere numbers, why they are important to the candidate
- Include information on your organization. Even if the candidate knows you, his/her campaign staff (who will most likely handle the invitation) may not
- Identify the key issues you would like the candidates to address, and provide enough information to enable them to do so properly. Be sure to show why the issues are important to your audience and, by extension, to the candidates
- Provide information on the format of the event with your invitation, along with the location, date, time and any special accommodations for candidates (if you will make tables available to candidates for their election information, say so, and note when their campaign staffs should arrive for set-up; if you have a room set aside in which candidates can prepare, let them know that and indicate when it will be available; etc.)
- If you plan on imposing time limits on opening and closing remarks, responses to questions, rebuttals, etc., indicate what those are in your invitation
- If you have some pre-planned questions to be asked by the moderator, send those to the candidates well in advance. Even if the questions are only in draft, they will indicate areas where the candidates may wish to do research
- Follow your written invitation up with a phone call and/or e-mail. A single contact is unlikely to be enough to get a response. Your follow-up should be

to the candidate's campaign scheduling person (**not** his/her office scheduling person; incumbents have campaign and office staff structures that may be parallel but almost never intersect)

- You may wish to be inclusive in your invitations to candidates and invite all the candidates in the riding, ward, city or town, but it may be a good idea to resist this impulse.
    - In municipal elections, there are often "fringe" candidates; inviting them adds extra time to your event, complicates your organizational task, may not add value to your event and may well not be appreciated by others. Limit your invitations to the leading "serious" candidates
    - In federal or provincial elections, it also is often wise to limit your invitations to candidates from the leading parties as their candidates often prefer not to appear alongside candidates of "lesser" parties
- Often candidates will not agree to appear unless/until they know who else will be participating. Thus, if you have a major candidate who has not agreed (even if s/he has not explicitly turned you down), you may have problems getting others involved
- It is not unusual to have candidates delay confirming their participation. They prefer to commit to events promising maximum exposure, and they may not see your event that way

<u>Press Involvement</u>

You may wish to bring the media out to your event. The probability of press attendance depends on:

- The quality of information you provide them to entice them
- The presence or absence of other, more important, news stories on the day of the event
- The availability of a staffer to cover your event
- Their overall interest in your event, your organization and the candidates
- The candidates who have agreed to participate

Because of the many factors noted above, there is no guarantee that a press release or an invitation will produce media at your event and you should not count on coverage. Media relations is a completely separate topic, but we have provided some helpful information on it in Appendix B.

It is also important to realize that, by inviting the press, you are giving them license to use their judgment on what to report. This may not be what you would prefer to have reported, but you do not control their content.

Finally, if you invite media, it is a good idea to make this clear to members of the audience, as some may have reservations about being photographed or video- and audio-taped.

<u>Member Engagement</u>

Bringing members (and others) out to a debate or town hall meeting is the other key to success. Some useful guidelines to help ensure this are:

- Communicate with members early and often, using as many different methods as you have at your disposal and your budget can bear: e-mail, posters, flyers, mail, newspaper ads, blogs, Twitter, Facebook, LinkedIn, your website, discussion forums, etc. In a desperate situation, don't neglect a phone committee either
- Be very clear on why the meeting is important. Members will not even consider attending unless they see they have something at stake, and understand exactly what it is. Include this in all your key communications
- Members also need to be aware the meeting is a way to connect with politicians on other issues (try as you might, it is unlikely you will be able to restrict questions to your issues)
- Solicit member questions before the event and, time permitting, ask them as part of the general question period if the member indicates s/he will not attend. Some questions may be appropriate to include as part of the moderator's questions
- Schedule the meeting with consideration for members' time. If your members are primarily business people, a time during the work day may be appropriate. However, if they are consumers, an evening may be a better fit
- Consider providing refreshments. They may be available either before or after the meeting, but some members may appreciate them. If you choose to do this, indicate it in your member communications (it's another reason for requiring pre-registration, too)
- Leverage your contacts to bring members out. As noted, phone committees are a good way of doing this. If a Board member is close to a particular group of members, provide him/her with the necessary material to contact them
- Even if the meeting is in a specific riding or ward, open it to all your members in the area. For a federal or provincial election, each party will have an established platform that will not vary from candidate to candidate. This is not likely the case in a municipal election, which is an argument for holding a debate/town hall only for mayoral candidates

Although this section has talked primarily about members, do not ignore the general public. If you have contact lists of potential members or people who have signed up for your e-newsletter, include them in promoting the event. If you have sufficient budget room, use newspaper ads to reach non-members.

<u>Format</u>

A typical format for such an event consists of:

- Introduction by moderator – include information about the association in case you have non-members or press in attendance
- Opening comments – each candidate may have the option to make a general opening statement if you wish
- Questions from moderator – there are some questions it is important to ask, and these should be posed by the moderator. Don't count on the audience to come up with these questions, and draft them with care. As noted, these should be pre-circulated to the candidates
- Question period – open the meeting up for questions from the audience. Do not allow statements from them, and politely cut off anyone who is making a statement rather than asking a question

- Closing comments – each candidate may have the option to make a general closing statement if you wish

Key People

The following people are crucial to the success of the meeting:

- Moderator – in addition to introductions and asking pre-agreed questions, the moderator should manage the meeting, keep debate civil, limit long-winded questions or statements from the audience, and keep things on time
- Timer – candidates should be told how much time they will have for opening and closing comments and to reply to questions. The timer should enforce these limits and should be equipped with "countdown" cards so the moderator and candidates know how much time the candidates have left
- Reporter – if you are going to write a follow-up article (for your website, publication or blog, for instance), have someone there to record comments, questions and replies. This person does not have to take verbatim transcripts, but should capture the gist of everything said in an unbiased manner. Alternatively, record the meeting and have someone prepare an article from the recording. A recording can also be made available on your website. The article and recording help members see that the association is doing something for them

Important Caveat

To maintain credibility with both members and the politicians, you must be very clear that the association is neutral. Your function is to ask the important questions in a forum designed to acquaint the members with the candidates and bring issues to light. Even if you find a certain candidate's platform agreeable, you should refrain from anything that may give the impression that you support it. This is definitely a case where a few minutes discretion is worth hours of damage control.

