2025

Advocacy Guide

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This Advocacy Guide is a **free resource** for those who are interested in engaging with Parliamentarians and Public Service employees, to share their stories and help advance common goals. This guide is primarily intended for sector stakeholders that are new to government relations, or either have few or no dedicated resources within their organization.

This Guide was prepared by Co-operatives and Mutuals Canada (CMC). Although it focuses on the Federal scene, the information herein can mostly be applied to provincial and territorial activities.

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The 5 "W"s

WHO?

Everyone can participate in government relations activities, regardless of if they are a staff, board member, or allied professional. You do not need to be a lobbyist, hire government relations consultants or to be the senior leader to participate in the advocacy process. Storytelling is crucial to public awareness and sharing one's story is something that can be crafted as key speaking points.

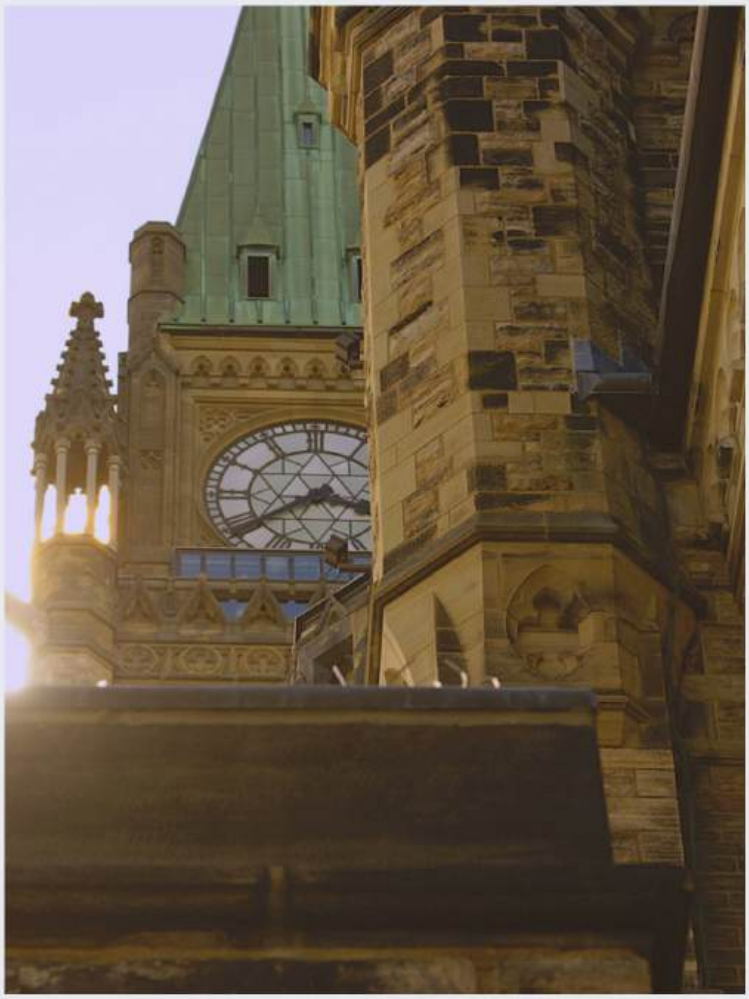
WHAT?

Advocacy can take various forms, but at its core, it involves a process or actions that are intended to support a cause, proposal or position. There are a broad range of activities associated to this, from high-level awareness activities to direct engagement on an issue or opportunity. Government relations is a long-term relationship building—focused endeavour that requires patience, diligence, repetition, positive engagement and seizing opportunities.

The range of potential involvement is very broad. It can vary from simply making sure to introduce yourself as a co-operative representative at a community event, to being involved in defining and implementing strategies for the benefit of the whole sector.

In addition, individuals are also invited to share their insight into connections that Parliamentarians and senior government officials have in relation to the co-operative sector in order to inform the big picture.

