

Developing a Relationship with Your Representatives and Senators

A GUIDE FOR MEMBERS OF FHLBANK PITTSBURGH'S
PUBLIC POLICY NETWORK



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A Word About the Public Policy Network

The Public Policy Network is a coalition of individuals involved in affordable housing, economic development and community banking who believe that a strong FHLBank System is important to the goals of their organization.

Members include:

- Member Bankers
- Affordable Housing Advocates
- REALTORS®
- Home Builders
- Local Government Representatives
- Economic & Community Development Professionals
- Blueprint Communities

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Overview

An elected official may represent a few thousand or over half a million people. They may serve at the national, state or local level. Their districts range from neighboring townships to entire states, sometimes requiring them to focus on the needs of both densely populated urban centers and rural America. In the case of federal officials, their legislative staff monitors hundreds, even thousands of pieces of legislation on policies ranging from agriculture to national defense. Every day, these officials may receive hundreds of letters, faxes, post cards, phone calls and emails advocating positions on each and every one of these complex issues.

Despite the fact that each office has so many interests competing for attention, one person or small organization can rise above the flood of constituent requests and ongoing policy debates to become a trusted friend and invaluable resource of the elected official.

This is not hard, but it requires:

- Approaches that are based on a firm understanding of the challenges faced by elected officials and their staff;
- A willingness to help the official meet those challenges; and
- A mindset that is geared to building long-term relationships, in which day-to-day battles and setbacks do not preclude forward positive momentum in building better ties.

By following some simple guidelines and a few helpful hints, you can develop a relationship with your elected official. While some dynamics may change at the federal or local level, the approach recommended in this document applies to elected officials at all levels of government. In the next few pages, we will show you how to:

1. Start the dialogue with the official's office – rising above the noise;
2. Conduct effective meetings;
3. Produce effective letters and written material; and
4. Schedule and produce outstanding events featuring these officials.

Policymaker Relationship Guidelines – A Top Ten List

1. Policymaking is Not a Spectator Sport

Get involved and become part of the public life of these policymakers. “Oh, you again” are some of the sweetest words you can hear from a legislator.

2. Three to One – The Ratio for Success

Strive to do three things for an official for every one you ask. These might include responding to questions by getting information quickly, speaking to a reporter, scheduling an event and organizing “meet and greets” where you introduce the official to your personal network.

3. Credibility – The Coin of the Realm

Simply put, if you represent a fact, make sure it is accurate. If you commit to doing something, make sure you do it. If you ask a policymaker to take a position, make sure they are not surprised by criticism you could have predicted. As in any relationship, trust and respect are earned over time, yet one incident can undo hard-earned credibility very quickly.

4. Build a Relationship with Staff

These young, highly motivated gatekeepers have the trust and ear of legislators. Time spent with a 25-year-old staffer is extremely valuable. In the rush before a vote or a committee meeting, the congressperson will be turning to that individual for advice. Build a relationship with a staffer and you may create an internal advocate for your issue.

5. Make Policy Arguments Local and Personal

Your company or organization may not have a national reach or thousands of members, but it has something more important – a local presence. Always articulate the local impact of policy changes on people and communities represented by the elected official. If you lobby for affordable housing, focus on the needs of those served. Also, show the overall economic impact (housing for critical workers, etc.). If you represent a financial institution, focus on the benefits for your customers, employees and local economy.

While hard facts are always useful, a good anecdote can be a stronger tool. A strong emotional example of your issue’s effect on local individuals can really reach an official and be something he or she remembers and repeats in future debates.

6. Know Before You Go

Before any meeting, investigate the history of the elected official. Which committee is your legislator on? Has he/she endorsed or opposed your position?

Senator Tom Carper (DE) congratulates a first-time homebuyer at an event organized by FHLBank Pittsburgh.



Ask your colleagues about their experiences with the office. Develop an understanding of the district and research the official's past support on related issues. Key resources can be found on their official and campaign web pages, in recent news articles and on dozens of public policy watchdog groups' web pages.

For example, if your legislator is not a member of the Senate Banking Committee, requesting help on the Committee's upcoming hearing is a waste of your time and theirs. Requests that cannot be fulfilled are generally disregarded. However, asking them to contact the Chairman or a friendly colleague on the Committee would be very helpful.

