The Arc of Massachusetts’
LEGISLATIVE ADVOCACY
GUIDE
Dear Friend,

Thank you for joining us in learning more about the legislative process. It is our intent to share with you the importance of connecting with your own legislator so that the needs and values of people with disabilities and their families are represented on Beacon Hill. Our efforts in this area are through the auspices of the Daniel, Angela & Michael Becker Center for Advocacy.

The decisions made by the Massachusetts legislature directly affect the availability of services and supports. Everything from access to quality in programs as varied as Personal Care Attendants (PCAs), Family Support, Early Intervention and Residential Programs. They also affect the future of the individuals we represent - where people can expect to live, to work and to choose with whom one shares one’s life.

The priorities of legislators who make these decisions are directly affected by phone calls, letters and visits legislators receive from their constituents. Legislators will not vote with us if persons with disabilities and their families are not alerting their own ---legislators to the need for more funding for services. Your activism is the foundation for success.

Democracy is all about the folks at home, the people who vote for individual legislators, the people who elect them to the State House. The more the disability community is aware of this and feels comfortable with the political process, the more successful we will be in expanding services as well as preventing cuts during these difficult times.

We hope you see that participating in legislative advocacy is simply the beginning of a long journey in political activism. We hope you can become leaders in your own local Arc’s governmental affairs efforts. The times are not getting any easier. If we are not bold and fight as hard as we can, we are not doing justice to ourselves and our family member. Thank you for joining us in this journey.

Tracy Atkinson
President

Leo V. Sarkissian
Executive Director
The Ten Informal Rules of Lobbying or
Everything You Always Wanted to Know About Lobbying but Never Thought to Ask

1. **Consider yourself an information source.** Legislators have limited time, staff, and interest on any one issue. They can’t be as informed as they might like on all the issues – or the ones that concern you. You can fill the information gap with your first-hand knowledge. Share your personal connection to the issue- Your Story is Your Power!

2. **Tell the truth.** There is no faster way to lose your credibility than to give false or misleading information to a legislator.

3. **Know who else is on your side.** It is helpful for a legislator to know what other groups, individuals, state agencies and/or legislators are working with you on an issue.

4. **Know the opposition.** Anticipate who the opposition will be – organized or individual. Tell the legislator what their arguments are likely to be and provide them with answers and rebuttals to those arguments.

5. **Make the legislator aware of any personal connection you may have.** No matter how insignificant you may feel it is, if you have friends, relatives, and/or colleagues in common, LET THEM KNOW. Our legislative process is very informal and though it may make no difference in your effectiveness, it may make the difference.

6. **Don’t be afraid to admit you don’t know something.** If the legislator wants information you don’t have, or asks something you don’t know, tell them and then offer to get the information they are looking for.

7. **Be specific about what you are asking for.** If you want a vote, information, support for legislation or an amendment, answers to a question – whatever it is – make sure you ask directly and get an answer.

8. **Follow up.** It is very important to find out if your legislator did what he/she said they would. It is very important that you then thank them if they did, or ask them for an explanation as to why they did not vote as they said they would, etc…

9. **Don’t “burn any bridges.”** It is very easy to get emotional over issues you feel strongly about. That’s fine, but be sure that no matter what happens you leave your dealings on good enough terms that you can go back to them. Remember, your strongest opposition on one issue may be your strongest ally on the next.

10. **REMEMBER YOU ARE THE BOSS!** Your tax money pays the legislators’ salaries, pays for the paper they write on, the phone they call you on. You are the employer and they are the employee. You should be courteous, but don’t be intimidated. They are responsible to you and nine times out of ten, legislators are grateful for your input.
The Budget Process
Timing is Everything

No one has time to waste. In order to be an effective advocate, it is important to know the legislative cycle and how and when to impact the process. The budget is the most important bill to move through the Legislature each year. Understanding the budget process can enable advocates to impact the decisions. The Massachusetts budget runs on a fiscal year cycle that begins July 1 in one year and ends June 30 of the next year. The following time plan is useful for advocates planning their legislative calendars.

SEPTEMBER TO DECEMBER

WHERE IS THE BUDGET?

