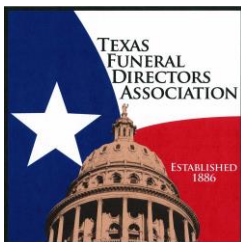


Texas Funeral Directors Association  
Legislative Contact Teams

2019

# Contact Team Leader Toolkit



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## How to Build a Successful Legislative Contact Team

Every Legislative Contact Leader (LCL) experience is unique – levels of advocacy experience, knowledge of the public affairs world, and personal connections to lawmakers all vary to a large degree. As a result, it is important to develop a Legislative Contact Team (LCT) to support you in executing your significant grassroots activities and duties to the best of your abilities. The following guidelines will help you build a new team or help if you are struggling with your current support structure.

### Step 1: Identify Your Needs

Take inventory of your needs as an LCL and build your team accordingly. When choosing members of your LCT, keep in mind that ideal TFDA advocates hold the following attributes:

- An understanding of the key issues affecting the funeral service profession;
- An interest in politics;
- A willingness to play an active role in specified TFDA grassroots initiatives;
- Existing relationships with legislators, community and business leaders.

Many TFDA advocates may have more specialized experience. Areas of advanced familiarity might include:

- Relevant issue expertise and/or a history of advocacy;
- Campaign experience;
- Leadership experience within TFDA.

### Step 2: Ensure Strong Team Qualities

Your goal in building an LCT is to help you better carry out your duties and increase political participation. As a result, ideally your team should include:

- A minimum of one LCT member for each State Representative or Senator;
- TFDA members you know will be reliable and responsive;
- TFDA members who are locally civically engaged;
- Those who serve on TFDA Legislative Committee and/or invest in TFDA PAC;
- Also, consider asking members with different professional specialties (i.e., embalmers, transporters, etc.)

### Step 3: Seek Advice

There are significant resources available to every LCL to help them recruit and build a high potential LCT. Consulting with the following groups will help you identify and recruit individuals who are interested and capable advocates on behalf of TFDA. They include:

- Chapter leadership
- TFDA leadership
- TFDA Executive Director, Harvey Hilderbran and PAC Director Rob Leatherwood

### Step 4: Hold an Organizational Meeting

Once chosen, it is important that you meet with your team and learn their interests, advocacy history and strengths. This will help you seamlessly work together to maximize the team resources in order to play a fundamental role in TFDA's grassroots public affairs agenda. The organizational meeting may be in person, by conference call, or tied to an already scheduled meeting (i.e. TFDA Convention) to take advantage of team members being in one place.

During this meeting, LCLs should gather information to establish regular contact patterns with team members, which can also be activated when hot issues emerge or other needs arise. Below are some examples of information that you may want to gather:

- Phone number;
- Primary email address;
- Home/work address;
- Fax number.

**Once your LCT is established, TFDA will create a secure digital space for you and your team to communicate and collaborate.**

### Step 5: Get on the Same Page

Your team members should all be equally familiar with the members of the Texas Legislature. Since legislators have different committee expertise or issue areas that are of interest to them, communications directed at legislators should reflect the TFDA advocate's familiarity with an issue and his/her understanding of its importance to the particular member of the Legislature.

Provide your team with a biography of your lawmaker. Other materials can be provided to you by TFDA.

### Step 6: Ensure Participation

Some LCT Members will be more involved than others depending on the time they can dedicate. To help ensure maximum participation, we suggest the following:

- Ask your team members about their level of time commitment
  - This will help you identify which members are willing to do what activities.
- Delegate!
  - Giving Team Members greater responsibility for certain projects often helps generate a feeling of ownership over the goals of grassroots and eventually your team's overall success.

### Step 7: Provide Recognition and Positive Feedback

Team members who go above the call of duty or who have made great strides in furthering the team's goals should be acknowledged and appreciated in newsletters, email updates or in other forums. If the team has been successful (i.e., getting your member of the Legislature to be a co-sponsor or getting a vote), the team should celebrate its victory. Please notify TFDA staff if you have a particularly victorious win.