7. Educate, Educate, Educate

In every encounter with legislators or their staff, educate them on the background of your organization and the latest issues. As time goes on, you will be covering ground they know – that is when you have reached an important milestone in your relationship.

8. Walk in Their Shoes

Whether developing an advocacy plan or writing your elected official, place yourself in their world. Prepare them for potential criticism by opponents. Ensure that their time is used wisely by hosting concise meetings and relevant events. And above all, avoid surprises. Watch out for them and they will learn to trust you, your information and your organization.

9. Work Around and With the Legislative Schedule

Congress and your state legislature are in session during very specific times. Consult these legislative schedules to determine when in-district events should be arranged and request meetings in Washington, D.C. or your state capital when officials are there.

10. Be Creative in Developing Events

Is your organization announcing a new program or did it recently serve its 10,000th customer? How about a board retreat, project anniversary or customer fair? Many groups fail to utilize scheduled events for other purposes. Maximize these opportunities by inviting an elected official to speak and attend.

Consider initiating a community service award that is presented to the representative or presented by the representative to the recipient. The brief ceremony creates an opportunity for media and exposure.



Congressman John Carney (DE) congratulates members of East Side Wilmington's Blueprint Communities team after being recertified for their successes in neighborhood revitalization.

Starting the Relationship

Building relationships with legislators and their staff takes time. Trust must be developed and common ground must be found. The consistent message you should give from day one is that you plan to be a positive part of that office's public life.

Initial Contact

The quickest way to start a relationship with any elected official is through a mutual friend or contact. If that is not possible, utilize these options. It is often wise to start with key staff so that when you take the relationship to the next level and meet the legislator, you have an advocate on the inside.

- 1. Contact the office (district or legislative)** with a brief letter, phone call or e-mail, asking for the legislator's position on an issue important to you. This letter will be read and answered by staff. Follow up with a request to discuss their response with either staff or the elected official.
- 2. Call the legislative office** and request to speak to the staff handling your specific issue. Introduce yourself and your organization as a constituent involved in the issue, and request an opportunity to meet and discuss current legislation. Legislative staff are generally happy to meet with constituents, especially those who present themselves as thoughtful, informed advocates. Invite the staff to visit your offices/projects.
- 3. Call the district office** and request to speak to the staff involved in outreach. It is their responsibility to develop contacts throughout the district that could be beneficial to the office. They will be happy to meet and learn about your organization. District and legislative staff serve different roles. The district staff is not involved with legislation or policy. They perform outreach, fulfill constituent requests and coordinate district activities of the representative or senator.



Senator Chris Coons tours affordable housing in the Creative District in Wilmington, DE"

Meeting Do's and Don'ts

A meeting is a wonderful opportunity to get your organization better known. Meeting in the district can be a plus, since the official will not be buffeted by quite so many competing interests in the course of the day and will be better able to focus on you.

Whether with the representative or staff, the goal of the encounter remains consistent: educate them regarding your organization and how you can be a resource.

DO	DON'T
<p>Start the meeting on a positive note by thanking the legislator or staff and confirming how much time is available. Sometimes you expect to get 15 minutes and only have 5 minutes. If you know this up front, you can adjust your presentation accordingly.</p>	<p>Go on and on, wasting time. Time is a valuable commodity. If you recognize this, they will know you are a serious player.</p> <p>View a meeting with staff as a waste of time, even if you were expecting the member.</p>
<p>Practice ahead of time with all meeting participants, and determine who will lead the discussion and cover each topic.</p>	<p>Take too many people to the meeting or allow the discussion to go off track by allowing too many advocates to speak.</p>
<p>Bring concise material describing your organization and its impact on the district. Remember, one page is better than two, two pages are better than three, and three pages, well, forget about it.</p>	<p>Have a number of irrelevant facts that deter from your main message – keep focused.</p>
<p>If you have them, bring copies of recent positive press coverage, annual reports, etc.</p>	<p>Spend the meeting reading the material.</p>
<p>Suggest potential events or tours for the congressperson or his/her staff.</p>	<p>Press the office for confirmation on availability.</p>
<p>Leave time for questions, the most important part of the meeting, since it gets to issues of concern. Be prepared to discuss controversial legislation, etc. Practice answering tough questions before the meeting, just in case.</p>	<p>Let any discussion on a controversial piece of legislation dominate the first meeting.</p>
<p>Suggest initiatives sponsored by the office involving your issue.</p>	<p>Promise what you can't deliver.</p>
<p>End with a thank you for their time and leave with a reason to follow up – an upcoming event, additional information, another meeting, etc.</p>	<p>Walk out with either side angry or feeling that this is the last meeting.</p>