The Administration begins the budget creation process. Each agency and department submits a budget to its executive office. For example, the Department of Developmental Services, Massachusetts Rehabilitation Commission and Massachusetts Commission for the Blind identify their priorities and submit their budget for the next fiscal year to the Executive Office of Health and Human Services (EOHHS). Then all the Executive Offices, e.g., Health and Human Services, Consumer Affairs, Elder Affairs, submit their budgets to the Executive Office of Administration and Finance, which prepares the Administration’s (Governor’s) version of the total state budget. Sometime during this period the Administration holds open budget hearings, and takes public testimonies.

What your organization should be doing.

Meet with the commissioners of your respective agencies to request that your priority issues become the priorities of the respective Commissioners and the Secretary of Health and Human Services. Prepare position papers and provide resources to support your issues. Begin to meet with those legislators who have been consistently supportive of your issues to share with them the priority
issues of your agency. Also, attend budget hearings, and if possible arrange to testify.

**What you should be doing.**

This is a good time for families to send letters to the Commissioners, the Secretary of Health and Human Services and the Governor’s office. Describe the needs of your family. For example, if you need after-school care to keep your family member home, tell them this. If you need a ramp, a tutor or a residential program, explain that too. Personal letters are a very effective weapon in the advocacy arsenal.

In the Legislature – Families, Arc chapters and other agencies take on the critical role of laying the grassroots constituency groundwork with Senators and Representatives. Get to know your legislators – Senator and Representative! Meet with them, call them and write them. Tell them what your needs are, that you are going to need their help when the budget comes before the Legislature. Also, visit those legislators you don’t know very well. Visits can be set up either in the State House or in your hometown at scheduled Office Hours or by request – ask them to meet over a cup of coffee. (You may have fewer distractions meeting locally rather than in the State House.) It is always important to cultivate new legislative supporters. It is only human nature that legislators are the most responsive to people they know. Get to know them before you ask for millions of budget dollars.

**JANUARY TO MARCH**

WHERE IS THE BUDGET?

According to the Constitution of the Commonwealth of Massachusetts, the Governor must present a proposed budget for the next fiscal year to the legislature by the third Wednesday of January. Copies of the Governor’s budget, known as House 1 (House II this year), are available to the public in the State House (Document Room 428).

The Governor’s proposed budget goes first to the House Ways and Means Committee for review and consideration. The Legislature does not have to agree with the amounts of any of the line items in House 1 or II, and in fact, the House and Senate will likely propose their own versions, often using House 1 as a baseline. But it is always helpful if your priority issue is already in the Governor’s budget. The Senate and House Ways and Means Committees will
schedule joint public hearings and take testimonies from groups and individuals prior to releasing a budget document to the full House.

**What your organization should be doing.**

Move into full campaign mode. Attend public budget hearings and if possible, arrange to testify. Contact legislators; initially concentrate on House Ways and Means members, but by mid-February move on to the full House of Representatives. Reach out to the Chairs and Vice Chairs of the Committee associated with the line item – such as the Committee on Children and Families and Persons with Disabilities or the Public Health or Education Committees. (There may also be a caucus associated with your budgetary item – there is a Special Education/Disabilities Caucus where you would find members of the legislature who share your interest.) It is helpful to do analysis of the budget comparing last year’s line items to this year’s, as well as identifying trends, initiatives and priorities of the administration. Most advocacy groups then concentrate on increasing the amounts in each line item according to the identified budget priorities. But you can also work to strike language that is deemed harmful to your population. If possible, organize weekly visits to the State House to advocate your priorities. It is important to provide fact sheets and other supporting documents to legislators and their staff. Legislative staff play a pivotal role in providing information to their boss, so invest the time in getting acquainted and informing them of your issues and concerns if the legislator is not available when you call or visit.

**What you should be doing.**

This is a critical time to contact your legislators. Call them, write letters, email them and meet with them in their district offices or at the State House. Again, tell them about your family and what your needs are. Most legislators have little or no knowledge of your particular issue. If the only constituents they hear from are those families who want to keep their family members in a large institution, this is how they will vote. THEY MUST HEAR FROM YOU. Sharing your personal story and how their actions can assist you is critical – Your Story is Your Power!
Any story you can get in the local paper about you, your family and your unmet needs can help a great deal. If you plan to visit the State House (including if you are testifying), tell your local paper and ask them to shadow your visit.