## Sample LCT Recruitment Letter

[Date]

Dear [Insert LCT Contact]:

I am writing today to see if you would be interested in joining my team. Over the next **two years**, I will be serving as the Legislative Contact Leader (LCL) for [Insert your Representative/ Senator] during the 87<sup>th</sup> Texas Legislature on behalf of the Texas Funeral Directors Association (TFDA). In this capacity, I will work closely with [insert member of Representative/ Senator] and [his/her] staff to ensure that [he/she] has a good understanding of the issues before the Legislature that impact the funeral service industry. But I cannot do it alone. I need your help.

LCLs are the face and voice of the funeral service profession for lawmakers in Austin and are essential to TFDA's continued success and growing influence at the Texas Legislature. It is important to me that [insert your Representative/ Senator] grasp the full picture of the funeral service profession and the breadth of what we represent. That's why I need you. Your experience as a (funeral director, embalmer, etc.) is invaluable and will help me better do my job as LCL. Together we will paint a clear picture of the issues affecting our industry and the families in [insert your district].

As an extension of the grassroots voice, my LCT will help organize and implement advocacy efforts to help me further build a strong relationship with our legislator. You will be especially crucial in bolstering each Call for Action. Please let me know if you would be willing to serve at my side over these next **two years**. I would be honored to have you as my team member.

Sincerely, [Name] LCL for [Representative/ Senator]

LCL Team Submission Form

District	LCL Member	Team Member First Name	Team Member Last Name	Email	Expertise Added

## Legislative Contact Team Responsibilities

- Respond to all TFDA Calls For Action
- Motivate others in your network to respond to TFDA Calls For Action
- Advocate on behalf of TFDA
- Assist your LCL with any in-person meetings in the district or in Austin
- Help your LCL to develop any materials requested by legislative offices or staff
- Be a resource for your LCL on any issues they may not be as familiar with
- Help organize events for the legislator while in the district

## TFDA Staff Contacts

Executive Director – Harvey Hilderbran [harvey@tfda.com](mailto:harvey@tfda.com)

Director of Marketing & Communication – Mary Yanes [mary@tfda.com](mailto:mary@tfda.com)

Membership/PAC Director – Rob Leatherwood [rob@tfda.com](mailto:rob@tfda.com)



## Introduction to the TFDA Legislative Activity Digital Sign-on (TLADS)

Log on to \_\_\_\_\_

The TFDA Legislative Activity Digital Sign-on is at the heart of all TFDA grassroots efforts. This web-based, two-way political communication system was created to make contact with state legislators as easy, efficient, and especially as effective as possible. All LCLs utilize the TFDA website to access resources and carry out a majority of their advocacy activity. If you ever have any questions about the TFDA Legislative Activity Digital Sign-on, please contact Rob Leatherwood, Membership/PAC Director, at 512-442-2304 or [rob@tfda.com](mailto:rob@tfda.com).

### Calls For Action

- A Call For Action will periodically come to the email associated with your membership.
- The CFA will prompt you to send an email to your legislative member right from the email message.
- Responding to a CFA is quick and easy, and is a **required activity for all Legislative Contact Leaders**.
- All LCT members are also encouraged to answer every CFA.

### Field Reporting

- The Field Reporting tool allows TFDA to track and recognize all the hard work you do building a relationship with your legislator.
- More info.....

# Do's and Don'ts: Meeting with Members of the Texas Legislature

## Do

### Before the Meeting

- Prepare by reading up on your Legislator on his/her website.
- Learn your Legislators' committee assignments, where his/her specialties lie, as well as his/her personal interests.
- Plan your strategy ahead of time. Decide who will lead the meeting if multiple TFDA members are attending and which talking points each person will cover.
- Choose talking points. Create a list of 3 to 5 important issues you want to cover and use real examples to communicate your point.
- Organize by making sure you know where the meeting is taking place and at what time. Arrive on time, be polite and well dressed.
- Touch base with TFDA Staff before the meeting for insight on the Legislator's position of the issue.

### During the meeting

- Be sensitive to the amount of time allotted to you. Ask up front and if you get 15-20 minutes with your Legislator (or staff) that's great!
- Present your business card up front.
- Present the need for what you're asking your Legislator to do. Use data or cases you know.
- Relate situations in his/her home district.
- Ask the Representative's or Senator's position and why.
- Show openness to and knowledge of counterarguments and respond to them cordially.
- Admit what you don't know. Offer to try and find out the answer and send information back to the office.
- Spend more time with Legislators who may not have embraced the TFDA position on an issue. You can lessen the intensity of the opposition and perhaps change it.