Post Meeting

As always with government contacts, thank all candidates by letter for their participation. Providing some summary of the meeting – whether by an article, blog or website posting, or recording made available on your site – is also helpful, as it shows members that the association is doing something to promote their issues. In addition, a public meeting is an "on-the-record" event and easier to report than private meetings with politicians and government officials. It may also be useful to ask participants for comments; you can use positive ones in promotion of your next debate or town hall.

Legislative Committee Appearances

Much of the work of government at all levels is conducted through committees. These are made up of elected officials and supported by paid staff. A major function (although not the only one) of committees is to review and, if necessary, amend legislation (by-laws at the municipal level).

An understanding of the legislative stages may be helpful. At the federal level, these are:

- First Reading – the bill is introduced by its sponsor (a government Minister or a private member) and the House of Commons agrees to its introduction. Little detail is provided at this stage, and its purpose is to permit the bill to be printed and distributed to MPs, and put on the order paper. A motion for First Reading is usually deemed to be adopted automatically, without a vote
- Second Reading – the House of Commons debates the general scope of the bill, to determine whether it should proceed. A bill may be defeated at this debate. If it is not, it is referred to a committee for hearings, a detailed review, and amendment. Your association may be invited to participate in the hearings. When the committee has finished its work, it reports to the House. The report contains the text of the amendments adopted by the committee
    - Report Stage – the bill goes back to the House where it may be further amended, and the final text of the bill is determined. The Report Stage only results in an agreed version of the bill; the bill itself is not approved or disapproved
- Third Reading – the bill is either adopted or rejected by the House of Commons. A bill that receives Third Reading will proceed to the Senate
- Senate – a bill that has passed Third Reading in the House then goes to the Senate, where it follows a process similar to that outlined above. The Senate may further amend the bill; these amendments must be mutually agreed between the House and Senate
- Royal Assent – a bill that is passed by the Senate is then assented to on behalf of the Queen by the Governor General. Upon receiving Royal Assent, the bill becomes law
- Proclamation – the bill itself may contain a date (or in some cases, dates) on which it comes into force (is proclaimed), or the proclamation date may be determined by the Governor in Council (the Governor General acting on the advice of the cabinet)

If a law requires regulations to be drafted, these, too, are generally open to public consultation. A bill will not come into force until the regulations have been adopted; this can sometimes result in a delay of a year or more, in the case of a complex set of regulations or regulations that are judged to have a major impact on those they affect.

The provincial or territorial process is generally similar, although none of them have a Senate, so the Senate stage is omitted. There are some variations on these processes, but all legislation must go through a committee, and most committees will hold public hearings. In addition, as mentioned above, committees will often investigate other matters not directly related to legislation.

Many municipal matters are also dealt with by committees before being discussed and voted on by council.

A committee will usually issue an invitation for briefs (written submissions on matters before the committee and are dealt with in Part 3, above). These are considered by the committee and, at times, the authors (or their organizations) may be invited to appear before the committee. In addition, the committee may ask for an expression of interest on the part of groups or individuals to appear, although submission of such an expression of interest does not guarantee an invitation to appear. At all times, the committee makes the determination of who it will invite to appear.

While there is no guarantee that you will be invited to appear, the following steps may increase your chances:

- Submission of a written brief. As noted, the committee will usually invite these by publication of a notice, but you may also opt to submit a brief on a matter of which you are aware without such notice. Guidelines for submission of briefs are discussed in Part 3, above
- Writing to the Clerk of the committee asking to appear. Include some information on your organization, names and titles of proposed witnesses and preferred dates for an appearance
- Writing a similar letter to the committee Chair and all its members. Contact information for committees of the House of Parliament can be found on-line at http://www.parl.gc.ca/CommitteeBusiness/CommitteeContact.aspx?Language=E&Mode=1&Parl=41&Ses=1 (as a starting point). For Senate Committees, you can start at http://www.parl.gc.ca/ParlBusiness/Senate/Committees/Committee_SenList.asp?Language=E. Each committee has its own home page that includes the information you want. Provincial governments should have similar listings
- Speaking to the committee Chair or members of the committee's steering committee about your request. Don't hesitate to leverage any contacts you may have in this regard
- If one of your proposed witnesses is from a riding served by a committee member, speaking to that member and notifying them of the fact and why there is value in hearing your witness
- General building of credibility over time. If your association is involved in government processes, and particularly if you have appeared before committees before and have established credibility, you are more likely to be invited to appear on a matter within your area of concern or expertise

Committees are subject to the rules of parliamentary procedure; for information on this, see http://www.parl.gc.ca/About/House/compendium/web-content/c_g_parliamentaryprocedure-e.htm. You should be familiar with this topic if you wish to appear.

If you are invited to appear, here is some helpful information:

- Prepare beforehand. Know your material cold and rehearse if possible (see the notes on this under *Pre-Meeting Preparation* in Part 4 of this guide). Since you will, at the outset of your appearance, be making a formal presentation, prepare speaking notes for all witnesses who will participate
- Bring sufficient copies of your presentation for all members of the committee and for its Clerk (note the guidelines on submission of briefs from Part 3; written submissions accompanying a presentation are generally subject to similar guidelines)
- If you plan to support your presentation with audio-visual material (PowerPoint presentations, etc.), you must notify the clerk of the committee ahead of your presentation so an appropriate room can be booked (for federal committees, the recommended lead time is five days)
- Arrive 15-30 minutes early (before the start of the hearing, **not** before the start of your presentation)
- With permission of the clerk of the committee, bring a photographer to take pictures of your witnesses engaged in discussion with committee members.

