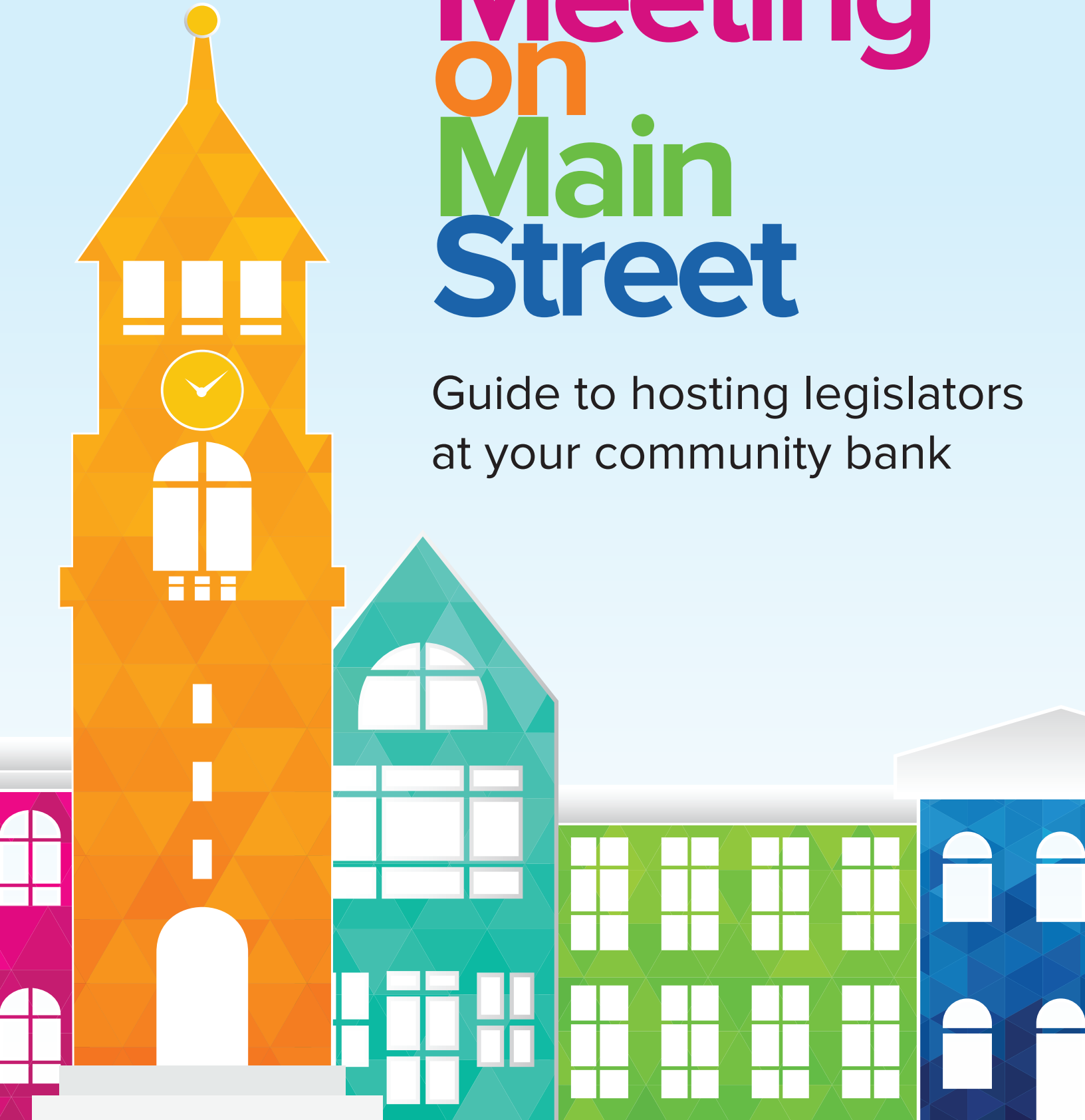




INDEPENDENT COMMUNITY  
BANKERS *of* AMERICA®

# Meeting on Main Street

Guide to hosting legislators  
at your community bank





The foundation for effective community banking advocacy is forming and developing relationships with legislators. By building a relationship with your U.S. senators and representative, you advance ICBA's legislative and regulatory priorities. When a federal lawmaker has a question about the financial services industry, you or someone at your bank should be their first call as a principal constituent.