It is recommended that individuals and organizations mention all politically related interactions with the associations and federations that represent them.



WHEN?

Parliamentarians, their teams and public employees are active year-round on weekdays, with expected periods of limited accessibility during the holidays and peak summer vacation time. Many politicians will also be active on the weekends in their ridings, where community and other events take place. Members of Parliament (MPs) are usually in Ottawa three weeks a month, with the exception for July and August as well as mid-December to the end of January.

Although announcements can and do happen year-round, opportunities to provide input through formal channels such as pre-budget briefs, consultations or appearances as witnesses, are most common in the months leading up to the Fall Economic Statements (November) and the Federal Budget (Early March).

WHERE?

When in Ottawa, meetings will usually take place in Parliamentarians' offices located in the Parliamentary Precinct, the area immediately surrounding the Parliament Building. It should be noted that numerous Government offices are also located just across the Ottawa River in Gatineau, West of Parliament Hill at Tunney's Pasture and in other locations in the National Capital Region.

When in the ridings, the meetings will usually take place in or near the Constituency Office. It should be noted that some ridings are immense and have multiple offices. Therefore, it is important to confirm at which location your meeting will take place.

The fact that virtual meetings are now common increases opportunities to conduct successful engagement activities at significant cost and time savings. However, occasions to engage in person should be sought out and seized.

WHY?

The importance of advocacy cannot be understated. It is how individuals and organizations voice their concerns, ideas and suggestions to inform policies, laws, programs and regulations which directly affect the establishment, growth and resilience of co-operatives and mutuals across the country.

"It's not who you know, it is who knows you."

—Old Adage

Expectations Related to Government Relations Engagement

To create an effective government relations strategy, those involved directly or de facto through a leadership position in the sector should:

01

Familiarize themselves with the current issues and flag other needs.

02

Discuss internally what you, as an organization, are ready and willing to do in relation to the engagement of politicians and statements with political or activist messages. Failure to do so might result in crossed wires and missed opportunities. This is especially important to do prior to election periods.

03

Prepare and disseminate key speaking points about your own co-operative or mutual and avoid speaking about topics that do not involve yourself or your co-operative or mutual. This includes creating an "elevator pitch."

04

Engage and meet with Parliamentarians to raise awareness about your co-operative or mutual, as well as the co-operative movement at large. This will help set the stage for future conversations and involvement on issues and opportunities, through referrals and/or follow-up.

05

Report on all connections or meetings with any Federal Government officials, Parliamentarians, representative bodies or advisory groups to CMC and your sectoral associations.

Parliamentary Lexicon

Member of Parliament (MP)

A Member of Parliament (MP) is a federally elected official who represents a riding or constituency in Canada and sits in the House of Commons. They can be elected as a Member of the Government, the Official Opposition, Opposition, Member of Parliament without a recognized party or an Independent. There are presently 343 ridings to reflect population shifts, communities of interest or identity, historical patterns and geographic size in sparsely populated regions.

Unlike Ministers, Parliamentary Secretaries and MPs do not control funding envelopes. In addition, they have strict ethics rules regarding their conduct and notably, the exertion of influence in relation to government grants and the implementation of programs, as well as the acceptance of gifts and invitations.

Ministry (Cabinet)

The Prime Minister (PM) is the leader of the majority party and once appointed, the PM selects a number of confidential advisors from among the members of the governing party (Government MPs), who are made members of the Privy Council and sworn in as ministers. Collectively, they are known as the "Ministry" or Cabinet. The Cabinet is the key decision-making forum in the federal government, responsible for its administration and the establishment of its policy. (Source)

Ministers

Ministers are each given a Mandate Letter from the PM upon appointment and responsible for a Department, agency or portfolio. These Mandate Letters outline the objectives that each minister will work to accomplish, as well as any pressing challenges they will address in their role.