**APRIL TO JUNE**

WHERE IS THE BUDGET?

The Wednesday prior to April school vacation the House Ways and Means Committee releases its version of the proposed state budget to the full House of Representatives for deliberation and debate. During this time the House can, and often does, amend the House budget. During the House Budget process, the Senate Ways and Means Committee hold private meetings with senators on their priorities and draft their version of the budget while the House is working on its version. (The Senate has the right to put together its own budget; it does not have to agree with either the House or Administration versions.) In May, the Senate Ways and Means Committee prepares its version of the budget and releases it to the full Senate. As in the House, the Senate can amend, strike, or add sections prior to passing the budget. We, as advocates, can be involved in requesting that our legislators either file, co-sponsor and vote on amendments to change spending allocations in line items, or to add or strike policy recommendations in outside sections of the budget.

Generally, the House and Senate pass differing versions of the budget. A six-member Conference Committee (made up of the House and Senate Ways and Means chairs and vice chairs, and a senior minority member of each chamber) convenes in late May or early June to resolve differences and draft a compromise budget proposal. Advocacy takes place prior to the conference committee (final) version of the budget to push for whichever House or Senate funding or policy versions is better.

The Committee releases the compromise budget for a full vote in late June. The House and Senate vote; upon enactment, the budget is sent to the Governor for his signature. The budget is usually finished by late June to ideally allow the Governor 10 days to review prior to the July 1st new fiscal year.
What your organization should be doing.
Work directly with your legislators and their staff to influence policy. Provide fact sheets and other supporting documents. Meet with as many legislators and staff as possible to advocate your priorities. Continue to organize weekly visits and urge as many people as possible to join you. Attend budget meetings and, if possible, arrange to testify.

What you should do.
Call, write and visit your own senator and representative to make your case. It is very important that you keep contacting your legislators. Reach out to family and friends to insist they do the same. The more people legislators hear from, the harder it is for them to say no.

JULY TO AUGUST

WHERE IS THE BUDGET?
After the Governor receives the enacted budget, he has ten working days to sign it into law. (This period often extends into early July.) He can veto line items and/or strike language and dollar amounts. The Legislature can override the Governor’s vetoes. However, the Speaker of the House of Representatives and the President of the Senate must agree to take up each veto for an override vote. Overrides require a two-thirds vote of both the House and Senate and need to happen during a formal (voting) session. Formal sessions end on December 31st during the first year of the legislative cycle but on July 31st during the second year.

What your organization should do.
If you want the Governor to veto certain items, write to the Governor requesting those line items or language you want vetoed. Alert organization members if there are issues or language that is harmful to the persons you represent and ask them to call the Governor’s office and urge vetoes on those items. If you want the House and Senate to override a veto, call and meet with individual legislators, as well as with the offices of the House Speaker and Senate President.
What you should do.
If you receive an alert that there is language in the budget that would be harmful, make individual constituent calls to the Governor’s office. These calls can impact the likelihood that the Governor will veto an item. If you want the House and Senate to override a veto, make individual calls to legislators, as well as to the office of the House Speaker and Senate President.

Good Luck with your advocacy efforts!
TIPS FOR CALLING YOUR LEGISLATOR

WHEN TO CALL:

Usually from late January (when the budget numbers are submitted by the Governor to the House) through August (when the budget process is complete). Also anytime a Bill is going to be voted on.

HOW TO CALL:

TRY TO SPEAK DIRECTLY WITH YOUR LEGISLATOR OR ASK TO SPEAK WITH A LEGISLATIVE AIDE. You can contact your legislator at his/her State House office. Call the Massachusetts Legislature’s main number (617) 722-2000 if you don’t know your Representative’s or Senator’s direct phone number. If you are unable to speak to either your legislator and/or aide, always leave a specific message with your name, number, where you are from, why you are calling, and ask to be called back.