You may also want to supply these photos to the relevant committee members for use in their publications

- Where available, make use of translation devices; in federal and some provincial committees, you may receive questions in either official language
- Do a quick, last-minute review of your notes to refresh your memory. However, if possible, make your presentation without reading the notes verbatim
- Keep your presentation brief, while still covering your key points. If your organization has already submitted a brief, you can condense matters considerably. Long, repetitive presentations may result in committee members losing interest, are discourteous for other witnesses, and do not allow as much time for questions. Typically, presentations should be limited to three to five minutes
- After all witnesses have completed their presentations, the committee will ask questions
- Don't be afraid to engage in debate if you judge it is warranted. Use your facts at this stage, and do not make assertions that those facts do not support
- Make sure you understand a question before you respond
- If you sense that a committee member has not articulated the reason or underlying meaning of a question, respond both to the question and the reason/meaning without, however, making the member uncomfortable
- Questions from some committee members may sound adversarial without actually being so. Even if the question is adversarial, do not become combative in your response
- If you don't know the answer to a question, admit it and promise to get back to the committee with an answer as soon as possible after the hearing
- You will usually have the opportunity to make a closing presentation of about a minute in length. Use it to capture your key points and/or make a specific request for committee action

The purpose of a committee hearing is not to defeat a bill; rather the committee looks at the bill's contents and what amendments, if any, should be made to it. If you are arguing against an entire piece of legislation, make that argument to all members of the legislative body, not to the committee. In this, Canadian process differs from American; US legislative committees may recommend a bill not be adopted/passed, but this option is not available here.

Post Hearing

It is generally a good idea to remain after the hearing has been adjourned. This makes you available to committee members for follow-up questions and gives you the opportunity to thank members and engage them in conversation regarding the matter at hand. If the media is present (not all hearings are open to the press), staying also gives you an opportunity to respond to media questions. If you are asked any, find out which media outlet the questioner is from so you can look for a story. Remember, however, that being asked a question does not mean that there will be a follow-up story or that your organization will be quoted in any story that *is* done.

Part 6: Media Relations

Often, an association will incorporate media use as part of an advocacy campaign. Arguably, media should actually be part of an overall *communications strategy*, of which advocacy forms a part. If you establish media relations within your communications strategy, you are more likely to build the kinds of relationships that will allow you to capitalize effectively on media in your advocacy efforts.

Understanding Media

In the broadest sense, media provide information (which can include opinions) to their audiences in exchange for some benefit. TV, radio, newspapers and magazine do so as a way of generating advertising revenue and, in some instances (such as print media), subscriptions. Bloggers and other social media communicate news and commentary as a way of building credibility for themselves and/or their organizations.

<u>TV and Radio Newscasts</u>

TV media includes networks, their local affiliates, and independent stations. While some radio stations may be owned by a corporation having broad radio interests (e.g. Rogers), they tend not to function as a network but as independent local stations. Nevertheless, they may have common editorial guidelines; these are worth noting.

To state the obvious, newscasts deal with items that are news – events and personalities of interest to their audiences. Because there is a lot of competition for newscast airtime, they select stories that are compelling to their audiences.

TV network newscasts focus on national or regional issues or issues relevant to a large portion of the network's viewers. Local newscasts, offered by network affiliates and independent stations, focus more on local issues and include sports and weather in their air time (which network news may not). Newscasts are generally twice daily, around supper time and in the late evening. To be interesting to TV news, a story must usually also have a strong visual component. Having such a component to your story increases its chances of being selected by a TV station.

Because most radio stations are local in nature, radio news usually includes items of national, regional *and* local interest. Frequency of newscasts varies by station – some feature news every hour around the clock, while others only have hourly newscasts during morning and evening rush hours. The visual component is unimportant in radio, naturally, so there is more opportunity to have your story included.

Available time on newscasts is limited, and editors must be ruthless in determining what stories they will allow to air. Networks and stations have guidelines to help in this selection.

<u>"All News" Stations</u>

Some TV and radio outlets use the "all news" format. Usually this means they feature news, weather, sports and, sometimes, documentary-type programming all day long.

Canada's national TV news networks are:

- CBC News Network (formerly CBC Newsworld) – national news, weather and sports, with rebroadcasts of CBC documentary programs and its own current affairs (political and financial news) programming
- CTV News Channel (formerly CTV Newsnet) – national news, weather and sports, and rebroadcasts of CTV public affairs programming

Both channels are available on cable or satellite only, and neither has any regional news segments, so your story would once again need to be national in nature.

A few markets have local "all news" radio and TV stations. In addition, Rogers owns a network of local news stations, such as 680 News in Toronto. These stations focus on local news primarily, but also carry national and regional news, along with business, weather and sports. If your story is local or regional in nature, they may be interested.

Public Affairs/Documentary Programming

All three major networks (CBC, CTV and Global) have public affairs and documentary programming. Such shows offer more in-depth analysis of news-related issues than is allowed for in newscasts, and may do general interest or human interest stories as well. While your group may not be the sole focus of a segment on this type of programming, it may be able to participate in one or to spark interest in doing one.

General Interest Magazines

General interest magazines are generally national in scope and are usually news oriented (e.g. Maclean's, Time Canada, etc.). They will, however, report provincial, regional or local stories if the editors judge them to be sufficiently newsworthy. Maclean's is the only Canadian national news magazine; Time, Newsweek, etc. publish Canadian editions but give precedence to US and international stories. These magazines, because they are not dailies, may devote more space to news and issue analysis than a news-paper or the broadcast media.

Specialty Magazines

In this category, we also include industry magazines. Because of their narrower focus on a specific topic area, they are more likely to look at stories that are provincial, regional or local in scope. Most magazines in this category are issued monthly (and some are only quarterly), so they may not be an appropriate outlet if your story has immediacy. Content in such magazines varies from "hints and tips" to human interest to analytical. If you believe such magazines may be useful to you, become familiar with their style and content. In addition to media releases, some may be open to submission of story ideas or written stories (assuming they are not particularly self-promotional). If you are considering submitting a story, ask for a copy of their authors' guidelines.