Written Material

As an issue is starting to develop, it is good to present fact sheets to start laying the foundation for your position. If you can define the parameters of a debate before it is joined, you are well on your way to victory.

Good written material complements personal meetings – they go hand in hand.

A concise letter or well-designed issue brief can ensure that your arguments are clearly understood and remembered by the legislative office. These documents should enable someone reading them for the first time to develop a good understanding of the issues involved.

In-depth policy statements provide an opportunity for an organization to outline a comprehensive policy or legislative argument. Facts and statistics can be put into context, opponents' arguments can be offered and rebutted and anecdotes can be presented.

Written Advocacy Fundamentals – This applies to letters, fact sheets, etc.

While a document may be written for one set of eyes, you should always write it with the expectation that it might appear on the front page of your newspaper. This will impose some additional discipline in the drafting process.

- **Consistency:** Official and public statements on policy take time to develop and generally have the input of high-level management. As a result, officials and staff expect the stances and arguments presented to represent thinking that will remain the bedrock of your position throughout the debate.
- **Accuracy:** Do not state a fact or statistic that cannot be proved or backed up by additional documentation. Your case and reputation could be seriously damaged should an office ask for more information that really isn't available.
- **Multiple Uses:** Policy statements can be posted on websites, put in newsletters, shared with colleagues or stakeholders and provided to the media. They are bedrock principles that form the basis for your public argument. Your allies and supporters need this information to join your cause.
- **The Shorter the Better:** Legislative staff need a concise, logical argument complete with facts and anecdotal evidence. The more concise, the more likely they will be able to absorb the points you are making. Two pages should be the maximum. White space on these papers is very important – there should be lots of white space. This will help it be read by someone who has to go through hundreds of advocacy pieces a week from a variety of interests.
- **Respectfully Disagree:** Your legislator may have friends on the other side of an issue. The staffer reading it may be a former employee of your opponent. Discrediting the opposition's argument can be a good tactic as long as it is done with "fact and logic" and not emotional accusations. It is quite possible the opposition will see your document and respond to it. It always helps to be forceful yet understated in your position.

Fact Sheets/Position Papers

Fact sheets and position papers are generally crafted the same way, although fact sheets may not be as succinct in what the issue and request may be.

A good general outline for a fact sheet or position paper is:

Title:

- Name the issue.

Organization Reminder:

- Describe your organization in a brief paragraph, including the areas and constituencies you serve.

Issue Background:

- What events have brought this issue to the fore – regulatory actions, introduction of legislation, expiration of an existing provision of law, etc.
- A sentence each describing the policy pros and cons of the position you support. You may raise and rebut your opponents' arguments. If you do so, accurately represent your opponents' position so as not to damage your credibility in the future.
- Impact on the district/state if your position is either adopted or rejected. If possible, quote noted experts or relevant studies. Be careful to balance the need to make a compelling argument without losing your credibility, your most important asset.

Policy Action Requested:

- In one sentence, clearly state the desired action, i.e. introducing legislation; writing a letter to a regulator, the president, other colleagues, etc.; supporting/opposing an amendment; etc.



Congresswoman Shelley Moore Capito (WV-2) participates in a public event in Charleston, WV.

Letter Fundamentals

“On several occasions, a single, thoughtful, factually persuasive letter did change my mind or cause me to initiate a review of a previous judgment.”

– Former Arizona Rep. Morris Udall

It goes without saying that the tone of the letter should be respectful and positive. Give praise where possible. The following guidelines should be followed:

- **Focus on Your Representatives**

Legislators who represent you and your customers/clients want to know your views. Letters targeting other districts and states are ineffective unless a specific relationship exists.