Ministers, like MPs, can provide letters of support, if it is on their MP letterhead and for programs that are not within their Ministry. They are also prohibited from using their position to seek to influence the outcome of any process, including a favourable decision or priority listing for their own constituents or those of a cabinet colleague.

Minister of State

The term "Junior Minister" or Minister of State (MoS) is less frequently used and refers to a full-fledged member of the Cabinet, who leads a specific component within a larger department.

Parliamentary Secretary

A Parliamentary Secretary (PS) reports to a Minister and is given responsibilities by the Minister's Office. Parliamentary Secretaries are not members of the Ministry and therefore do not play a formal role in the Cabinet decision-making process, however, they remain very influential individuals to engage with.

Opposition MPs

The Official Opposition has the second-largest number of elected MPs. Their leader is the Leader of the Opposition. The other parties who have at least 12 members in the House of Commons are a "recognized party" for the purposes of Parliamentary Proceedings. It is possible to serve as a MP in a Party that is not officially recognized or, they can sit as an Independent Member.

Shadow Cabinet

Shadow Cabinet is composed of members of the Official Opposition. Each member holds a critic role for each of the party's specific policy area, often mirroring the current Cabinet. They are typically the ones who hold the Government accountable for items related to that portfolio.

Critics

Critics can be found in each Opposition Party and their roles are similar to the Shadow Ministers previously mentioned. However, only the Official Opposition can have an actual Shadow Cabinet.

Backbenchers

Backbenchers is a term used for all other elected parliamentarians that do not hold an appointment as a Minister, Parliamentary Secretary or Opposition Critic. Backbenchers are not to be overlooked as they do sit, and sometimes even chair Committees as well as regional or provincial caucuses. They have input into decisions made by Ministers.

Caucus

A Caucus brings together individuals that either share a political party affiliation (Parliamentary Caucus), region or interest. Many of the special-interest caucuses are non-partisan with representatives of many parties, and aim to foster collaboration, increase knowledge and advance a common agenda.

"If you don't pay attention while they are in the opposition, they won't pay attention to you while in office."

—Anonymous

Question Period (QP)

Question Period (QP) is a daily opportunity for the Opposition Parties to ask questions to the Government. It is no secret that the primary goal of Question Period, especially in the last couple of decades, is to influence what gets reported in the media. Therefore, it is common to hear questions and answers based on pre-scripted soundbite attempts.

Committees

Committees are a body made up of Members of Parliament, Senators (or both in the case of Joint Committees), selected to consider any issue referred to them. The list of House of Commons Committees and schedules can be found here, and those of the Senate here. Transcripts, reports and other resources can be found online and used to identify key issues and allies. Committees often request the appearance of stakeholders as part of their activities. However, individuals or organizations can also proactively request to appear before a committee.

Fact: *The Riding of Abitibi—Baie-James—Nunavik—Eeyou is the largest in Canada and covers an area of 731,401 km², more than half of Quebec's landmass.*

The Senate of Canada

The Senate of Canada is comprised of 105 appointed (unelected) members serve as a "House of Sober Second Thought". It examines legislation that has passed in the House of Commons before it becomes law, ensuring that Parliament acts in the best interest of the Canadians. It can also introduce legislation in the Senate, study issues and examine government spending proposals. Senators are accomplished Canadians who can influence change based on their roles and experience.

Staffers

Staffers is a term used to describe Parliamentarians staff, either on Parliament Hill or back in the Riding. Staffers are the gatekeepers of their MP or Senator's time—and so it is crucial to develop a good working relationship with them.

Constituency Office Staff

Constituency Office Staff is responsible for the logistics and support of the activities related to the MPs' business while in their Riding. They are often the main point of contact for local individuals, business and civil society organizations that require assistance, guidance or want to engage with the Member of Parliament on a matter.

Parliamentary Staff

Parliamentary Staff supports the MP's work related to their House of Commons duties when in Ottawa. This can include coordinating stakeholder engagement, their House of Commons schedule, research and many other miscellaneous tasks.