In this category, don't exclude newsletters or magazines of associations that may be related to yours. They may be more willing to use your story, especially if you have a broader relationship with them.

Newspapers

The Canadian newspaper publishing industry has newspapers at the national, regional and local levels ("national" newspapers are actual national editions of large metropolitan dailies such as the Toronto Star). In larger centres, there are even neighbourhood newspapers. Thus, if your story is of sufficient interest, there is at least one paper that may consider it. Neighbourhood newspapers are usually not daily – they may be published anywhere from one to three times per week.

If you are promoting an event, remember that most newspapers have a "coming events" section which will list it, with varying levels of detail. This is not advertising, and papers do not charge for it.

Larger newspapers often have particular sections that appear once or more per week – "Autos", "Condominium Living", etc. If these fit with your overall message, particularly if you want or need to reach the broader public, these may be good outlets for you. In addition, these newspapers may run special sections on an annual or quarterly basis, for which they will want editorial content. Such sections are usually listed as part of the publishing calendar on the papers' websites, and you may want to consult this. Note that, because these sections are infrequent, they are not appropriate for stories with immediacy.

Media Websites

Virtually all media have websites, and these are not necessarily limited to stories they publish or air. As a result, they may be more open to using your story on the website than they would be to broadcasting or printing it. However, general editorial guidelines will still apply – if the station, magazine or newspaper is strictly national in focus, they will not likely use a story that is local or regional in nature.

Blogs

The internet permits practically everyone to be a reporter or a publisher, and nowhere is this more obvious than with blogs. For relevant blogs, do a Google search on whatever the focus of your association is with the word "blog" appended. You may want to also add the word "Canada" to limit results. If you find one or more that are relevant to you and are independent (i.e. not company focused), you may want to include them as part of your communications strategy.

If there is an issue for which you are advocating, a Google search for that issue with "blog" appended will yield listings; you may want to visit these blogs and, if you find an article of interest, comment on it. When commenting, include your name, title, organization and website address as your signature (be careful not to "spam", though, as the comment will likely be deleted). Look at other comments on that blog for guidelines on this. Comments are not primarily promotional in nature, and should contribute something substantive to the discussion.

Media Relationships

The key to incorporating media successfully into your communications strategy is to develop relationships. If you and your association are unknown to the media, or their only contact with you is an annual media release announcing your new President, that counts against you in getting any of your stories used. However, if you know one or more persons in different media outlets, they may be more open to your association and its story. In addition, they may even initiate contact with you for comment on other stories they are running (this is potentially the best thing that can happen, as it automatically casts you as an expert, giving you added credibility in other areas).

To develop media relationships:

- Identify the media outlets that might be interested in the type of stories you will generate. If the issues you address are complex and require work over a relatively long period of time, documentaries, public affairs programming, specialty magazines and special newspaper sections may offer a more sympathetic forum as they are more likely to discuss issues analytically and in depth. If you tend to have issues that are "news" (short duration, event driven and relevant to immediate policy discussions), newscasts, news magazines and the news sections of newspapers would be a better option
- Identify one or more persons at each outlet. Communicating with a generic e-mail address (e.g. citydesk@tvstation.ca) does not lend itself to building a relationship. Working with a specific individual gives you a personal contact. Ideally, this person would be a decision maker (editor, news director or similar), although reporters may also be useful contacts on specific issues, particularly if they have a subject they normally cover
- Be clear on what you have to offer. This process is similar to the one you use with politicians and public officials. Define your area of expertise and, if appropriate, the issues on which your organization wants to focus
- Develop a "media kit". This is a package of background information on your association and the issues for which it advocates. If you have any sort of relevant demographic member information, include it along with a list of contacts (unless each member of the Board is authorized to speak on behalf of the organization, do not include contact information for them) and a brief history. Your media kit is an opportunity to show you are a credible source, but it is not a solicitation for membership and should not include membership applications, brochures, etc. You are further ahead to abstract relevant content from this material. Where appropriate, provide one or more photographs
- Make contact. Be mindful of your potential target's time constraints – media with daily "publication" schedules tend to be more rushed than those with weekly, monthly or quarterly schedules, so don't expect a long "getting to know you" conversation with an editor at a major metropolitan daily – s/he doesn't have the time
- Cultivate the contact. As with public officials and politicians, if your group does something interesting to your contact's audience, or you become aware of an issue that will be important to them, a quick phone call or e-mail to your media contact, providing the information while not being self-promotional may be both useful and appreciated. However, do not inundate your contact
- If your contact reaches out to you on a story or issue, be prompt in your response. This is particularly true if you are contacted by someone facing a short publication deadline; s/he is unlikely to wait even a few hours for a response. If you have no comment, say so. If your organization has a position on the question, state it clearly. If you have useful background to provide, do so concisely. It may be helpful here to have one or more media contacts to which you can refer the person. If you do refer, it is better

practice to conference your spokesperson into the conversation than to simply give the media person his/her contact information

Words of Warning

Once you have made a comment, issued a press release, held a press conference, etc., the story is no longer in your hands. There is no guarantee it will be used, or that it will be used in the way you would hope. If you make a single controversial statement, it may loom larger in media coverage than you intended, potentially to the detriment of your story, position or issue. Controversy sells, so you should not be surprised if that becomes the focus of resulting articles/items.

If you have been interviewed, whatever you say (and potentially your actual words) may be reported as the interviewer heard it, and you will not generally be given a chance to clarify, retract or modify it before it appears.

Some media outlets have political or other biases, and these may be reflected in their reporting as well as in their editorial content. There is a risk that your comments, story or position will be interpreted in terms of that outlet's bias, and there is nothing you can do about it, even if it results in you being taken out of context.