- **Address (Federal)**

Honorable _____, House Office Building, Washington, DC 20515, or
Senator _____, Senate Office Building, Washington, DC 20510

- **Identify Your Group or Organization**

Succinctly (one or two sentences) identify and describe your organization.

- **Identify the Purpose of the Letter**

If you are writing in support of or opposition to a bill, give the bill number or describe it by popular title.

If you are writing about an issue, begin with a clear statement of your position.

If you are asking for a meeting or are inviting the member to attend an event, give all specific details with a telephone contact number.

- **Make Your Arguments Short and Sweet**

Letters should be one page in length and direct in their content. Your argument should be grounded on local impact and stands a better chance of being read if it is stated as concisely as the subject matter will permit.

- **Just Ask**

Requests involving legislation or scheduling should be clearly stated.

- **Utilize Letterhead and Include Your Title**

Correspondence carrying the full weight of an organization has more clout. If you are not using letterhead, remember to include all your information including organization, address, title, phone and email address.

Letter Writing Do's and Don'ts

DO	DON'T
<p>Write Your Own Views. Form letters are obvious to a legislative office and generally have less effect than a personal letter. Modify form letters and include how the legislation will affect your organization. Elected officials understand what national advocacy groups are saying; what they lack is an understanding of how the issue impacts organizations in their district.</p>	<p>Ramble. Quality is more important than quantity. Write only on the issues most important to your organization. Don't write too many letters on the same issue, unless new information is available.</p>
<p>Be Constructive. If the legislation is the wrong approach to a valid problem, suggest an alternative.</p>	<p>Make Threats, Promises, Accusations or Disparaging Remarks. Elected officials want to know the reasons for your position. Threats will not force them to reconsider a position or take a stand. Remember the goal is to develop a relationship and build a dialogue. In addition, today's foe could turn into next year's ally on a separate issue.</p>
<p>Ask Your Legislator for Their View on the Subject. As in any dialogue, it is important that both sides express their concerns on an issue. Such information will also help in planning future strategy and communication on the issue.</p>	<p>Demand a Final Decision. Legislation is complex. A single bill can contain dozens of provisions and countless details. Demanding a final commitment shows a lack of understanding regarding this process. Focus instead on getting the representative to agree with your argument and position.</p>
<p>Establish Your Expertise. Early in the letter, state your credentials as an expert on the issue in question. The number and complexity of the issues in Congress means legislators and their staff must seek the advice of experts.</p>	<p>Overstate Your Role. Never portray yourself as the self-appointed spokesperson for your industry or issue. Such claims will make your overall position less credible.</p>
<p>Explain Your Position. Simply demanding, "Vote against H.R. 100" is ineffective. State how the legislation affects your organization and the people you serve or state the impact on other segments of the legislator's district.</p>	<p>Overemphasize the Impact Within Their District. Such embellishment is not necessary to generate support and can suggest that you fail to understand the district.</p>
<p>Refer to Tangible Anecdotes and Recent Events. If the representative/senator has recently visited your facility, reference the experience in your next letter.</p>	<p>Fabricate or Exaggerate Events, Anecdotes or Data. Ultimately, these falsehoods lead to disaster and a lack of credibility for you and your organization.</p>

Letter Delivery

Many policy advocates disagree regarding the ideal way to transmit correspondence to an office. Email and faxes ensure speed, while formal letters on professional letterhead appear more official. A quick phone call to most legislative offices can unlock the answer to which format they prefer. They are usually happy to guide their constituents into the format they find easiest to process.