WHAT TO SAY:

1. IDENTIFY WHO YOU ARE, WHERE YOU ARE CALLING FROM, AND IN WHAT CAPACITY (i.e., as a constituent, agency Executive Director, board member, teacher, parent – or a combination thereof!). Be sure to identify if you are part of a larger network of people in the district – and/or throughout the state (e.g., “Arc affiliate”, etc.) And don’t forget to give your name, address, email and phone number at the beginning or end of the conversation.

2. STATE WHAT YOU ARE CALLING ABOUT (i.e., the specific bill, budget item or issue). When possible, know as much about the bill title, where it is in the legislative process and what action is pending (i.e., “currently in the Education Committee,” “coming up for a vote on the floor of the House today,” or “will be voted on next week”). Although it is not necessary and often not needed, it may help to orient your legislator and/or aide to that particular bill and whether action is a clear priority.

3. STATE WHAT YOU WANT. Request that a legislator take a specific action (e.g., “move a bill out of committee,” or, “or support a budget line item” or “vote for or against a bill”). Be sure to thank your legislator if he/she is a sponsor or co-sponsor of the bill you are calling about – but still ask them to take a specific action!
4. **TELL THEM WHY YOU WANT IT** – Speak from your own experience, beliefs, and convictions! Use a compelling statistic to bolster your case. Share a “real life” story about how this issue will or has affected you or others and state how this proposal could either help or hurt. The more personal you can be, the more impact you will have. If you can, make your case from a “local” point of view and present as specific a picture as possible of how your issue affects people in your legislator’s district.

5. **ASK ABOUT HIS/HER STAND OR OPINION ON THE ISSUE.**

6. **THANK THEM FOR THEIR TIME AND EXPRESS YOUR APPRECIATION IF THEY ARE SUPPORTING YOUR ISSUE!** If your legislator’s position does not agree with yours or if they are undecided, you may want to politely inquire about their concerns – but always ask if there is any additional information you could provide them. If the decision will affect an organization or group that you belong to or work with, you may want to invite your legislator for a visit. This is often an opportunity to create a more powerful impact, as “seeing is believing.” After the visit, be sure to thank them and ask them to let you know when they expect to make their decision on how they will vote.

7. **FINALLY, TRY TO KEEP THE PHONE CALL SHORT AND COURTEOUS!**
   -- Unless, of course, they’re keeping you on the phone with questions.

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**TIPS FOR E-MAILING YOUR LEGISLATOR**

- Many people ask us about the effect of e-mailing your legislator. More and more it is becoming commonplace, but you may ask the legislator’s aide what is his/her opinion of how effective e-mail is.
- Certainly more legislators are using e-mail and are comfortable with it as an effective tool for communicating with constituents.
- In general, follow the same guidelines outlined above for writing your legislator.
- Never use a “form email” that is not personalized to the recipient and from you- state your personal situation and how the proposed change will affect your family.
TIPS FOR WRITING YOUR LEGISLATOR

1. **INCLUDE YOUR NAME, ADDRESS, PHONE NUMBER AND E-MAIL ON YOUR LETTER.** Put your home or business contact information (depending upon the capacity in which you are advocating) directly on your letter. Remember, envelopes can be thrown away! When writing to your own legislator, be sure to identify yourself as a constituent!

2. **INCLUDE THE TITLE OF THE BILL, BILL NUMBER, OR BUDGET LINE ITEM NUMBER AND WHERE IT IS IN THE PROCESS** – e.g., “in the Human Services Committee” or “coming up for a vote on the floor of the Senate next week.”

3. **STATE YOUR REASON FOR WRITING AND BE CLEAR ABOUT WHAT IT IS YOU WANT.** Request a specific action or ask your legislator to commit to a particular position – e.g., “report a bill out of a committee favorable,” “support or oppose a bill or line item,” or “vote in favor of a bill on the House floor.”

4. **STATE WHERE YOU STAND ON THE ISSUE** – State your position of support or opposition clearly. Give a brief statement about what effect the proposal will have on you, the population about which you are concerned, or that legislator’s district. Include compelling statistics, if available. Give a short paragraph about yourself, what your situation is.