Part 7: Grassroots Lobbying

If a political decision maker hears from one person, unless s/he represents tens of thousands of members (equal to tens of thousands of voters) or more, the decision maker receives one opinion. If that same decision maker hears from 50 or 500 or 5,000 of your members, however, s/he has received that many opinions, and accords them correspondingly greater weight. That's the theory behind grassroots lobbying – it is much better for your position if you can mobilize a "groundswell" of opinion in support of that position, particularly if you encourage consistency of message.

Grassroots lobbying is effective when an issue requires legislative intervention; staff members, who are not elected, are not likely to be swayed by a grassroots effort – they have nothing at stake.

What makes for a successful grassroots lobbying effort?

- The best contact is personal – between a politician and a resident of his/her riding or ward, to whom s/he is ultimately responsible. Thus, communication should be between the voter and the politician, and the voter should clearly identify him/herself as living in the politician's riding
- The central message must be clearly defined – your members should know exactly what they are advocating and why. If you choose to ask them to relate a personal incident or anecdote relating to the issue (part of making the contact personal), provide them with guidelines to help them stay on message
- The message must be consistent – whether you choose a form letter or ask members to draft their own, be sure that you provide at least a standard paragraph that clearly says what the politician is being asked to do
- E-mail and social media are good, but regular mail is better – if a politician collects a file folder full of physical letters or cards, it has more impact than an inbox full of bits and bytes. Don't count on the politician printing out the e-mails
- Make it easy for members – give them everything they need. If you are asking them to send in a form letter (or form e-mail), be clear this is your request. If you are asking them to draft their own letters or e-mails (either as an alternative to a letter or as the sole method of communication), provide them with guidelines and a framework for the letter. Give them a list of elected representatives and contact information so they can identify the person in their riding or ward, or provide them with a link to a website that permits them to do this. Don't just say "send this to your MP/MPP/MLA/councilor" without providing some way for them to get that person's contact information, as this decreases the likelihood they will follow through
- If appropriate, ask them to copy the Prime Minister/Premier/Mayor on their messages, as this may support your own advocacy efforts. Provide the necessary address
- Ask them to copy your association's office so you know what the member response to the initiative was. Again, provide them with the association's contact information to make this easier
- Budget sufficient funds and staff for the effort. If both are tight and the advocacy project does not have an appropriate amount allocated to it, you risk running out of cash and staff time before you run out of work. At best,

you will have to scramble to find both, taking time away from the project; at worst, you will wind up quitting part way through.
- Establish deadlines for the project, and make sure everyone – members included – is aware of them. If a politician receives 200 messages in a two-day span on your issue, it has much more impact than 500 messages that dribble in over a month
- Communicate about the project with your members, so they know what you are doing and what results you are achieving. This will make your next grassroots request more likely to get responses from them. At a minimum, let them know about the campaign before the campaign materials go out, remind them of the purpose when you send out the materials, and give them an update on results once it is over. Tie the campaign in with the rest of your advocacy efforts too, so members know what the big picture is and what their part of it is (and how they've contributed)

Grassroots advocacy can be a powerful part of your overall advocacy strategy and can also contribute to your association's success:

- Grassroots advocacy gets the members involved, helping to keep the association in their minds
- Grassroots advocacy is part of the benefits of membership, and may therefore help build member allegiance to the association
- Grassroots advocacy, for the two reasons just noted, may help members decide to volunteer for committee work and other association activities
- Grassroots advocacy can help increase awareness of your association with elected officials
- Grassroots advocacy helps support your other advocacy efforts (even when they don't have a grassroots component) because it increases your credibility with elected officials
- To the extent that your grassroots advocacy efforts are successful, they give you another tool to recruit new members

Part 8: Conclusion

We hope you have found the material in this guide useful in your advocacy efforts. If you have any questions or feedback, please contact your lead staff person at the association office, who will be happy to help you.

Introductory Letter to a Government Minister

“Canadian Federation of Independent Truckers”

<Date>

The Honourable John Smith,
Minister of Transport
<Address>

Dear Minister:

Did you know that independent truckers, owning and operating their own vehicles, are responsible for hauling x% of all freight that moves by road in Canada? As the association representing Canadian truck owner-operators, the Canadian Federation of Independent Truckers (CFIT) is well positioned to provide you with insights into their concerns.

I am writing you as President of the Federation, to introduce ourselves to you. Our members form a vital link in ensuring Canadian businesses have the ability to import and export goods at fair rates, and meet the demands of Canadian consumers for those goods, when they want them and at prices they can afford. Given the high proportion of freight we move, both on contract for individual shippers and receivers, and as subcontractors to Canada’s large fleet operators, we are significant contributors to Canada’s economic well-being.

I am also attaching some information on CFIT to this letter, including a recent copy of our newsletter, a profile of our members, and an estimate of our economic impact, to give you a flavour of our industry, our concerns, and our activities. To keep you informed, I have taken the liberty of subscribing you to our newsletter.

I hope that we will be able to work with you and the staff of your Ministry on issues of mutual importance in the future. In the meantime, please feel free to contact me if you have any questions on the Federation.

Sincerely,

Jane Doe,
President

[Note: this letter can be varied for a Deputy Minister, Assistant Deputy Minister or key staff person as needed.]
[Note: if your introductory letter is going to more than one person, send each of them an individualized copy rather than a “cc”, even if all the recipients are in the same Ministry or Department.]

Comment [DP1]: Something interesting or important (or both) about the association

Comment [DP2]: Identify your constituency

Comment [DP3]: Clear statement about what you do and why, from a government perspective, it’s important

Comment [DP4]: Add whatever information you think would be useful

Comment [DP5]: Optional, but useful

Letter to Newly Appointed Minister
"Canadian Federation of Independent Truckers"

<Date>

The Honourable John Smith,
Minister of Transport
<Address>

Dear Minister,

On behalf of the Canadian Federation of Independent Truckers (CFIT), I am pleased to congratulate you on your appointment as Minister of Transport.