Ministerial Staff

Ministerial Staff provides advice and support to a Minister. The smooth and efficient operation of a Minister's Office is under the auspices of their Chief of Staff, who is responsible for solving problems, making decisions, coordinating staff and more. Policy Directors and Advisors focus on specific files and are responsible for providing recommendations and reports based on engagement with subject-matter experts and other stakeholders. These individuals will usually be the main points of contact for stakeholders and are critical to a well-functioning Parliament.

Public Servants/Civil Servants/Bureaucrats

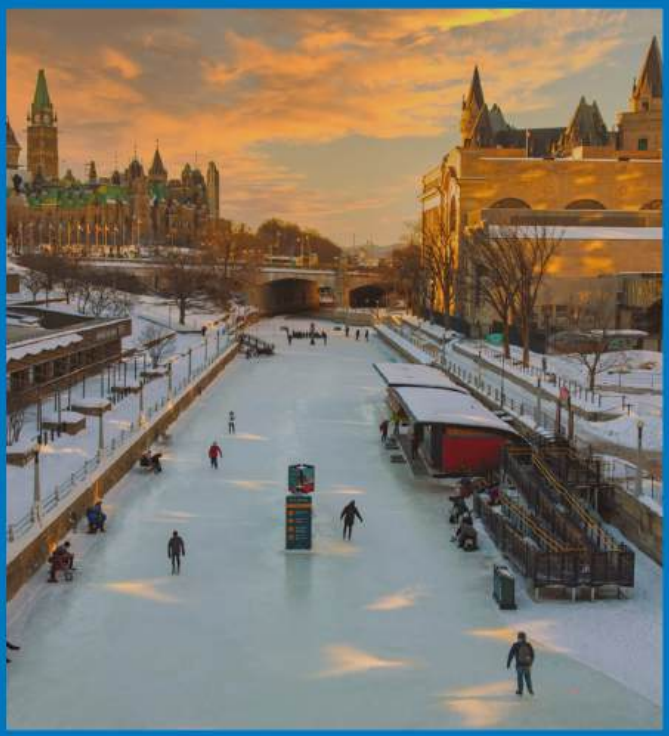
These terms generally refer to government employees who work in a department or agency and do not work in the political side of their department. Senior level public servants, such as Deputy Ministers (DM), Associate Deputy Ministers (ADM) or Senior Advisors are appointed.

The importance of establishing and maintaining a working relationship and trust with relevant points of contact in the Public Service is vital. They are the ones responsible for the design, delivery and oversight of programs and strategies, and ensure the day-to-day operations within their department or agency. They provide essential services to the public and advice to policymakers. They are also non-partisan and provide the institutional memory within departments and agencies, allowing for continued operations following changes in the political realities.

Tools and Resources for Advocacy Work

Decorum Guide

The Government of Canada provides a guide to the styles of address which outlines the appropriate way to use formal and honorific titles to address individuals in a respectful way, in writing, in conversation and when referencing the person with third parties or in public. It is strongly recommended to follow these guidelines until you are instructed otherwise.



Lobby Registry

Free and open access to the Government is an important matter of public interest. As such, any meeting with a Parliamentarian or someone from their office is subject to Lobbying Acts. Moreover, if more than 20% of your time as an employee is spent on duties related to government relations/advocacy, you need the register as a lobbyist. Interactions with other types of Designated Public Office Holders, including senior public servants such Deputy Ministers, Associate Deputy Ministers and Assistant Deputy Ministers (or occupies a position of comparative rank) and appointees must also be reported. To learn more or to see how to report any meetings, we encourage you to visit the Office of the Commissioner of Lobbying of Canada's website.

