



# Tips & Tools

June 2002

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## Find Your Elected Officials Online:

**U.S. House of Representatives**  
(listed by state/zip code)  
[http://www.house.gov/house/MemberWWW\\_by\\_State.htm](http://www.house.gov/house/MemberWWW_by_State.htm)

**U.S. Senate**  
(listed by state)  
[http://www.senate.gov/senators/senator\\_by\\_state.cfm](http://www.senate.gov/senators/senator_by_state.cfm)

**State of Pennsylvania**  
(listed by county)  
<http://www2.legis.state.pa.us/cfdocs/findyourlegislator/find.cfm>

**Council on Foundations  
Legislative Network**  
<http://capwiz.com/cof/home/>  
Contains links to find your elected officials, as well as issue papers.

## Other Online RESOURCES:

**Council on Foundations'  
Government Relations  
Department**  
<http://www.cof.org/government/govrelations/index.htm>  
Phone: 202-467-0249  
For further assistance arranging a meeting with a Congressional representative.

**Alliance for Justice  
Foundation Advocacy Initiative**  
<http://www.afj.org/stpic.html>  
An initiative that promotes increasing foundation support to organizations that seek to influence policy and public opinion.

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## Network Building With Elected Officials

### WHY BUILD RELATIONSHIPS WITH LEGISLATORS?

Elected officials at the local, state and national level make **decisions on policies and budgets** that can have a profound affect on the work of nonprofits and foundations. Network building with elected officials is an important strategy for any nonprofit or foundation in order to **educate legislators** about the unique value and role of foundations and nonprofits, and how the sector as a whole affects people's lives in the communities they represent.

### Networking is NOT Lobbying

Lobbying is defined as an attempt to influence legislation. While private foundations cannot lobby on behalf of issue-specific bills, they can lobby around "self-defense" issues that involve legislation affecting their operations and legal status. All foundations are permitted to educate elected officials about specific issues as long as there is no legislation relative to that issue pending. *Note: There are no restrictions on lobbying as an individual citizen, no matter what your organizational affiliation may be.*

### TIPS FOR PREPARING FOR IN-PERSON MEETINGS

#### Requesting Your Meeting

- ▶ **Make your request in writing.** Send your request in writing via fax or email to the attention of the scheduler in the office you are visiting. Suggest specific times and dates for a meeting. Let them know what issue you wish to discuss, and make sure they know that you are a constituent.
- ▶ **Be Persistent:** Follow up if you do not get a response in a timely fashion. If you are unable to get an appointment with your legislator, try making an appointment with the member of his or her staff. This could include: Chief of Staff/Administrative Assistant, Legislative Director, Press Secretary or Communications Director.
- ▶ **Confirm and Reconfirm:** Once the meeting is set, send a letter confirming the date and time of the meeting along with some briefing materials. Call to reconfirm the meeting several days beforehand.

#### Prepare for Your Meeting

- ▶ **Decide who will attend the meeting.** Bringing more than four or five people can be hard to manage so keep it small. Consider bringing trustees or teaming with representatives of other foundations.
- ▶ **Agree on talking points.** It's tough to make a strong case for your position when you are disagreeing in the meeting. Decide on a few key topics and stick to them. Don't try to cover too many subjects in one visit.
- ▶ **Plan out your meeting.** Time will be limited, so be sure that you lay out the meeting beforehand, including who will start the conversation.
- ▶ **Do your homework.** Research your legislator beforehand. Find out his/her general philosophy, committee appointments, and voting record on the issues you care about.

#### Assemble Materials

- ▶ **Prepare an easy-to-handle folder of information.** Include: a fact sheet (one page) about your foundation/corporation; contact information for everyone present at the meeting; and issue papers and other relevant information about the information you are there to discuss. Make sure all materials are clear, concise, accurate and as brief as possible.

### **MEETING CONTENT:**

- ▶ **Brief Introduction.** Start off by introducing yourself, thanking the member for his/her time, and spending a few minutes providing background on your organization. Mention any personal, professional or political connections you may have.
- ▶ **The Reason for Your Visit.** Talk about the important role philanthropy plays on his/her district and mention specifics about your organization, such as how much you give annually and who you support with your grants. Emphasize the impact that the work your foundation/corporation and that of your grantees has in his/her district. Cite specific examples.
- ▶ **Legislative Issues.** Address any specific legislation that falls within the “self-defense” criteria. Provide issue papers (available through DVG or COF).
- ▶ **Be Sure to Ask these Important Questions-**
  - *Would the member like to receive more information about the philanthropic sector in his/her district?*
  - *Which staff person should be the main contact person for follow-up?*
  - *How can you be of help to your legislator?*
- ▶ **Thank You.** Thank the member once again for his/her time, and be sure to exchange business cards before you leave.

### **Also During the Meeting**

- ▶ **Keep it short.** Bear in mind that you will have 20 minutes or less with a staff person, and as little as 10 minutes if you meet with a legislator.
- ▶ **Stick to your talking points!** Conversations can often stray, so do your best to stay on message. If you are discussing specific legislation (relative to “self-defense” issues), state your position clearly.
- ▶ **If you don't know something, say so.** It's fine to tell the legislator that you will need to follow-up with information in response to a specific question. This gives you the chance to contact them again about the issue. Be sure to follow up with requested information promptly.
- ▶ **Offer yourself as a resource.** Reiterate your availability to serve as a resource about the charitable sector or specific issues where you have expertise. Be sure to give the legislator contact information so he/she can follow-up with you if necessary.

### **After the Meeting – FOLLOW-UP, FOLLOW-UP, FOLLOW-UP!**

- ▶ **Send a thank you letter promptly.** The letter should include: recognition and appreciation of the member's time spent meeting with you, a brief recap of the issues discussed, an offer to send additional information (or inclusion of materials if promised) and an indication of your hope to meet with him/her again.
- ▶ **Invitations to Events.** Include the member on guest lists to meetings and events in his/her district (award ceremonies, site visits, etc). Also consider inviting him/her to be a guest speaker at an event.
- ▶ **Send Pertinent Materials on Philanthropy.** Stay on the member's radar screen by sending carefully targeted and relevant communications, such as annual reports and news articles.
- ▶ **Renew the Acquaintance Annually.** Building relationships takes time, so try to schedule at least one face-to-face meeting each year.

### **ALTERNATIVE TYPES OF MEETINGS**

Take advantage of these other opportunities to make personal connections with your elected officials:

- ▶ **Take a Legislator to Lunch (or breakfast).** Plan an informal meeting over breakfast or lunch and ask your representative to speak briefly about issues that are on his/her mind. Invite staff and trustees from your grantmaking organization, as well as your grantees and other foundation representatives who have similar funding interests. For Congressional representatives, check the legislative calendar to see when the official may be home in the district.
- ▶ **Town Meetings.** Attend town meetings scheduled by legislators in your area to renew contact and raise awareness about sector relevant issues, such as tax incentives for charitable giving or specific issues your foundation/corporation supports.
- ▶ **Site Visits.** Work with a grantee and invite a legislator to visit an initiative funded by your organization. This not only gives your grantee the opportunity to showcase their organization's contribution to the community, but also is a powerful example of philanthropy at work. Whenever possible, select an area of interest that is a high priority on the legislator's agenda.

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**SOURCES:** Donors Forum of Chicago ([www.donorsforum.org](http://www.donorsforum.org)) and Council on Foundations ([www.cof.org](http://www.cof.org)).