5. **OFFER TO PROVIDE ADDITIONAL INFORMATION IF NECESSARY, AND THANK THEM FOR CONSIDERING YOUR VIEWS.**

6. **INCLUDE A PICTURE OF YOUR FAMILY.**
Dear Representative/Senator (Name of Legislator),

I am a constituent of yours and live on _____________________ (give your street address – Legislators love to hear from their own constituents.

I am asking for your support of an act to require national criminal background checks (Sponsor: Rep. Martin Walsh). This bill will require a national criminal background check of candidates who apply for positions to work with individuals with developmental disabilities.

{Insert a paragraph about your situation. Tell them briefly about your disability or your family member and how it affects your day to day life. Give as much information or as little information as you wish.}

I hope I can count on you for your support.

Sincerely,

Your Signature

Your Name
Address
City, State, Zip Code
Phone, E-mail
TIPS ON MEETING WITH YOUR LEGISLATOR

WHY DO IT?
- To “put a face with the name/organization” or issue for your representative.
- To show how seriously you care about the matter you are there to discuss.
- To begin to develop a real relationship with your own legislator.

(NOTE: if your legislator is not available, it is JUST as effective and important to meet with his/her staff.)

WHERE TO MEET:
You can make an appointment to meet with your legislator at his/her State House office, or you can inquire if your legislator holds regular “constituent office hours” in his/her district. You can also request that they meet you outside of office hours – for coffee at a local restaurant.

WHO SHOULD GO?
- Constituents! (people who live in your legislator’s district).
- People who work in your legislator’s district.
- People who are directly affected by the issue or who care about and understand the issue.
- Influential “players” who are allied to your cause.

WHAT SHOULD YOU SAY?
- Thank them for making time to meet with you and be sure to acknowledge if your legislator has been supportive in the past.
- Who you are and/or who you represent – always introduce yourself (even if you’ve met him/her before!) and be sure to introduce the others with you by name, title, and affiliation.
- State your case. Make your points in an organized way. Try to boil the issue down to its essentials – and be clear about what you are asking for! Leave a handout.
- Ask how he/she perceives the issue. Inquire about what questions they might have, and offer to be a resource to your legislator. If they are supportive of your issue, ask how you can be helpful to him/her within and outside of the State House.

WHAT SHOULDN’T YOU SAY?
Don’t issue an ultimatum! No matter how compelling the issue, do not press a legislator to commit to a certain position in your meeting (like all of us, your legislator may need more information, or there may be other political factors of which you’re not aware).

WHAT YOUR LEGISLATOR MAY WANT TO KNOW:
“What is the bill/budget item or issue?” “How much would it cost?” “How many people in the district are affected by this issue?” and “Who, or which groups, support it and who’s against it, and why?” (if available).
WHAT TO BRING:
- A fact sheet about the bill/budget item or issue on which you are “lobbying.”
- A fact sheet about who you represent (your agency/organization/network, if applicable).
- Information that is clear, informative, and supports the point you are trying to make

TIPS ON TESTIFYING ON A BILL

WHAT TO KNOW:
- Anyone is allowed to testify on a bill at a public hearing. You can just walk in, but it is much better to sign up to testify with one of the committee staff when you arrive, or call ahead to see if you can sign up before the hearing. Call your own legislator, or the House or Senate Clerk’s office, to find out when a public hearing is scheduled for a particular bill.
- At the State House, you can go to the Legislative Documents Room (Room 428) to obtain a copy of the “Daily List of Legislative Committee Hearings” for the list of bills to be heard that day. Bills on a particular subject are usually grouped together and “heard” at a single hearing.
- Testimony can be given either in writing or verbally, which is known as “oral” testimony. Oral testimony tends to be much more powerful, but be sure to leave a written copy of your remarks with committee staff as they may review it at a later time.

WHAT TO EXPECT:

Hearings can often be long and it is almost impossible to get an exact time for when your testimony will be heard. In addition, because of their schedules and the schedule of the House or Senate sessions, legislators are often taken “out-of-turn” to give testimony – so even if you were the first one to arrive at the hearing, legislators will always be allowed to testify before members of the public. Members of the Committee may come and go from the hearing depending on what other obligations they have in the State House. Don’t take it personally if a legislator leaves during your testimony!