Government Electronic Directory Services (GEDS)

The GEDS database is an online portal that allows you to search for government employees name, keyword, departments and so on. It is always recommended to follow instructions provided in government program information guidebooks or news releases for information requests. However, this directory can be a great tool to help advance and connect with stakeholders in a targeted way and understand the hierarchy within departments. It is strongly recommended to do outreach on a case-by-case and targeted basis based on position, as opposed to copying many employees in an initial outreach email.

Hansard (The Debates)

The Debates (Hansard) are transcriptions of what was said in the House of Commons and are part of the House Publications. As part of the official records, quotes and comments from these documents can be used to identify quotes from allies and detractors.

Parliamentary Sitting Calendar

The House of Commons Sitting Calendar can be consulted to determine if the elected officials are in Ottawa or in their Ridings on a certain date. The Senate of Canada also has a similar calendar which can be helpful when scheduling meetings with Senators.

Meetings With Parliamentarians: Best Practices

Pre-Meeting

Do your homework. Review the person's background and understand their responsibilities so the meeting can be focused appropriately. Often times, you will not have a lot of time with them, so make sure to make the most of it. The majority of what you need is available on the Government of Canada website or on the Parliamentarians' website, constituency page or even their social media. It is helpful to find points in common as well as learning about their current priorities in order to see how they align with yours.

Book the meeting by contacting the office with a clearly articulated request and outline, so it can be given its due attention as part of the scheduling review. If it is a follow-up to another meeting, a request from the MP themselves, a reply to a query from them or a referral from another MP or staffer, do make mention of it. Sending concise background information along with the request is beneficial.

The best time to do the outreach is during the business hours and by email, to ensure a digital paper trail and accurate details. It is important to remember that the staff in Ottawa are in the Eastern Time Zone and those in the ridings will work according to the local time.

If you do not get a reply within a week, other than an automatic acknowledgement, do not hesitate to follow up. This subsequent communication, by email or by phone, should make a reference to the time and date of the first correspondence. Be persistent but stay professional. It is important to stay patient, flexible and understanding. It can take time to get an appointment, which may very well end up being moved at the last minute.

Stakeholders usually prefer meeting the Minister or the Parliamentarian, but that is not always be possible. Instead, do not hesitate to accept a meeting with a staff member, such as a Director of Policy or a Policy Advisor. This initial meeting should open the door for future meetings and is also an opportunity to build a working relationship with the staffers. After all, these are the people who are responsible for briefing the Parliamentarians, making recommendations and contacting select stakeholders as needs and issues arise.

When it comes to MPs, they strongly prefer meeting with their Constituents than with Lobbyists in Ottawa. Therefore, if someone in your team is from their Riding, it is highly suggested to have them attend the meeting with you as it will liken the chances of them accepting a meeting.

Prepare a proposed agenda and share it once the meeting is confirmed. Do not forget to include concise briefing documents, even if they are the same as what you may have previously shared. This will consolidate information for the staffers and allow the people that you are meeting with to prepare their own questions and comments.

Remember that people must be able to make the connection between your ask and their duties and responsibilities. Parliamentarians and their staff will usually focus and pay more attention to your requests if they can understand how:

1. It is relevant for their own constituents and the communities in their ridings.
2. It can be linked to their parliamentary duties, such as providing data, arguments or new information related to committees that they are involved with.
3. How it is connected to a topic they have an affinity for, usually linked to a personal matter, interests or experiences that predates their political involvement. This information is not usually found on government sources, but can be gleaned from their own website, or from conversations with individuals who have an existing relationship with them.

Set objectives for the meeting, notably the key points that you want to make or actions items that you would like to see happen. If you are participating in the meeting with other internal stakeholders or partners, make sure that everyone agrees on the general outline of the objectives, who is to lead which point and/or provide answers to questions that are likely to come up.

Confirm the meeting with their staff few days before, including the names and titles of all participants. Due to time constraints, it is not recommended to have more than three

people attending, and those participating should all have a purpose for being there.