### End of the Meeting

- Get the name and business card of any staff person who sits in on the meeting. This will help you should you need to follow up after the meeting.
- Give the legislator and staff any handouts you have on your talking points.
- Thank the office for any support the legislator has given on our issues.

### After the Meeting

- Write a thank you email to the staff with whom you met and offer to be of any assistance on funeral service issues in the future.
- Follow through on any promises you made to the legislator or staff.
- **FILE A FIELD REPORT.**

## Don't

- Don't fail to show up for your scheduled meeting. Call if you are running late or plans change.
- Don't discount legislative staff. Many legislative staffers look (and are) young. However, do not assume that such a staffer does not have significant responsibility and the ear of his or her legislator. In many offices, the staffer you are meeting with will prepare a summary memo for the legislator that carries extreme influence and power.
- Don't overload a Legislative visit with too many issues.
- Don't confront, threaten, pressure or beg.
- Don't be argumentative. Speak with calmness and commitment so as not to put him/her on the defensive.
- Don't overstate the case. Legislators are very busy and you are apt to lose their attention if you are too wordy.
- Don't expect Legislators to be specialists. Their schedules and workloads tend to make them generalists.
- Don't be put off by smokescreens or long-winded answers. Bring the legislator back to the point. Maintain control of the meeting.
- Don't make promises you can't deliver.
- Don't be afraid to take a stand on the issues.
- Don't shy away from meetings with legislators with known views opposite your own. Those meetings are opportunities to educate and change minds.
- Don't be afraid to say, "I don't know." Offer to follow up with them after the meeting when you can obtain the correct information.
- When meeting in Austin, don't be offended if you are asked to meet in a hallway or conference room. The Capitol is a busy place with limited space. Where you meet does not matter, but what is said and how you conduct yourself does.

## Do's and Don'ts: Delivering TFDA PAC Checks

TFDA PAC serves as a critical LCL resource to support funeral service champions in their election efforts. The following is a reminder of the importance of delivering your TFDA PAC checks and the rules surrounding that activity. ***Do not put yourself at risk or embarrass the lawmaker or his/her staff by forgetting these important guidelines. The difference between correct or incorrect is a LEGAL DISTINCTION.***

### Do

- Deliver your TFDA PAC check in-person.
- Meet your legislator at a non-government location like a coffee shop, your office, or their campaign headquarters. **NEVER** deliver a check at his/her office or on any other government property.
- Deliver the TFDA PAC check with 15 days of receiving it from TFDA.
- Contact TFDA if you cannot deliver the check to the candidate, so another TFDA representative may be appointed to deliver it.
- Praise the legislator for his/her work in the district and for supportive actions he or she has already taken to further funeral service issues.
- It is important to only comment on action they have taken **IN THE PAST** and not on any legislation currently being considered.
  - Even better is to avoid discussing specific legislation at all while presenting a check.
- Keep close track of all TFDA PAC checks. If for some reason the check is lost, please report it to TFDA Staff **IMMEDIATELY** so that it can be canceled and re-cut.

### Don't

- **NEVER** deliver a TFDA PAC check in a government office OR on government property. It is **ILLEGAL!** This includes everything from state office buildings to state parks or any other state facilities.
- Note: Even presenting the check in the parking lot can still be considered government property and may be unlawful. **DO NOT DO IT.**
- Never make any political "ask" of your legislator while presenting your TFDA PAC check.
  - For example, DO NOT say "Please vote for this bill." Again, it is ILLEGAL to solicit a legislative vote in exchange for a contribution.
- Don't delay delivering your TFDA PAC check. If the check is not cashed within 60 days, the check will be voided and you will need to request a replacement check from TFDA.
- Don't deliver a TFDA PAC check after the election-day (primary or general) for which the check is designated. After Election Day, TFDA may no longer contribute to a candidate and we miss the opportunity to demonstrate our support.
- Don't mail a check unless it is absolutely unavoidable. Please deliver all checks in-person if possible.