Facetime is important. By setting up in-district meetings, attending town halls, or inviting your lawmakers to your bank, you will build a meaningful relationship over time.

## Introduction

Hosting a member of Congress at your bank is an excellent opportunity to educate your lawmaker about the unique and important role of community banking in your area and across the nation.

By personally walking your lawmakers and their legislative staff through the daily complexities and frustrations community bankers experience in the current regulatory environment, you can help to frame their understanding of the urgent need to find solutions.

Use the instructions below as a guide to engage your lawmakers' offices and bring them into your bank. If you do not know who your federal lawmakers are, you can search to find your representatives and senators here at this [link](#).

## Current Political Environment

With thousands of community bankers weighing in across the nation, ICBA is leading the fight on Capitol Hill to reduce the regulatory burden on community banks. These efforts were rewarded with the successful enactment of regulatory relief in S. 2155 earlier this year. We want to sustain this momentum and build off this success for future victories. Numerous ICBA-advocated bills are still pending in Congress, including measures to relieve community banks from overly aggressive rules that hinder residential and small-business lending and to help community banks raise capital.

When members of Congress visit your bank, you provide them and their staff with a personal understanding of the importance of the community banking industry. It will also give them a direct perspective of why they need to reform the nation's complex and one-size-fits-all financial regulatory system. The meetings should leave members of Congress both proud of the contributions community banks make to their local economies and frustrated by the overly burdensome regulatory environment facing the industry.

ICBA's Be Heard website and this guide will walk you through the process of scheduling, executing and following up on congressional district meetings. While ICBA's staff and community bankers across the nation continue to push for a variety of regulatory relief measures on Capitol Hill, district meetings with lawmakers at your bank are essential to demonstrating the value of community banking to your local economy. If you have any questions about setting up a bank visit, please contact ICBA Assistant Vice President of Advocacy Joshua Habursky at 202-821-4355 or [joshua.habursky@icba.org](mailto:joshua.habursky@icba.org).

# Meeting Process

## 1 SUBMIT A FORMAL REQUEST

Many lawmakers provide an online “Meeting Request” form on their individual website, which is their preferred method for scheduling a visit or meeting. Visit your legislators’ websites and look under the “Contact” section to determine a preferred method (if any) of setting up a meeting or bank visit. If a meeting submission form does not exist on the website, fax the request to your lawmaker’s office. It will be received and submitted for consideration much more quickly than a mailed letter. Make sure that you include your name and contact information (including congressional district) and mention any specific issues that you would like to discuss, such as regulatory relief.

After you send the fax or submit the request online through the website, call the lawmaker’s scheduler to confirm receipt of the request. Keep in mind that persistence is key and you may have to follow up a few times to successfully schedule a bank visit or meeting. Contacting the office early and with all the necessary details will increase the likelihood of confirming a visit or meeting.

## 2 SECURE THE MEETING

Over the coming days or weeks, the scheduler will work with you to arrange a mutually agreeable time for the meeting to occur. Reaffirm to the scheduler that you would like for your lawmaker to visit your bank, discuss how it operates in the current regulatory environment, and learn ways in which the lawmaker can assist. The more specific you can be about who will be in attendance, what will be discussed, and why you would like to meet with the lawmaker, the more likely the request will be approved.

## 3 NOTIFY ICBA AND YOUR COMMUNITY BANKING COLLEAGUES

As soon as you have confirmed a meeting with a lawmaker or one of their staff, please email all relevant details to [Joshua Habursky](#). This will help ensure that you are well-prepared for your meeting and help ICBA track our grassroots outreach. Whether providing one-pagers on the current top issues affecting your community bank, offering data on the community banking impact in the state or district, or having an ICBA lobbyist call in to the meeting to help discuss a technical policy question, ICBA will fully support your advocacy efforts. Finally, share the opportunity with your colleagues. There is strength (and influence) in numbers. Personally reach out to your fellow community bankers and state association leaders and invite them to attend.

## 4 USE ICBA AS A FOLLOW-UP RESOURCE

Hosting a meeting with your lawmaker is vital exposure for lawmakers to our unique issues, but it is equally vital to report back on the meeting’s details to Joshua Habursky. For instance, perhaps the lawmaker requested specific information that could not be provided during the meeting. Maybe he or she agreed to co-sponsor a bill and ICBA should reach out to the lawmaker’s staffer to ensure that happens. Please make sure you report the full details of your meeting through ICBA’s Congressional Meeting Report form.