WHAT TO SAY:
- Be sure to state who you are and who you represent and if you are a constituent of a legislator on the committee.
- Try to be brief – it is best if you can limit your remarks to three minutes and keep your testimony simple. Your written statement can be more specific.
- Speak from your experience!
Use only irrefutable facts and never be afraid to say you “don’t know” the answer to a particular question. Offer to get back to the committee with the correct information – and be sure to follow up in a timely way.

SAMPLE TESTIMONY

Provide an opening statement: Good Morning, Thank you for giving me the opportunity to testify before you. My name is Charlotte O’Brien and I am here to testify on An Act to Provide National Background Checks.

Introduce your bill: Everyone needs to feel safe. Advocates are concerned that when a criminal background check is done on direct care staff it does not highlight ones background beyond Massachusetts. If someone has a record in Rhode Island or New Hampshire it will not appear. The entire system is based on qualified staff providing care when appropriate. This bill will extend background checks for applicants from anywhere in the United States.

Give a paragraph about your own situation: Where you live, what is your disability or your son or daughter’s disability, tell them why this legislation is important to you. I have a son who lives in a group home in Salem, my son is transported to Peabody each day. Or I was born with cerebral palsy, I graduated from Bunker Hill Community College and work at Staples.

Give some information about the bill you are testifying on: This bill will expand the capacity for background checks by the Department of Developmental Services by cross referencing fingerprints with the National Instant Criminal Background Check System (NICS). The Department of Developmental Services will work cooperatively with the Disabled Persons Protection Commission and the State Police to implement such a system.

Give a conclusion: Currently everyone receives a CORI check in order to do direct care. Unfortunately it is not enough. It is too easy for someone to live in Connecticut and Rhode Island and simply work in Massachusetts. It is important to have the capacity to do national background checks. Thank you for your attention to this important legislation.
WE NEED YOUR STORY!

Please complete and mail or email to above address

**Name of Advocate/Self-Advocate**

(circle one below)  
Level 1: Full disclosure including willing to have photo in newspaper  
Level 2: Willing to have first name with last initial in newspaper  
Level 3: Fully Anonymous

**Hometown**

**Age of Consumer:** ___

**Your Story:** What is your situation and why do you, your family or others need services? Your story can focus on successes, challenges or both. What services have made a difference; What services could if you only had them? What details brings your story to life and makes it unique?… i.e. your living situation, the impact on other children/siblings, your hobbies, your aging parents, your wonderfully supportive school system? (Your story can be as short as a paragraph and as long as several pages – whatever it takes to get a sense of what your needs are and what it will take to meet them.)
**Key Web Resources**

**The Arc of Massachusetts**  
[www.thearcofmass.org](http://www.thearcofmass.org)  
Register on home page to get updates. To contact an elected official, hit state house picture on home page to reach Arc Action Center. Budgets at State House/Policy page.

**Commonwealth of Massachusetts Web Site**  
[www.mass.gov](http://www.mass.gov)  
Includes all state government branches—executive, legislative and judicial.

**Massachusetts Legislature**  
[www.malegislature.gov](http://www.malegislature.gov)  
This web address takes you directly to Legislature page, where you can choose – on the left-hand side – to see members of the house or senate, or to view them by the city/town they represent.

**The Arc of the United States**  
[www.thearc.org](http://www.thearc.org)  
The national umbrella organization of The Arc of Massachusetts. You will find a wealth of information about national public policy issues, including federal legislative priorities and position statements.

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**Governor’s Office**

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<th>Governor Charlie Baker</th>
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<tr>
<td>Office of the Governor</td>
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<tr>
<td>State House</td>
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<tr>
<td>Room 360</td>
<td>Phone: (617) 725-4005</td>
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<tr>
<td>Boston, MA 02133</td>
<td>Fax: (617) 727-9725</td>
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**2013 Massachusetts Legislature**

**Mailing Address**  
(Elected Official’s Name)  
State House  
Room #  
Boston, MA 02133  
[www.state.ma.us/legis/](http://www.state.ma.us/legis/)

**Information Offices**

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*or toll-free outside of Boston:* 1-800-392-6090
State House Map

Basement

1st Floor