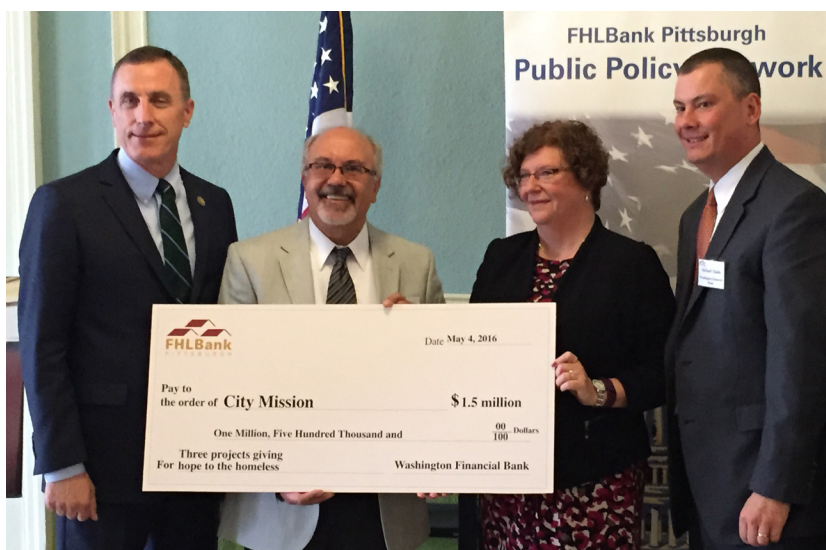
Here are some general guidelines regarding each method:

Email – Many offices have become completely electronic, preferring to receive email. The greatest downside is formatting and professionalism. You cannot utilize letterhead, guarantee that spacing and formatting remains consistent or sign in the traditional “John Hancock” format. Once a relationship with a staffer is developed, quick emails on requests, new information or an upcoming vote are ideal. Email a pdf version of your correspondence on letterhead if you prefer.

Faxes – While faxes offer the speed of an email and the professionalism of letterhead, they also take more time and cost more money. Fax toner and paper bills can add up for an office receiving thousands of form letters. The fax distribution in many offices is also typically less efficient than mail, and when your letter is coming, you are preventing anyone else from using the machine during a potentially critical time. This format is best used for timely but formal scheduling requests.

Snail Mail – Unfortunately, the more traditional format has become the preferred method for spreading terror. The Anthrax scare has significantly slowed mail within the United States Capitol and some state legislatures. While your letter will include your color letterhead and shiny signature, it may arrive a week after the vote. It is advisable to use this format only to send originals or less timely but larger materials.

Congressman Tim Murphy joins FHLBank Pittsburgh COO, Kris Williams in presenting three affordable housing grants to City Mission in Washington, PA.



Event Guidelines

Properly planned events featuring elected officials are useful tools in building relationships. A groundbreaking, tour of your facility or a public policy discussion can showcase your organization and policy messages.

Your invitation to an official represents a request to trust your ability to manage the event and properly utilize their limited time. An ill-attended, disorganized or hostile event will set back your efforts. The official is primarily looking for some combination of voter contact, press coverage and issue education. Deliver these things, and you will have a supportive official eager to do more events in the future.

There are a limitless number of activities that an organization can utilize. In many cases, the official's office will be more responsive to a unique opportunity versus attending their tenth "plant tour" of the week. Strive to make even these typical events stand out in both their usefulness and their creativity.

Scheduling Tip - Do not schedule the event first. Invite the Member indicating that you will plan the event around his/her availability.

Scheduling – Perhaps the most challenging aspect of any event is scheduling. First, ensure that the official is in the district by consulting the legislative calendar. A Member will not miss a Committee meeting or vote to attend your event. Second, schedule the event at a time that maximizes press coverage, generally 10 a.m. to 2 p.m. Finally, take into account the official's travel time. If you know he lives one hour away from the event's location, do not schedule it first thing in the morning.

Inviting the Member – Once a relationship has been developed with the staff, invites can be as informal as an email or phone call. Until then, a more formal solicitation including a brief description of the event, time, location and agenda should be sent by the head of your organization. The invitation should be addressed to the Member and sent to the scheduler and any legislative or district outreach staff involved in your issue.

Length – Provide an agenda that does not monopolize the Member's day. They have multiple requests for time when in their district. Be respectful by having an event with an efficient schedule, which includes beginning on time and ending promptly. If your event is lengthy, or the elected official's appearance is part of a larger event, build in an opportunity for them to depart in a graceful manner such as during a break for refreshments.

Invitation Tip - Indicate flexibility in your invitation. The Member may suggest a change in the event.

Press Guidelines

Press Coverage – If the event is public, the Member will seek press coverage. Coordinate messages and press contacts with the official's press secretary, offering to let the official's office approve and improve the media advisory, news release and media packet. The more involved the official's press operation becomes, the more official the event appears to the media.

