Tips for Meetings with Legislators

DO

In advance

- Know who they are.
- Know who represents your museum and who represents constituents you serve that may be outside the district where your museum is located.
- Know something about them.
- Know their party, how long they have been in office, what happened during their last election, what their reputation is.
- Review their Web sites and Facebook pages.
- Know what motivates them, why they ran for office, what committees they serve on, what issues concern them.
- Understand the legislative process, what's going on when you are meeting with them, and when the best times are to make connections (In Juneau, in home districts).

At the office

- Be on time or 5 minutes early – not too early.
- If something comes up and you will be late, call their office.
- Turn off your cell phone.
- Be friendly and respectful to everyone in the office, especially staff in reception area.
- Pick up business cards for staff if they are available in the reception area.
- Notice surroundings – other visitors and who they are, décor, what's on the wall, what's on the coffee table....look for opportunities to request having your museum's products in their office.

- **(STORY)** – IA Senator's office in DC – Picture on wall from National Education Association with message - *thank you Senator Harkin for supporting public education.*

In the meeting

- Make introductions.
- Have a sense of how long the meeting will last. Ask how much time they have (but be prepared for the meeting to be cut short if there are other demands on their time.)
- Tell a story to make a connection with your museum and their constituents – "all politics are local".
- Say something to make it clear you know something about them and their interests.
- Make eye contact.
- Be honest.
- Be respectful.
- Be confident.
- Be clear.
- Be concise.
- Be flexible.
- Be patient.
- Be prepared for them to have interruptions or for the meeting to end early due to other obligations.
- Be equally respectful and attentive to staff and recognize the value and importance they play.
- Make your "ask" – be specific in what you are asking for to know where they stand on your issue.

- Make the ask in a timely manner to ensure you have time to get to the meat of the meeting.
- Ask questions and listen carefully. When you leave the meeting, you should have a clear understanding of where they stand on your issue(s).
- Ask how you can be helpful and be a resource for them.
- If you don't know the answer to something, say you will follow-up and do so in a timely manner after the visit.
- Leave behind a concise summary of your key issues. Don't overwhelm them with material or information.
- Invite them to come visit your museum.
- Ask if you can provide something from your museum (poster, catalog, brochure) for their office.
- Ask to take a picture with the elected official.
- Say thank you.

On your way out

- Thank the elected official and their staff.
- Collect business cards for staff.
- Say thank you to the receptionists/front line staff.

After the meeting

- Send a handwritten thank you note.
- Do anything that you said you would do.
- Follow up with additional information as requested in the meeting. Do so in a timely manner.
- Maintain contact with staff.

- Look for opportunities to continue to be in touch in the future (make this more than a once a year communication.)

- Find opportunities to say thank you (track their vote/participation on the issue you are asking them to support and say thank you when opportunities arise).

- Share the results of your meeting with your board members, etc.

- Include a picture from your meeting and article about the visit in your newsletter; send a copy to the elected official.

- Follow them on Facebook and Twitter; know what they are saying to their constituents.

DON'T

- Don't have personal conversations or discussions about legislators or your meetings in the hallways, elevators, outer offices, or other public spaces.

- Don't argue. If you disagree, make your point as clearly and respectfully as possible.

- Don't make up anything. If you don't know the answer to a question, offer to follow up. It's a good opportunity to make another contact.

- Don't underestimate the importance of staff – at all levels.

- Don't be disappointed if you "only" meet with a staff member.

- Don't let the casual conversation dominate the time you have and run out of time to make your ask.

Karen A. Witter

Connecting people, organizations, and ideas to achieve greater results

501(c)(3) Permissible Activities Checklist

A 501(c)(3) organization may NOT conduct partisan activities to support or oppose any candidate for public office, including -

- Endorsing a candidate.
- Making a campaign contribution to, or an expenditure for, a candidate.
- Rating candidates on who is most favorable to your issue(s).
- Letting candidates use the organization's facilities or resources, unless those resources are made equally available to all candidates at their fair market value.

Activities 501(c)(3) Organizations CAN Conduct on a Nonpartisan Basis

Nonprofits can conduct a wide range of nonpartisan engagement activities to encourage voter participation and educate voters.

→ Conduct or Promote Voter Registration

Make registration forms available at the information desk, actively table during peak hours, or incorporate registration into ongoing services.

→ Host or Co-Sponsor a Candidate Forum

Help your community familiarize themselves with the candidates and where they stand on the issues.

→ Distribute Nonpartisan Sample Ballots, Candidate Questionnaires, or Voter Guides

Provide nonpartisan information about who and what is on the ballot to help your constituents and community understand what's at stake.

→ Continue Issue Advocacy During an Election

Election season is a great time to put a spotlight on your organization's mission and goals. Write an op-ed or guest column for your local paper.

→ Educate Voters on the Voting Process

Demystify the voting process by helping voters determine where, when, and how to vote. Look up polling locations and describe to new voters what will happen at the polls.

→ Encourage Staff to Serve as Poll Workers or Translators

Nonprofit staff can facilitate the democratic process and help your community participate fully on Election Day.