**TIP:** Send a press release to your local media about the bank visit. If you need assistance, contact ICBA for help.



# Helpful Resources for Your Bank Visit or Meeting

## Be patient and courteous.

Sometimes legislators' schedules change at the last minute and you meet with staff only. These meetings with staff often last longer than meetings with the legislator, and, as trusted advisers, staff are often pivotal in determining their boss's position on a particular bill.

## Be confident, assertive and concise.

Make sure to stay on topic to the two or three major issues at hand. If you run out of time, that is OK. It provides a ready-made reason for a follow-up visit or phone call.

## Go local.

Make sure to bring the issues to the local level by making a connection between specific legislation and your community. Remind the legislator that your customers are his or her constituents. Whenever possible, focus on the experience of your customers. Highlighting this during a bank visit can be especially compelling. Keep everything tied to personal and relatable stories.

## Take pictures and share on social media.

Amplify the impact of the meeting or bank visit. See social media tips for additional information.

## Be prepared for questions.

Do your homework on the issues and be prepared to talk about how they affect your customers and business.

## Close the deal.

Don't leave the meeting without making a clear ask of the legislator. A specific request for co-sponsorship of a particular bill or a YES vote is key.

## Say thank you.

Follow up with a thank-you note to those you met with.

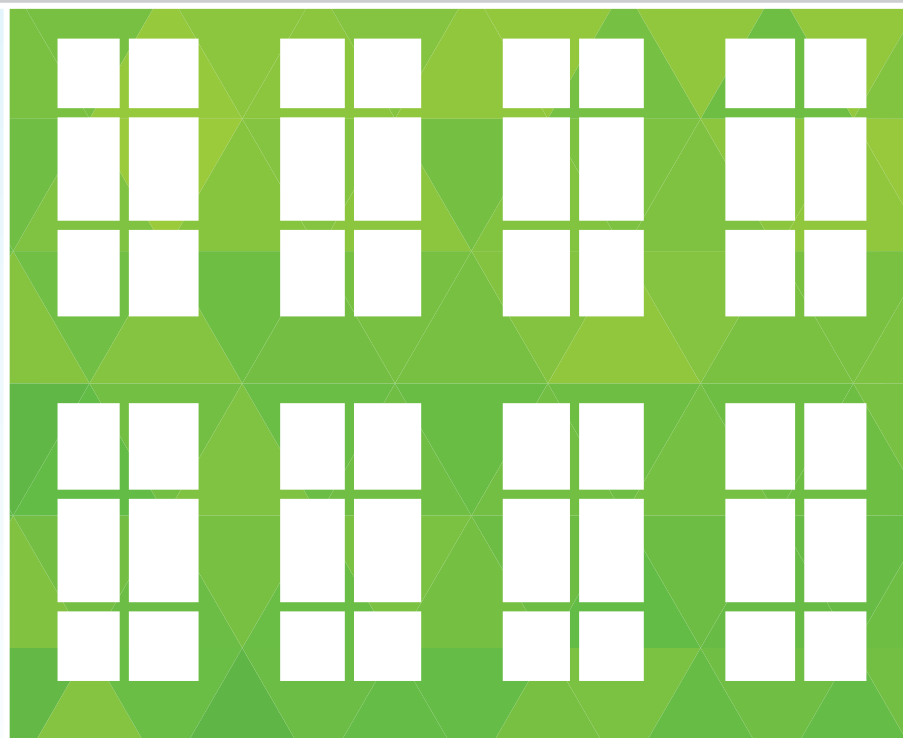
# A Note on Meeting with Staff

Legislative staff members are often overlooked when a constituent is seeking to "meet with Congress." Some people construe a visit from a lawmaker's staff instead of the actual lawmaker as a slight to their interests. This is a misconception.

Staffers may be familiar with banking in general, especially from a customer perspective, but they may not be aware of the unique mechanics of a community bank. A Community Bank 101 tutorial can go far in creating a basic understanding of the industry, such as how a loan is processed or how limited resources available are further encumbered by increasingly burdensome regulations.