Did you know that independent truckers, owning and operating their own vehicles, are responsible for hauling x% of all freight that moves by road in Canada? CFIT represents Canadian truck owner-operators; as such, we are well positioned to provide you with insight into our concerns.

I am writing to introduce CFIT to you. Our members form a vital link in ensuring Canadian businesses have the ability to import and export goods at fair rates, and meet the demands of Canadian consumers for those goods, when they want them and at prices they can afford. Given the high proportion of freight we move, both on contract for individual shippers and receivers, and as subcontractors to Canada's large fleet operators, we are significant contributors to Canada's economic well-being.

I am also attaching some information on the Federation to this letter, including a recent copy of our newsletter, a profile of our members, and an estimate of our economic impact, to give you a flavour of our industry, our concerns, and our activities. To keep you informed, I have taken the liberty of subscribing you to our newsletter.

I hope that we will be able to work with you and the staff of your Ministry on issues of mutual importance in the future. In the meantime, please feel free to contact me if you have any questions on CFIT.

Sincerely,

Jane Doe,
President

[Note: this letter can be varied for a Deputy Minister, Assistant Deputy Minister or key staff person as needed.]

Comment [DP6]: Interesting or important (or both) fact about the association

Comment [DP7]: Your constituency

Comment [DP8]: A clear statement of what you do and why, from a government perspective, it's imkportant

Comment [DP9]: Add any information you think would be useful

Comment [DP10]: Optional

Issue-related Letter to Minister (Reactive to General Policy Statement)
"Canadian Federation of Independent Truckers"

<Date>

The Honourable John Smith,
Minister of Finance
<Address>

Dear Minister,

As President of the Canadian Federation of Independent Truckers (CFIT), which represents Canadian truck owner-operators, I have had occasion in the past to keep you updated on our activities. I am taking this opportunity today to write you on an issue of concern to our members. We noted, in the recent budget, that the government is planning a higher tax on diesel fuel, to bring prices more in line with those paid by consumers on regular gasoline. From our members' perspective, this means that our operating costs will increase in an environment when our profit margins are already being squeezed.

While we appreciate that this shift in tax policy is intended to provide an incentive for trucking operators to move from diesel to more environmentally friendly fuels – a long term policy objective which we applaud – there are no such alternatives presently available at an economically sustainable price. As a result, our members have a choice between passing this increase in operating costs on to our customers, or absorbing it. Both of these are difficult to implement in today's economy.

- Much of our members' business is conducted under contract with large fleet operators, and the terms of those contracts make an increase in freight rates problematic to pass on
- Margins in our business are already shrinking due to economic conditions, so a further increase in operating costs will, according to a study commissioned by CFIT (attached), cause approximately y% of Canadian owner-operators to close their doors. As self-employed individuals, they are not eligible for employment insurance, so the resulting economic dislocation will be significant for them
- Even if we were able to pass this increase to our customers, it means an indirect tax on virtually all Canadians
- The problem can be better solved by a joint research effort by the government, our industry, shippers, and truck manufacturers to research viable alternatives to diesel fuel

I have attached to this letter a more detailed discussion of these issues along with our suggestions as to how they might be addressed. As representatives of our industry, we would be pleased to work with the government to further a solution to this economic and environmental issue.

Please contact me, or have an appropriate member of your staff do so, if you have any questions on our position.

Sincerely,

Jane Doe
President

[Note: as you draft this letter, keep the tone generally positive and welcoming of the government's interest in the matter.]

[Note: in attached documents, include anecdotal and statistical information supporting the association's position. If the document is long (greater than 5 pages), include a brief executive summary.]

Comment [DP11]: Remind them of who you are and what your constituency is

Comment [DP12]: Identify the source of the concern

Comment [DP13]: State the government action that causes concern

Comment [DP14]: State the members' perspective on the issue

Comment [DP15]: Give them credit for their intention

Comment [DP16]: State the basic reason, in government terms relating to their intent, they are "wrong"

Comment [DP17]: Provide fuller information on why this is a problem for you and how you propose to counter it

Comment [DP18]: Show helpful intent

Detailed Letter in Response to a Government Consultative Paper
"Canadian Federation of Independent Truckers"

[Note: when the government or a government agency proposes to revise legislation, regulations or policy, it will often issue a discussion document; this generally (but not always) includes a list of questions to which a response is invited. You may take the initiative to respond, or decide to respond as a result of an invitation to do so. Papers normally provide information on the person to whom the reply should be addressed. This person may not be familiar with your association, so some introductory information is useful. This is a combination letter/response.]

<Date>

Mr. John Smith, MP
Chair, Parliamentary Committee on the Environment
<Address>

RE: DISCUSSION PAPER ON TRUCKING EMISSION REGULATIONS

Dear Mr. Smith,

The Canadian Federation of Independent Truckers (CFIT) consists of Canadian truck owner-operators; our purpose is to represent the interests of our industry to government, shippers and large fleet operators, and to assist our members in the successful management of their businesses. Independent truckers are responsible for hauling x% of all freight that moves by road in Canada; our work indirectly touches almost every single citizen of this company and we form a vital economic link between producers of goods and their consumers.

CFIT is pleased to respond to your discussion paper, *Emission Standards and Sustainable Operation of Road Transport in Canada*.

1. **What factors should the government consider in enacting new emissions regulations?**

The road transport industry in Canada forms part of a continent wide transportation system, operating in a variety of regulatory regimes – federal, provincial and state. Each level of government sets out its own standards for the industry, meaning that it cannot be approached as if it were homogenous. We believe that new emissions regulations, which will have a beneficial effect on the environment, must not be taken by the federal government in isolation.