→ Educate the Candidates on Your Issues

Send candidates your research and policy ideas. Be sure to share the materials with every candidate in a particular race.

→ Organize Get-Out-the-Vote Activities

Offer rides to the polls, distribute cards with election information, and turn Election Day into a celebration!

→ Support or Oppose a Ballot Measure*

Take a stand on a ballot measure, particularly if it impacts your work or clients. Engaging the public around ballot measures can help further your mission and public policy goals.

→ Encourage and Remind People to Vote

Incorporate voting reminders into services and programs. Make the election visible in your communications and at your agency.

Resources

Nonprofit VOTE - www.nonprofitvote.org

- *Nonprofits, Voting and Elections: A guide to nonpartisan voter engagement for 501(c)(3) nonprofit organizations*
- "Being Nonpartisan: 501(c)(3) Guidelines for Nonprofits" webinar and PowerPoint presentation

Bolder Advocacy (Alliance for Justice)
www.bolderadvocacy.org

- *The Rules of the Game*
- "Election Checklist for 501(c)(3) Public Charities"

IRS - www.irs.gov

- "Election Year Activities for Section 501(c)(3) Organizations" (FS-2006-17, February 2006)
- "Political Campaigns and Charities: A Presentation" - www.stayexempt.irs.gov

* Remember that advocating for or against a ballot measure is lobbying, not electioneering. 501(c)(3) nonprofits are free to take sides or to stay neutral.

Nonprofit VOTE
www.nonprofitvote.org

Advocacy – A Best Practice for Museums

Tell your story….Beat the drum

Things I will do to advocate for my museum and the museum field.

1. _____

   _____

   _____

2. _____

   _____

   _____

3. _____

   _____

   _____

Notes:

Advocacy –
A best practice for museums

Karen A. Witter

Connecting people, organizations and ideas to achieve greater results

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Advocacy

Communicating with broad constituencies about what your museum does and why it is important.

Lobbying

Attempting to influence legislation.

Can I advocate and lobby?

YES YOU CAN!

Permissible activities for 501(c)(3)

YES

- Advocate on behalf of your museum
- Communicate with elected officials about your organization
- Respond to requests for information from elected officials
- Lobby, provided expenses are "insubstantial"
- Elect to file form 5768 with IRS to report expenditures (up to 20% of first $500K of annual expenditures)

NO

- Electioneering
- Engage in political campaign activity
- Endorse candidates
- Engage in lobbying when it constitutes a "substantial" part of the organization's activities

Advocate for your museum

Advocate for the museum field

Advocacy

Similar to donor cultivation

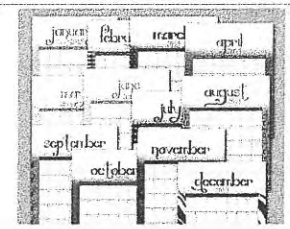
And, similar to disaster planning!

Do simple things, but do them often!

Engage your Board

- Add advocacy to meeting agenda
- Conduct advocacy training
- Include advocacy in job descriptions
- Invite people with advocacy skills to serve on the board
- Share stories

Create an advocacy plan



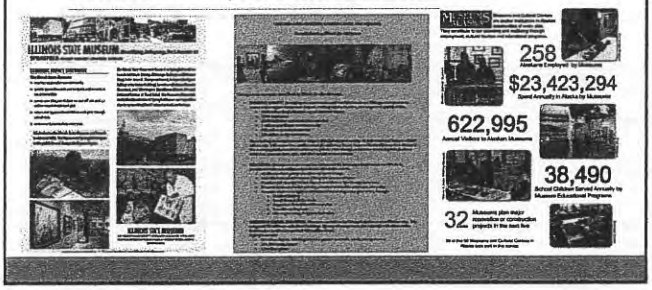
Advocate for the field

Advocacy Resources – AAM

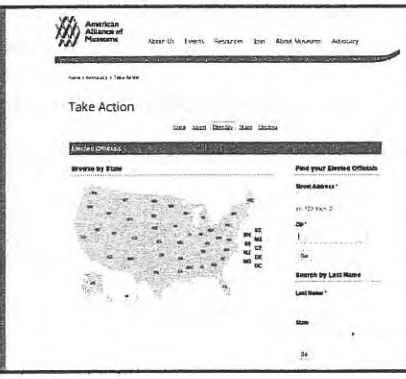
www.aam-us.org/advocacy

- Economic Impact Template
- Sample Economic Impact Statements
- Find your legislators (state and federal)
- Issue Briefs
- Action Alerts
- Advocacy Articles
- Templates to contact members of Congress

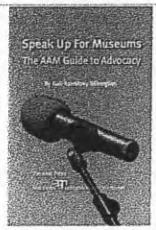
Economic Impact Statements



Find your state and federal legislators

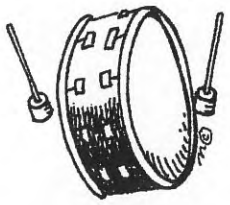


Publications



Magnetic Museums

- Build core alignment
- Embrace 360 degree engagement
- Empower others
- Widen the circle and invite the outside in
- Become essential
- Build trust through high performance

Tell your story

Beat the drum