CONGRESSIONAL MEETING TIPS

In the United States, charitable organizations can advocate before the government on legislation and regulations concerning their mission and activities. As a private citizen and as an employee of a charitable organization, you have the right to lobby.

Lobbying Tips

The two keys to a useful and productive grassroots meeting with an elected official sound deceptively simple, but can make all the difference between success and failure:

1. Ask the elected official to do something.
2. Give the elected official a reason to care about doing it.

Be Prepared

Too often, people attend meetings with their elected officials with no clear reason for going. Perhaps they just want to introduce their group, or maybe they want to hear where a legislator stands on a particular issue. Both are fine reasons, but if you are a microlender or entrepreneur, you probably do not have a lot of time to spend on government relations. When you attend a meeting with your elected officials, it is the one time where all of their attention is on you and what you need. Ask them to do something, even if it is as simple as "Please save the SBA Microloan Program." Even if the elected official does not agree or says no, at least you have caused his or her office to act (which may mean they have researched the issue and found out more about microlending). Without a request, the meeting may be forgotten as soon as you leave.

In a similar fashion, it is important to make the elected official care about your issue or request. Most lawmakers will be willing to help you simply because it is their job, but a little incentive can often go a long way. Tell the elected official a little about the organization you represent: what programs you administer, how many people depend on its services and similar information. If a lawmaker cares about an issue, he or she will be more willing to help.

Be sure to spend a little time talking about the efforts in your local community and use personal examples. If a lawmaker can put a face with a cause, he or she is more likely to be sympathetic to your needs.

Here are a few other tips to help you during your lobbying meeting.

Before the Meeting

Setting Up Meetings. Setting up an appointment with your congressional representative is just like setting up a meeting with anyone else—call and ask! You can find contact information in the Government Pages of your local phone book. Alternatively, you can visit www.house.gov to find contact information for your Representative, or www.senate.gov to find contact information for your Senators. Whether you're calling their local office or their Washington, DC office, ask for the scheduler and request an appointment with your Representative or Senators.

It should be possible to see most Members of Congress, especially during congressional recesses, but sometimes schedules will prevent this and a staff person will have to be seen. Visiting with a staff person can be very useful! Many times, the staff person will have more technical knowledge about an issue than the elected official does. The elected official may rely on that person to assist in making decisions about legislation. If you meet with a congressional staffer, do not underestimate his or her influence. The staff person recommends courses of action to the Member of Congress and also informs the legislator of constituent concerns. All of the same rules apply to visiting a staff person; the staff person is simply an extension of the official. Remember to request a copy of each official's bio before the meeting. The bio will provide background on the official and may indicate particular interests.

Bring appropriate people to the meeting. While you do not want to overwhelm the lawmaker, several different voices and viewpoints can be particularly effective. Try to ensure that at least one microlender and one entrepreneur are in attendance. Four or five participants are usually the limit.

Prepare a one-page fact sheet/position paper. Any supporting documents you give to a lawmaker should be factual, brief, concise and to the point. "One pagers" with bold type and a few bulleted points are quite effective. Attach longer, supporting documentation if necessary, but do not depend on someone reading it.

Know the issue. Find out as much as you can about the subject, particularly if you expect opposition. Anticipating the opposing argument and developing effective counter arguments is essential, as is knowing which groups support or oppose your position. At the same time, you do not have to be an expert to meet with your lawmakers. Remember that they and their staffs have to handle a number of different issues, and that you may know as much or more about a particular matter. Do not be intimidated, but also be sure you have done your homework. Provide personal stories about how the proposed legislation will benefit your borrowers.

Know the legislator. The more you know about an elected official, the more you can anticipate how they will stand on an issue and what they can do to help. For example, if you know that the lawmaker has an interest in the computer field, then bring someone with a small computer business that has benefited from the program. Biographical information can be found on the Senate website (www.senate.gov) and the House of Representatives website (http://clerkweb.house.gov).

Scripting the meeting. Developing a rough script for each meeting is a good idea. Whether you're going into the meeting alone or with several colleagues, having a rough outline of points you want to make will ensure that you cover all the topics you want to. If you visit in a group, determining who is going to say what and in what order can help make the meeting go smoother. The person responsible for a particular issue shouldn't be the only one to talk, but should be the one who begins the conversation. Assign each participant one issue, whether it is general information about microlending, the SBA, the President's proposed budget, or anything else that seems relevant. If bios of each elected official have been obtained before the meetings, they may be of assistance in deciding who will speak about each issue.

NOTE: If more than one person is attending the meeting, it will be very helpful to choose a leader for each meeting. The meeting leader will be responsible for getting the talking points and other information and distributing to the other participants, and bringing any material to leave with the official. The leader should open and close the visit with the official. The leader could also help determine speaking parts and be responsible for calling the office to confirm the meeting and time.

The Meeting

The group should try to arrive 10 to 15 minutes early for the meeting. Participants should be aware that last-minute schedule changes do occur (even if a confirmation call was made earlier in the week), and it is not uncommon for a staff person to be suddenly sent to substitute at a meeting.

Do not waste time. Introduce yourselves, talk a little about your organizations, and then address the reason why you are there. If the legislator wants to speak about other matters for a little while (particularly if you have brought a personal friend), enjoy the conversation, but then steer it back to the subject matter. Even back home in the district, a legislator frequently has an extremely busy schedule. Twenty minutes is generally the most time you will have.

Make your point. Lawmakers tend to be interested in the basic story of your concerns, not the details. A few statistics and a couple of anecdotes will usually be all they need. On the other hand, many staffers will be quite knowledgeable about issues and will want to hear more specific explanations. When speaking with your Member of Congress, it is important to show how the proposed legislation will benefit your group. For example, "Without the SBA Microloan Program, we will go out of business, which will cause [25] of your constituents to be out of work."

Make your argument. If the lawmaker does not agree with you, find out why. Try to come up with a counter argument, but don't push too hard. If you cannot reach agreement, thank him or her for spending time with you and be sure to write a thank you letter. An opponent on one issue may be your closest ally on the next.

After The Meeting

Always send thank you letters after a meeting, especially if the elected official was specifically asked to do something. The key is to keep the relationship going. If you had a good meeting with an elected official, invite him or her to make a site visit to your program or to a borrower's business.

Be sure to follow up after the meeting. Contact the office a week or two after the meeting and inquire as to the status of your request. Your entire effort can be wasted unless you keep your issue on the "front burner." Write a thank you note to each member and staffer with whom you meet. This is an important tool in building your relationship. In the letter, reiterate your offer to provide your expertise in a given area, if needed. Once you have established a channel of communication with your legislator or staff person, keep it open by periodically writing with new information and your insights into other pertinent issues.

Remember that elected officials are most influenced by their constituents. That's YOU!