

Meetings on Main Street.

A guide to hosting legislators at your community bank

Congress writes the laws that impact community bank's ability to serve your community!

Why isn't your **bank** hosting your member of **Congress**?!

Only you can invite them into your community bank and **show them** the critical role that you play in your community while struggling with over burdensome regulation and tax-subsidized competitors.

"I see that in order to advance the value of our bank and keep it relevant and effective in our community, we need to be involved politically. It's not something I prefer to do, but it's something I need to do."

—DAN CHRISTIANSON, F&M COMMUNITY BANK CHAIRMAN AND CEO¹

If not you, then who?

*"My member does not like sitting in an office. He prefers to be **out in the district** meeting with constituents in their **own venue**. He gains insight to their **issues, challenges, and needs** by being present on the ground."*

—DISTRICT DIRECTOR, MEMBER OF CONGRESS²

Your members of Congress want to be there!

Are you ready to speak with members of Congress face-to-face **on your turf** about overly burdensome regulation, SBA direct lending, cyber and data security, and addressing tax-exempt competitors like credit unions or Farm Credit System?

This guide will walk you through how and give you the tools and resources that you'll need to effectively meet with your member of Congress either virtually or, preferably, in person.

To **make sure your voice is heard**, [turn the page](#).

¹ Avis, Ed. (2017, March 29). *Out in the Field*. Retrieved from independentbanker.org.

² 2013 study by the Congressional Management Foundation



Getting a meeting: Step by step.

- STEP 1** Call the district office, ask how they like to receive meeting requests (usually by email or an online form).
- STEP 2** Send them the [Request a Meeting Template](#) and mention the issues you plan on discussing. (If you need help identifying these issues, ICBA is here to help.)
- STEP 3** If you get a yes, great—proceed to Step 6! If not, call the office three days later and reference your email.
- STEP 4** Follow up over email. Reference your call and previous email.
- STEP 5** If you still don't get a meeting, [we can help](#).
- STEP 6** Once it's scheduled, fill out the [pre-meeting form](#) and [email us](#).

Important tips:

- Do not mention political contributions or PACs outside of a PAC event.
This is illegal.
- Double-check all titles, names and addresses.
- Do not bad-mouth members of Congress or their political parties. This is a nonpartisan event.

Plan for your meeting.

- Block off 15 minutes on your calendar the day after your meeting to send the [Thank You Letter Template](#). This way you won't forget to follow up with the office.
- Send an email to your office contact two days prior confirming the meeting and reattaching any materials or issue briefs needed for the meeting.
- Research the member of Congress (start with their profile and top community bank bills in our [action center](#) and [bill tracker](#)), visit their website, sign up for their newsletter, set up news alerts, and follow them on Facebook and Twitter.
- Create an agenda for your group, assign roles, and REHEARSE!

What do you want the legislator to do? Be clear and concise; stick to three or four issues.

Why? Help them explain why they agree with you.

What is the local impact? How will it affect the district (i.e., voters)?

What's the personal story? Incorporate your research; be concise, passionate, and real.

If it's a tour, what will you show them? You could show them what it's like being a teller or branch manager.

- Allow time for questions.



During your meeting.

- Always address members of Congress using their proper title, e.g. Senator Jones, Representative Smith.
- Be **cognizant of their time**. Confirm meeting length and requirements.
- **Show** them how important your institution is to your community, then tell them why it's important they act.
- Make a **clear, direct ask** at the end of the meeting, but don't be pushy.
Say: "Will you co-sponsor ___?"
Not: "Do you think you might be able to support ___?"
- Take lots of photos. The best ones are candid.

ICBPAC check presentation:

- Thank them.
- Tell them the contribution from ICBPAC is the result of more than 3,000 community bankers supporting candidates who understand the unique and vital role of community banks.
- Don't link the contribution with any pending legislation. Its purpose is to help their campaign.

After your meeting: Follow up!

Just one in eight congressional offices say constituents provide timely and helpful follow-up.³ It is rare, but offices really appreciate it, which helps us be more effective, so right after the meeting, give them some public recognition by tweeting out the photo you took using ICBA's Twitter Template and then [let us know](#) about the meeting so we can put it in NewsWatch Today. The next day, send the [Thank You Letter Template](#) to the office, followed a week later by the [Follow-Up Template](#) including any additional information they asked for.

Don't stop there, though! Your goal is to position yourself as a **resource** to the office for all things community banking and how it affects your shared community. So, contact your Hill staffer regularly at relevant times. This means forwarding them the letters we send to Capitol Hill; opining on news, issues, or bills that you have insight into; and thanking them when they support you.