Arrive early. When your meeting is in Ottawa, it is important to arrive at the Parliament building and get through security at least 15 minutes before your meeting begins. Parliament Hill security is similar to what you would go through at an airport. The queue can vary significantly based on the day of the week and other activities occurring around that time.

During The Meeting

Answer these basic questions:

1. Who are you (and/or your co-operative/association/organization)?
2. Why are you here?
3. What do you want?
4. How can they help you?
5. How can you help them or their constituents?

Be flexible as parliamentary schedules are somewhat fluid and things can quickly change if an issue arises, or a vote is called. Meetings can be much shorter than expected, rarely longer, and you can unexpectedly be asked to "walk-and-talk" between buildings, and this is why an "elevator pitch" of highlights is crucial. Most meetings with elected officials will last no more than 20–30 minutes, especially in Ottawa. For this reason, you should not speak in more than 2-minute increments, before offering the opportunity to respond or ask questions.

Be situationally aware. Parliament Hill, the constituency office or community event settings all have advantages and drawbacks, but each is an opportunity to make a positive impression.

Be mindful that Parliamentarians are people that are under tremendous pressure and time constraints, spend a lot of time away from home and operate in a very polarized environment. You will likely come in prepared with a deep familiarity with the points you are intending to discuss, whereas the MP may only have had a quick briefing right before meeting with you and that you might be the tenth stakeholder meeting of that day.

Avoid providing too many details, industry jargon and slide decks, as you will risk losing the attention of those you wish to engage. Do not read from a script either and use your own words when speaking. It is strongly recommended that the well-thought-out meeting plan (see above) be written down as short bullet point. These should be limited to a few key points that you want to make, stories you should mention and a few key facts. With the whirlwind of meetings, issues, requests and activities, you will have a few minutes at best to get their attention, and then you must hold it.

Be memorable for the right reasons. Parliamentarians are no strangers to debate, however, is it usually conducted in a professional manner and with mutual respect for diverging opinions. People who are too forceful or ill prepared are not usually invited to contribute beyond the initial meeting. You

should endeavour to be seen as a well-informed resource that positively contributed to advancing the conversation or identifying solutions.

Have a discussion, ideally by having the Parliamentarian or staffer talk first. This approach will allow you to get a better sense of their knowledge on the subject, any ongoing issues, their desired outcomes, and tailor your speaking points accordingly. The meeting must be focused on succinct conversation points and dialogue.

Be honest. It is much better to admit that you do not have the specific answer to a question than it is to fib your way out. Simply promise that you will investigate it afterwards and it will be an opportunity for you to reconnect.

Snap a picture. Politicians, especially in this age of social media, like to be seen as engaging with stakeholders. Before you leave, request a photo with the MP and permission to share it. A bookshelf, flag or memorable item are good to include as backdrops or props to move away from the posed handshake picture. Make sure that you correctly spell the name of the person and riding before you post. Moreover, often times MPs and their staff will ask for a copy of the picture and the names of the meeting attendees for their own social media accounts. Send them that information as soon as the meeting is done in order for them to post about it in a timely manner.

After the Meeting

Send a thank you note. Emails should be sent immediately after the meeting and make it easier to both attach reference documents and outline agreed-upon next steps. You should also include offer to meet again, answer any further questions that they may have, or to act as a referral point to other experts.

Deliver on the promised follow-up items and inform them of any expected delays. It should be noted that parliamentary email addresses can receive hundreds of emails daily, and yours can be overlooked in the flurry of activities that defines political work. If you send an email and have not heard back, don't hesitate to call or follow up to ensure they received it.

Stay connected and do not hesitate to send important updates if you have new, relevant information, so they have the most recent facts on hand. It is also encouraged to use social media for positive purposes, tagging them in your relevant and posts, and reposting and commenting on theirs when relevant.

Parliamentarians meet a significant number of people as part of their duties, and you should not assume that they will remember you. It is therefore recommended to always re-introduce yourself and your organization, and mention where you would have met before. Through repeated interactions, you will achieve a level of recognition that can help you secure future meetings and become a "go-to" resource.