Recommendation: We recommend that the federal government include other regulators in Canada and the United States in considering new standards, and initiate discussions with these other governments towards harmonizing regulations in this area.

<Repeat as needed for additional questions.>

CFIT appreciates the opportunity to participate in the consultative process relating to emission standards for our industry. Overall, we believe this important objective can best be implemented over a period of time, and in consultation with other regulators. We look forward to presenting our position in person and responding to any concerns you and your committee may have.

Respectfully submitted
Canadian Federation of Independent Truckers

Jane Doe, President William Owens, Executive Director

Comment [DP19]: Who you are, what your constituency is, what you do

Comment [DP20]: Why you are important

Comment [DP21]: The "real bottom line" as to why government should listen to you

Comment [DP22]: In this format, you would work through the paper question by question

Comment [DP23]: A discussion of the issue from a factual perspective

Comment [DP24]: What you suggest government does to deal with the issue posed by this question

Comment [DP25]: Usually, there is more than one question

Comment [DP26]: Identify your interest in participating

Comment [DP27]: A summary of your "bottom line" argument on the entire paper

Comment [DP28]: If you will make a presentation to a Committee or Subcommittee

Comment [DP29]: Signatures of people who prepared the document and who may be involved in future discussions

Cover Letter for Detailed Response to Government Consultative Paper "Canadian Federation of Independent Truckers"

[Note: when the response to a government consultative paper exceeds 5-7 pages in length, it may be better to submit it as a separate report with a covering letter.>

<Date>

Mr. John Smith, MP
Chair, Parliamentary Committee on the Environment
<Address>

Dear Mr. Smith,

RE: DISCUSSION PAPER ON TRUCKING EMISSION REGULATIONS

The Canadian Federation of Independent Truckers (CFIT) consists of Canadian truck owner-operators; our purpose is to represent the interests of our industry to government, shippers and large fleet operators, and to assist our members in the successful management of their businesses. Independent truckers are responsible for hauling x% of all freight that moves by road in Canada; our work indirectly touches almost every single citizen of this company and we form a vital economic link between producers of goods and their consumers.

CFIT is pleased to respond to your discussion paper, *Emission Standards and Sustainable Operation of Road Transport in Canada* in the attached document.

We appreciate the opportunity to participate in this consultative process. Overall, we believe this important objective can best be implemented over a period of time, and in consultation with other regulators. We look forward to presenting our position in person and responding to any concerns you and your committee may have.

Respectfully submitted
Canadian Federation of Independent Truckers

Jane Doe, President William Owens, Executive Director

Att: Executive Summary
Detailed Response to Discussion Paper Questions
Study of Economic Impact of Independent Truckers in Canada

Comment [DP30]: Who you are, what your constituency is, and what you do

Comment [DP31]: Why you are important

Comment [DP32]: The real "bottom line" as to why government should listen to you

Comment [DP33]: In this format, you are responding in a separate document. This is also useful if the paper doesn't pose any questions and you are responding to key issues as you see them

Comment [DP34]: A summary of your "bottom line" argument on the entire paper

Comment [DP35]: If you will make a presentation to a Committee or Subcommittee

Comment [DP36]: Signatures of people who prepared the document and who may be involved in future discussions

Proactive Letter to Government

[Note: this letter assumes you have sent information previously to the recipient. If not, you can adjust it so it includes material on the association.]

<Date>

The Honourable James Williams
Minister of the Environment
<Address>

Dear Minister,

As you may have noted in the material I have been sending you on behalf of the Canadian Federation of Independent Truckers (CFIT), we are active and have concerns in a number of areas that are affected by federal government policy. One such issue is environmental sustainability in the road transportation industry in Canada, and it is in connection with this that I am writing today.

Our membership, in a recent survey, has identified this concern, and have asked me to present a possible course of action to you. Essentially, the issue is how best to balance improvement in Canada's environment with economically feasible measures in an industry that affects both producers and consumers of goods.

Almost all trucking operators in Canada use diesel fuel, and it accounts for x% of all greenhouse gas (GHG) emissions in Canada. As a country, we are committed to meeting certain GHG emission targets under the Kyoto Protocol, and road transportation certainly offers an opportunity in this area. However, it must be done in a fashion that respects and reflects the concerns of Canadian and American regulators, and Canadian consumers, shippers, truck manufacturers and truck operators.

In the attached document, we are proposing a consultative process that brings these stakeholders together to develop a roadmap that enables our country to meet its targets in an economically viable manner. Our proposal includes:

- Harmonization of environmental regulation of trucking in both Canada and the United States
- Identification of the current state of alternative fuel technologies for trucks
- Future development of such technologies through a research program funded jointly by all stakeholders
- Consideration of the economic impacts of a shift in fuel technology
- A plan, with annual goals, that will permit us to meet our Kyoto Protocol targets for GHG emissions

We would like an opportunity to meet with you and senior officials in your Department to discuss this admittedly ambitious program; I will be contacting your shortly to arrange this.

Sincerely,

Jane Doe
President

Comment [DP37]: Remind them you have already been in touch; if you haven't, use an introductory paragraph similar to the previous letter

Comment [DP38]: The issue about which you are being proactive

Comment [DP39]: If you have member support, cite it. You may also want to include a summary of relevant parts of the survey (or whatever) in your attachments

Comment [DP40]: Reconcile the government point of view with the association's

Comment [DP41]: A fuller statement of the problem you are setting out to solve

Comment [DP42]: What you see as criteria for a successful solution

Comment [DP43]: Let them know there is more to this than just a letter, and briefly state what it is

Comment [DP44]: Provide a summary of the key elements of your proposed solution

Comment [DP45]: Identify the next step(s)

Comment [DP46]: Show you are being proactive in moving things along

Appendix 2 – Media Releases

The following tips are far from exhaustive, and are intended as guidelines only. Resources are available on the internet and through local libraries on this topic.