Media Advisory – This media invitation announces the date, time and location of the event without giving away too many details. The goal is to gain the media's interest without giving them the entire story. A media advisory with too little information is ignored, while an advisory with too much information can lead to a premature story. Advisories should be one page or less and can be sent 3-4 business days prior to the event. If possible, highlight the approximate time in which the Member may be offering remarks.

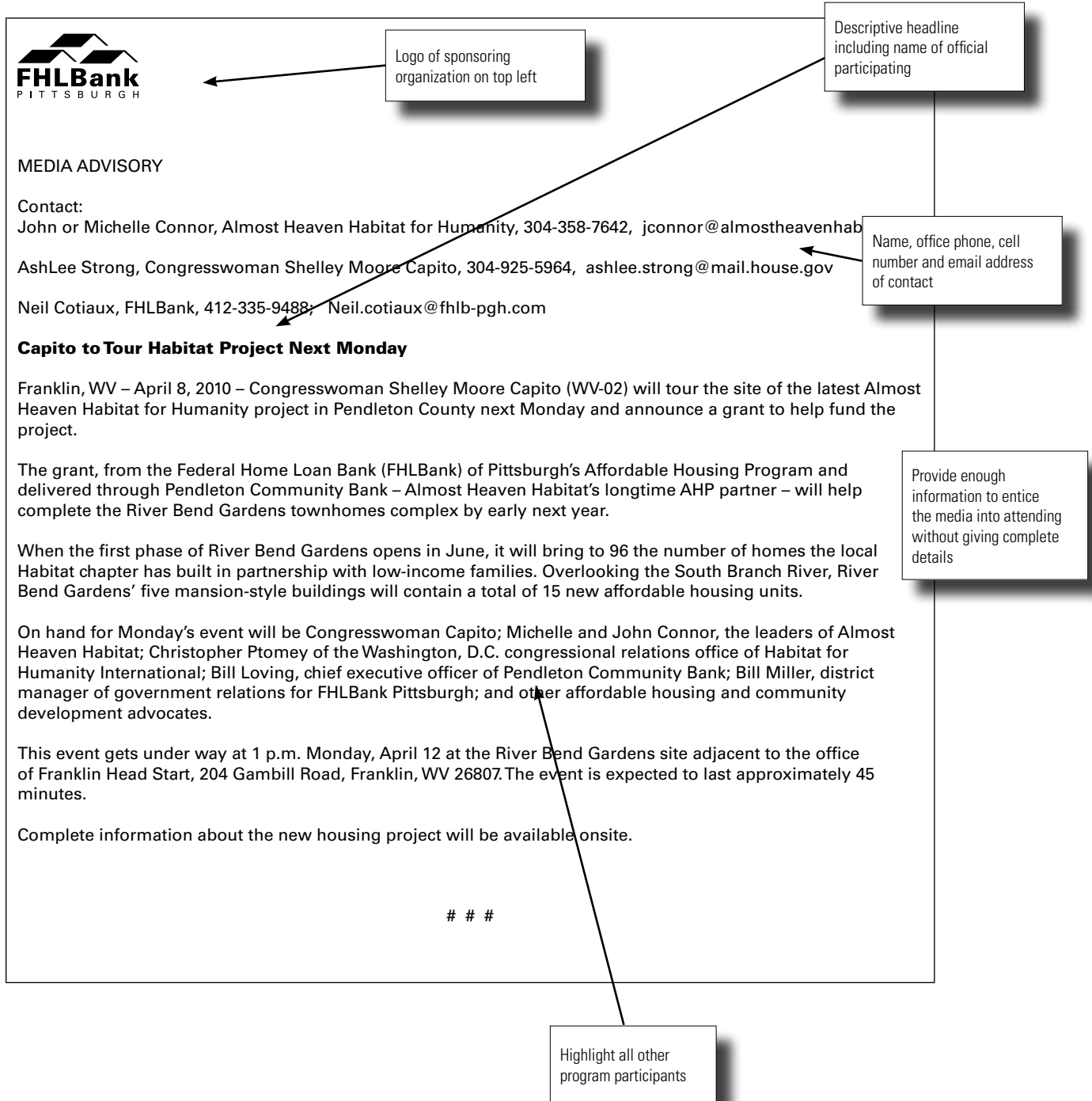
News Release – The release is a detailed description of the event including details and quotes from multiple participants. A news release is often several pages in length and distributed directly to reporters at the event. If a reporter does not attend, the release can be emailed or faxed to him/her to generate additional coverage. Avoid sending the release early, since many reporters will skip the event in favor of writing their copy using only the information in the release.