*Remember: Not following up **is** following up. Your staffer won't think it's important if their expert, **you**, doesn't let them know it is.*



Virtual meetings.

Congress's communication style is slow to change—they had a Western Union for telegraphs into the 1970s and almost no one had Blackberries before 2001. But the pandemic has pushed congressional offices into the digital age: decreasing the number of in-person meetings, increasing the number of virtual meetings, and relying much more on digital communication via Facebook, Twitter, their email newsletter, their website, and other media.

In fact, a Congressional Management Foundation study found that compared to the months prior to the COVID-19 crisis, 65% of Hill offices are doing significantly more video conferencing, more than half are doing significantly more constituent conference calls, and 40% are doing significantly more social media engagement.⁴ However, since the COVID-19 crisis has waned, we have found that only rarely do offices prefer virtual meetings—usually just when working from home on Mondays or Fridays. Without question being in the same room is more personal and more effective. So, when requesting a meeting, push for an in-person one, but settle for a virtual one. Here are a few best practices to help you engage with policymakers in this new world.

Virtual meeting best practices.

→ Test your tech!

Assign a **tech director** for the meeting.

Become familiar with the software platform the office prefers (Zoom, GoToMeeting, etc.).

Do an entire test run that includes ensuring lighting and sound are excellent. Consider investing in an external microphone and lights (so our message is heard, but also to set you apart from everyone else). Backlight the computer by positioning any windows behind the computer, lighting up your face.

- All community banking attendees should be there 15 minutes beforehand to work out any kinks.
- Limit to no more than four videos to a screen at a time.
- Have a backup plan for technological issues (another phone line or Zoom account).
- Don't forget to do good follow-up!

Virtual town halls.

- Town halls will usually be announced in your senator or congressman's newsletter, so subscribe on their website, which you can find [here](#). Some town halls are also listed on the nonpartisan Town Hall Project's site [here](#).
- Come prepared with thoughtful and well-researched questions. Unlike in-person town halls, staff can screen your questions at virtual events.
- Follow the same process for developing your plan in a virtual meeting: What do you want them to do? Why? What is the local impact? What is the personal story?
- Don't forget to do good follow-up!

REQUEST A MEETING TEMPLATE

Subject: Constituent Meeting

Hi *[SCHEDULER NAME]*,

We'd like to host Rep./Sen. ____ at our bank to discuss ACRE, closing the ILC loophole, creating a safe harbor for legal cannabis banking, the unfair competitive advantages enjoyed by tax-exempt credit unions and the Farm Credit System, and our opposition to SBA direct lending.

At this meeting, we'll have these people/staff/etc. in attendance:

Name _____

Address _____

City, State, ZIP _____

Our bank is located at:

Name _____

Address _____

City, State, ZIP _____

Thank you for your time. We eagerly await your reply.

[YOUR NAME]

[YOUR TITLE]

DAY AFTER THANK YOU LETTER TEMPLATE

Subject: Thank You For Your Visit

Dear *[MOC/STAFFER]*

Thank you so much for taking the time to stop by our bank yesterday. Everyone continues to rave about the visit. If you ever have any questions about community banking policy or regulations, I'm here to serve as a resource for you. My email is *[EMAIL]* and my cell is *[MOBILE NUMBER]*. I've attached a couple PDFs with info about some of what we discussed.

Please let me know next time you're in town.

[YOUR NAME]

[YOUR TITLE]

WEEK LATER FOLLOW-UP TEMPLATE LETTER

Subject: Last Week's Meeting

Hi *[STAFFER]*,

We really appreciate you and your boss stopping by our bank last week. I'd like to follow up on any questions you might have that I missed and also check the status of our asks on ___issues/ bill numbers___. *[SENTENCE LIKE: THIS PROGRAM/REGULATION IS CRITICAL/TERRIBLE FOR BANKS LIKE MINE BECAUSE ___REASON__.]*

[YOUR NAME]

[YOUR TITLE]

SOCIAL MEDIA TEMPLATE

DON'T FORGET TO INCLUDE:

#communitybanks and tag @ICBA, the member of Congress (MoC) and their staffer.

POTENTIAL TWEETS:

- Thanks to @[MEMBER] and their staff for learning about [ISSUE] @ICBA. @[MEMBER] he/she toured our ___ location today! #communitybanks
- Today @[MEMBER] toured our ___ location. They know the importance of supporting small businesses! Check out this cool photo of them [DESCRIPTION OF WHAT THEY'RE DOING IN THE PHOTO]. #communitybanks @ICBA
- Big thank you to @[MEMBER] for taking the time to drop by our ___ location to discuss important issues like [ISSUE] #communitybanks @ICBA