Do your Homework

Before sending out media releases, identify those most likely to be interested. If you are in doubt, get a copy of the rate card or advertisers' information package; this will give you some data on the individual medium's audience. Consider also the frequency of publication and appropriate lead times. Finally, read, watch or listen to the media so you have some idea of stories they are likely to use. A review of their websites is helpful here; some things that do not make it on the air or to the printed page will still appear on a website. Finally, consider bloggers, as these may be more local (if your event or issue is local) and may also use the release.

Once you have selected your media, you will want to identify:

- The department most likely to be receptive (e.g. politics (federal, provincial or municipal), community, etc.). As a last resort only, send it to the city desk
- The name, telephone number and e-mail address of a person to whom you can send your release (jane.smith@somemedia.com is better than pr@somemedia.com, because you can follow up with her)
- Any particular slant that seems appropriate for a given medium. Ideally, a media release is a one-size-fits-all proposition, but there may be times where you decide to vary this

Relationship

Just as with governmental officials, having a relationship with media in your area is helpful in getting a release used, so you may want to devote some organizational resources to identifying and building such a relationship with important media outlets.

The Release

A media release is a news article, and should be written accordingly, even if its purpose is to inform the media about an upcoming event in the hope they will attend. The components of a media release are:

Dateline: The dateline actually has nothing to do with the date; it is, instead, the location of the event or the organization (e.g. "Toronto, Ontario" or just "Toronto").

For Release: This is the release date, and is usually "Immediate". Unless you are an organization with a reason and the clout to embargo a news story or delay its release (and most of us are not), you should *only* issues items for immediate release. An additional factor is that, unless you are well-known, a release dated for some future time may get lost.

Headline: The headline is a short sentence or phrase that indicates the content of the release and why it is worth anyone's time to read it. In today's environment, there is a lot of competition for people's time, and the headline is the first thing they will scan to determine whether they read the article. Craft this so it grabs attention without overstating your case, and don't assume a reader will read the *entire* headline. "Transport Minister to Speak on Affordable Biodiesel" is better than "Independent Trucking Group to Host

Transport Minister"; many people scanning the page will see "Independent Trucking Group" as the first words in the headline and lose interest, where "Transport Minister" appearing first is an easily-identifiable and more likely to at least get them to read the rest of the headline. In addition, lead with the person or group taking the noteworthy action – in this case, it's the Minister who is speaking rather than the group that is hosting. The first headline also indicates what the Minister's topic will be, thus allowing the reader to decide whether to read further; the second headline does not do this. As noted, don't overpromise – "Transport Minister to Make Major Biodiesel Policy Announcement" is only appropriate if you know this to be a fact.

Content: The "scanning" rule mentioned in conjunction with headlines applies here too. If you notice the way many news articles are written, each subsequent paragraph provides more detailed information about the topic, so that a reader can scan the first paragraph and decide whether to read the rest of the article. Each paragraph s/he reads develops the story further.

Straight text is dull to read, so use quotations if you can. These liven the story and help readers put a "face" to it. It is usually safe to quote members of your association, even to the extent of putting words in their mouths, but you should clear the quotes with them before you circulate your release. Do not quote others (in our example, the Transport Minister) unless you have a direct quote from them and permission to use it. The quotation may come from a letter, and need not be something that s/he says verbally. If you are quoting from different people (also a good idea), be sure to ascribe the quotes to the proper person and to make it clear who said what.

While it is true that many readers will not read to the end of the article, you should still put information about your association in the last paragraph, as it is the least "news worthy" item in the story.

For Information: If your release is of interest, some media outlets will want a contact person at the association. Provide that person's name, position/title, telephone number (including extension, if applicable) and e-mail address.

Distribution

We recommend sending the release out to specific people at specific organizations as your primary distribution method. You may also want to use an organization such as Marketwire for distribution (to sign up for an account, go to http://www.marketwire.com/Signin/register) as a second line of approach. Typically, such organizations will allow you to specify distribution, but you will need to create an account (which is free) and will, of course, pay based on the distribution you choose and the length of your release. Marketwire and similar organizations allow you to upload your press releases, but may strip out any formatting.

Sample Press Release

"Canadian Federation of Independent Truckers"

Dateline: Toronto, Ontario

For Release: Immediate

TRANSPORT MINISTER TO SPEAK ON AFFORDABLE BIODIESEL

Federal Transport Minister John Smith will address the Canadian Federation of Independent Truckers (CFIT) on affordable biodiesel fuel at the CFIT conference next Monday.

"Biodiesel is an important way for trucking to minimize its impact on the environment," says CFIT President Jane Doe. "Fuel is a major cost component for our members, and making something both ecologically friendly and affordable benefits all Canadians by allowing us to keep freight rates down while keeping Canada green," Doe says.

According to the Department of Transportation website, biodiesel is an alternative fuel available to many truck operators across the country. "The unfortunate problem is that, while it's more available than ever before, it costs more to produce and is subject to the same taxes as regular diesel," Doe says. "This makes it an expensive option for our members, who carry x% of Canadian road freight."

The Minister has been meeting with CFIT officials to discuss the issue over the past year, but to date the parties have been unable to come up with a formula to address the affordability issue. While Monday's meeting is not expected to offer a solution, it will allow the broader CFIT membership to hold a dialogue with the Minister.

"Since our last meeting with the Minister, the economic situation has gotten tighter, and we hope that hearing from our members will help him understand the full dimensions of the issue we face," Doe says.

The CFIT conference theme for this year is "Keep on Trucking: Canada's Independent Truckers Look to the Future". According to Doe, this is an ideal venue to continue the dialogue with the Ministry.

CFIT is the only national organization representing independent truckers, and has some 10,000 members across Canada. Independent truckers are an important part of the Canadian economy, connecting manufacturers with distributors, retailers and end-users. The conference will explore current and developing technologies designed to enable truckers to be more effective. It brings CFIT members together with industry stakeholders.

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For further information:

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