Engagement Outside of Meetings

By virtue of their mandate and aspirations, politicians usually relish the opportunity to be seen and to speak to stakeholders. Community events are great opportunities to engage with politicians in a more informal context. It is an opportunity for relationship building and visibility, and you should aim to get a verbal interest commitment for a formal meeting. It is important to not make the mistake of forcefully cornering an MP to speak about an issue at a community event. They may be there in an official speaking capacity, wish to spend time connecting with multiple community stakeholders, engaging voting constituents, or might simply be trying to spend precious time with their family. If you do encounter an MP at an event, it is best to introduce yourself and your organization briefly, mention that you would love to meet with them to discuss important matters relating to your sector and that you are happy to contact their office to schedule a meeting should they be interested. After a short interaction, thank them for their time and mention that you understand that they likely wish to meet many others at the event.

Although it is possible and acceptable to try and catch the ear of a Parliamentarian if you come across them in public, be cognizant of your surroundings— always be professional and respect boundaries.

Meetings With Members of the Public Service

When meeting with members of the Public Service, the same rules and respect applies to them. The notable exception is that they operate in a much more grounded and operational context.

With approximately 280,000 employees involved in Core Public Administration and another roughly 65,000 involved in Government Agencies, you may often times find yourself repeating the same message to government stakeholders who work in related portfolios, but who do not know each other. As such, it is always a best practice to properly validate who should be made aware of an issue and which government department is ultimately accountable to oversee the successful implementation of the program, policy or initiative.

If you are informed that responsibility lies elsewhere, you should not hesitate to ask for introductions to colleagues or counterparts in other departments.

Creating an Elevator Pitch

An elevator pitch is a way to explain your goals and objectives in 30 seconds or less. The format of an elevator pitch is simple: you must introduce yourself and get 2–3 key points across in a simple, yet efficient and memorable manner. Think of it as answering the following questions—"who are you and what do you do?"

It is recommended to create your pitch by using your organization, associations or co-operative's own words, goals and reasons for your cause. An elevator pitch can be tailored to the audience, but the core should remain consistent throughout. And don't forget—practice makes perfect! Practice your pitch within your organization or even friends and family who will be able to provide honest feedback.

10 Things to Remember

01

Be proactive, seize opportunities and find ways to engage.

02

Be patient and understanding when trying to secure meetings.

03

Be well prepared.

04

Give examples through storytelling, preferably with a local connection.

05

Respect people and their time.

10 Things to Remember (cont'd)

06

Don't underestimate the roles and influence of staffers and public servants.

07

Stay connected and provide relevant updates.

08

Have a good elevator pitch.

09

Become a trusted resource.

10

Keep like-minded organizations and individuals in the loop.

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CMC is the national member-driven association that represents all sizes and types of co-operatives and mutuals from all sectors. CMC unites, engages, and leads the co-operative and mutualist movement by building bridges, breaking barriers, and advancing its priorities nationally through government advocacy and public promotion, as well as internationally through the International Cooperative Alliance and the International Cooperative and Mutual Insurance Federation.

As a part of its purpose, CMC regularly advocates for the co-operative and mutual sector at the federal level to ensure the ecosystem's voice is being heard. Furthermore, CMC monitors federal government activities, funding announcements and emerging issues. It also regularly meets with Members of Parliament, Senators, political staff, departmental officials, and other public policy leaders to discuss sector priorities and to raise awareness on opportunities and concerns. CMC also works with its Members and partners to keep them informed and engaged.

To learn more about ongoing issues, please visit CMC's website to get up-to-date information on the current priorities and identify those that are relevant or of interest to you.

CMC's Government Relations are focused on pan-Canadian co-operative and mutual specific issues and policies. However, it does endeavour to support and/or assist members, sector stakeholders and partners on issues and opportunities of common interest.

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