Congressional staffers are a vital part of every member's office. Meeting with a lawmaker's banking or financial services staffer presents an excellent opportunity to build a relationship that allows for you to delve deeper on issues than most lawmakers may not have the time to devote to these topics. Meetings with staffers can generally be much broader in scope, and longer in length than the usual meeting with a representative or senator. Seize the opportunity to demonstrate the "big picture" of how your bank impacts the community.

**TIP:** Congressional bank visits should be welcoming and have the feel of an open house.



**TIP:** Invite a long-time customer or board member to talk with the member of Congress about the important service your bank provides.

# A Note on Social Media to Augment the Visit/Meeting

Social media can be a powerful way to get your message in front of policymakers and their staff, while giving you an additional channel to tell your community bank's unique story. As the August recess approaches, creating a plan to connect with your lawmakers on social media plays an important role in touching base ahead of your on-site meeting and getting more familiar with where they stand on the issues.



1

## PREPARE AHEAD OF TIME

- Look up your lawmakers' social media handles.
- Get active on social media ahead of time, making it easy for policymakers and their staff to see your stories, what your community bank is about and where you stand on the issues.
- Use the hashtag **#BankLocally**, making it easier for others around the nation hosting policymakers and attending town halls to get inspired by your efforts and impact.

2

## FOLLOW YOUR COLLEAGUES, POLICYMAKERS AND REGULATORS


- Try this list of [financial regulators on Twitter](#).
- Take a look at this list of [accounts on Twitter from the Hill](#).
- Follow [members of the media and financial reporters](#) for the latest news.


3


## TAKE A LITTLE HELP FROM ICBA


As meetings occur, ICBA will be following the conversations and highlighting what you're doing, using the hashtag **#BankLocally**. (Don't forget to tag us @ICBA so we can retweet!)


Customize the following tweets and add handles for policymakers you are meeting with for even more exposure!


 #CommunityBanks are economic engines behind small businesses & we're standing up for our principles of relationship banking **#BankLocally** [Click to Tweet](#)

 We have fought long and hard for tiered, proportional regulations for #CommunityBanks! Let's see this fight through! **#BankLocally** [Click to Tweet](#)

 As community bankers, now is our chance to dig deep, stay active and see #RegRelief all the way through to the end! **#BankLocally** [Click to Tweet](#)

 For XXX yrs we've worked to make a difference in our community! That's why it's important we share our challenges & impact w/ [\[Policymaker Twitter Handle Here\]](#) [Click to Tweet](#)

 We're joining community bankers across the nation, hosting our member of Congress so we can share our story! **#BankLocally** [Click to Tweet](#)

 Community banks need meaningful #RegRelief so we can re-focus on relationships & customers instead of burdensome regs! **#BankLocally** [Click to Tweet](#)

[www.icba.org](http://www.icba.org)

**TIP:** When posting photos during a visit with lawmakers, tag your member of Congress, their staff and your community bank for maximum exposure, leaving more room for 280 impactful characters in your tweet.

# Sample Meeting Request Form:

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The Honorable [FULL NAME]  
[ADDRESS]  
[CITY, STATE, ZIP]

RE: Invitation to Meet with Community Bankers (In-District Recess Meeting)

Dear Representative/Senator [LAST NAME]:

As a community banker in your district, I am writing to invite you and your staff to visit my bank for a discussion on how community banks improve our communities by funding Main Street businesses and using local dollars to help families purchase homes, finance higher education, and build financial security.

More concretely, my fellow bankers and I would like to discuss the following community bank priorities for the current Congress with you:

- Reforming the Bank Secrecy Act (BSA) and Beneficial Ownership Rule
- Passing a new Farm Bill that supports commodity prices, enhances USDA guaranteed-loan programs, and preserves crop insurance funding.
- Reauthorizing the National Flood Insurance Program.
- Reining in tax-exempt credit unions and their push to increase their field of membership and ability to raise alternative capital.
- Eliminating credit union and Farm Credit System tax exemptions as part of broader tax-reform efforts.

I would appreciate the opportunity to invite several community bankers from across the district to attend the meeting and share their experiences and input.

I will contact your scheduler to confirm receipt of this request and look forward to securing a specific meeting date and time with you or a staff member.

Sincerely,

[www.icba.org](http://www.icba.org)

If you have any questions or need assistance with setting up a bank visit or in-district meeting, please reach out to ICBA Assistant Vice President of Advocacy Joshua Habursky at 202-821-4355 or [joshua.habursky@icba.org](mailto:joshua.habursky@icba.org).