Media Packet – Many reporters require additional background provided in a more comprehensive media packet. It can include more detailed information on the organizations involved, biographies of the speakers and additional documentation. Only include items that reinforce your key messages. Less, more concise information is usually better than a stack of documents that could result in a misdirected news story.

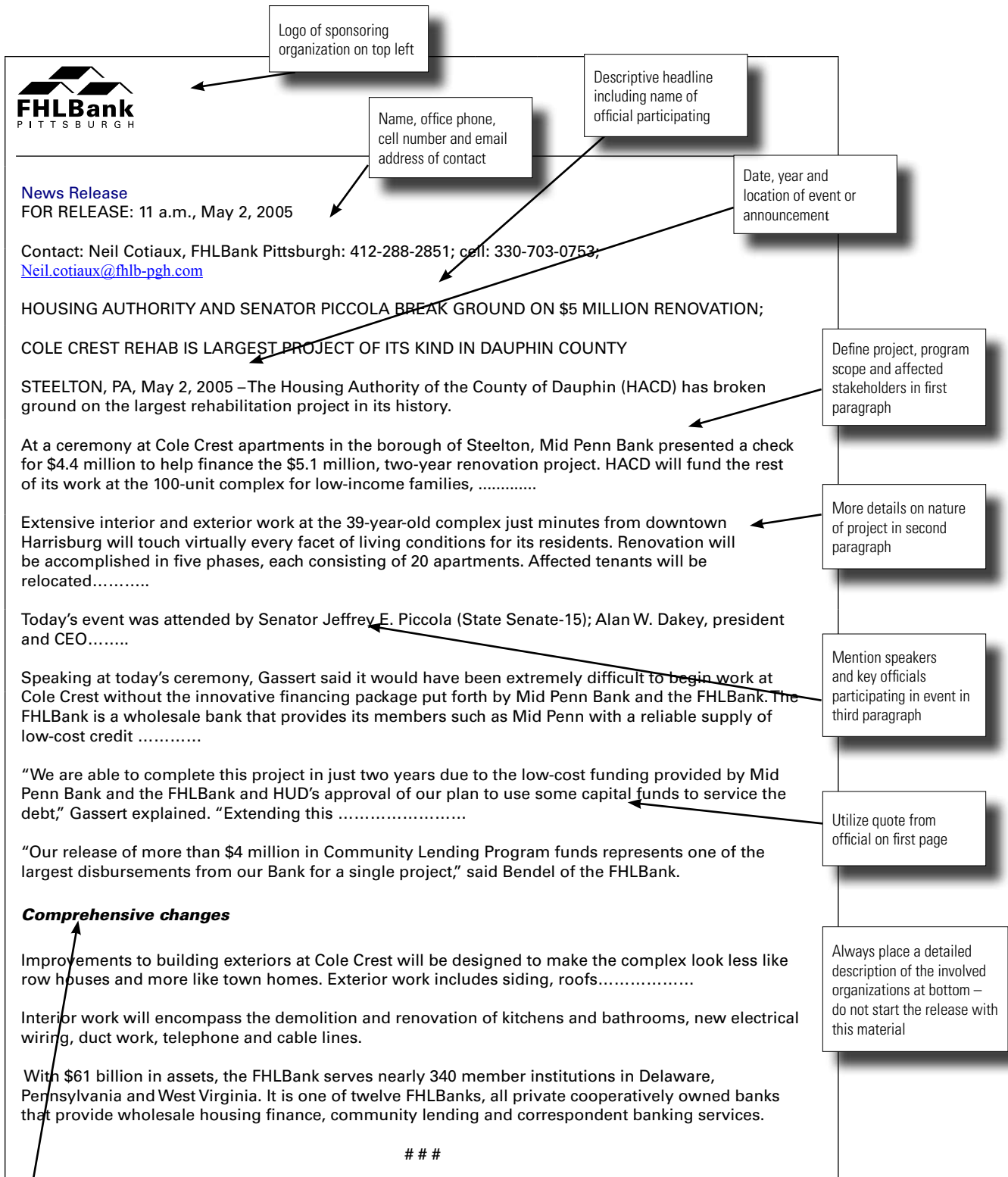
Press Tip – Reporters are pulled in many directions during a typical day. They may have a dozen media advisories inviting them to important events. To ensure that your event gets coverage, try these tips:

1. All organizations involved in the event should send media advisories.
2. Determine which reporter is likely to cover the event, and call them ahead of time to sell the importance of your event.
3. If a reporter cannot attend, offer to send the press release, email digital photographs and arrange speaker interviews.
4. For future events, develop a personal relationship with reporters who cover your area or issue.

Example Media Advisory



Example News Release



Use an italicized sub-head to avoid long, unbroken blocks of text

Provide additional details of project

Include quotes from several participants

Event Planning Do's and Don'ts

DO	DON'T
Record the event with pictures. If you or a sponsor has the budget, hire a professional photographer, and if not, enlist someone from your group to be the designated photographer.	Miss the opportunity to take pictures.
Visit and inspect the venue ahead of time, confirming its size, look and appropriateness.	Pay for a facility when a more appropriate free site is available or when your organization is serving the less fortunate.
Ask the elected official what day and time works for him/her before scheduling the event.	Schedule the event when the legislature is in session (for legislative or congressional invites).
Send a media advisory, news release and make several phone calls to the media to generate interest.	Rely on an email or a single press release to generate coverage.
Share information with the official's office including draft agendas, press materials and invite lists.	Surprise the elected official with any aspect of the event.
Hold the event in a venue just big enough to fit the expected number of people.	Hold the event in a room that holds 250 if you expect 50.
Invite as many people as possible using a formal invitation via email, mail and fax and follow up with phone calls to generate participation.	Use word of mouth or a single communication to generate participation.
Invite all partners to participate, giving individuals credit for their contributions.	Exclude anyone affiliated with the project.
Ask partners and officials to speak at the event and utilize a Master of Ceremonies to ensure event flow.	Have too many speakers or lengthy speeches.
Produce signage with targeted messages and images.	Fail to recognize other partners in your signage.
Assign staff for on-site tasks including press, welcome table, parking assistance and refreshments.	Have more than one or two individuals from your organization permitted to speak on record to media.
Obtain or rent chairs, tables, audio visual equipment and linens to ensure the professional feel of the event.	Use non-rented items without inspecting them ahead of time.

Interacting Via New and Social Media

An effective way to stay informed about a Member of Congress' positions on issues and learn what is important to them is by becoming acquainted with their new media/social media presence. Peruse their blog entries. Search on YouTube to hear their comments made on a news station or C-SPAN. Some members of Congress even have their own YouTube Channel. It's very easy to "follow" a Member of Congress on Twitter, or "like" them on Facebook, and they welcome having constituents keep current in this manner.

Remember, the Member of Congress may have thousands of others following their "tweets" on Twitter, and their status updates on Facebook. While they may include lighthearted posts (i.e. "Great ribs at Johnny's Diner!") or informative updates (i.e. "Community Food Bank is accepting donations this week, please help"), keep in mind that these are tools used by Members of Congress to stay in touch with their constituents. Be respectful of their tone, their message, and be cautious not to regard it as you would a friend or family member sharing something. If you do comment on their Facebook update, or "retweet" something they shared on Twitter, be mindful of the other fundamental do's and don'ts we've covered.

DO	DON'T
Have permission to comment on behalf of your organization or business if doing so from their page.	Comment on your personal views from a business page.
Make comments relevant to the Member's update.	Highjack their post with a comment that is unrelated.
Praise in a strategic way.	Make negative comments or chide a Member for not being able to make an appearance at your business or event.
Keep it short and sweet.	Write something longwinded or in-depth.
Remember you're engaging in a public forum.	Expect a personal reply from the Member of Congress.
Be consistent in the message of your posts and your frequency of updates.	Post something you will regret later. You can delete a Tweet, but a screenshot can live in infamy forever.



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