

VIRTUAL ADVOCACY PRIMER

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 9/11.

In much the same way, the pandemic is pushing 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.¹

This toolkit will show you with empirical evidence the best ways to communicate with and engage policymakers in this new world.

¹ 2020 survey of House and Senate senior staff, published in *The Future of Citizen Engagement: Coronavirus, Congress, and Constituent Communications*, Congressional Management Foundation, 2020.



Educate Yourself

ICBA ACTION CENTER

- » Visit the [ICBA Action Center](#) for up-to-date info on your congressperson, important bills, and our “asks.”

NEWSLETTER & WEBSITE

- » Visit your congressperson’s website and sign up for their newsletter.
- » Some offices have a splash page right on their homepage. On others, you’ll need to click **Contact** and then **Newsletter**.

NEWS ALERTS

- » Set up a Google news alert for local media.
 - Sign in at [Google’s news alert website](#).
 - Set up alerts for those you’d like to follow by putting their name, title, and topic in quotation marks. For example:
 - “Sen. Smith” “banking”
 - “Sen. Jones” “finance”
 - “Sen. Jones” “CARES Act”
 - “Sen. Smith” “Paycheck Protection Program”
- » Click **Create Alert**.
- » Set how often you’d like to be alerted via email and what sources, language, and region.

SOCIAL MEDIA

- » Follow them on [Facebook](#), [Twitter](#), and [Instagram](#).



Educate Your Member of Congress

VIRTUAL MEETINGS

- » Review the scheduling process on their website and be sure to complete every step of that process. This will make it easy for them to give you priority access (think TSA PreCheck).
- » Your request (using our template) should include:
 - **What the plan is** (tour, meeting)
 - **What you will discuss** (specific issues and relevancy to the district)
 - **The participants** (with zipcodes)
 - **Pertinent background information** (one-pagers, etc.)
- » Call the office for any clarification or to finalize any details (software preference, length).
- » Allow up to a week for them to reply.
- » Follow up with a call, email, Facebook message, and/or Twitter direct message if necessary.
- » Thank them for scheduling the meeting.
- » Alert relevant bank staff of the meeting.
- » Tell ICBA about the meeting (john.coleman@icba.org).

PERSONAL AND DIVERSE FOLLOW-UP

YOUR PLAN

- » Do research on the member (start with their profile and top community bank bills in our [action center](#)), visit their website, sign up for their newsletter, set up news alerts, and follow them on Facebook and Twitter.
- » Decide who will be in the meeting and what you will do (decide if you want to give them a virtual tour, etc.). Provide meeting attendees with background and research materials as necessary.
- » Craft the story you want to tell.
 - **What do you want them to do?** Be clear and concise; stick to 1-2 issues.
 - **Why?** Help them explain why they agree with you.
 - **What is the local impact?** How will it impact the district (i.e. voters).
 - **What's the personal story?** Incorporate your research; be concise, passionate, and real.
 - **What will your ask be?** Make sure it is direct and doable.
- » REHEARSE! You will save them time and show them the efficiencies and personal touch community banks offer.
 - Become familiar with the software platform they prefer (Zoom, GoToMeeting, etc.).
 - Do an entire test run that includes ensuring lighting and sound are excellent. Consider investing in external mic and lights (so our message is heard, but also to set you apart from everyone else). Backlight the computer (windows behind the computer, lighting up your face).
 - Assign a tech director for the meeting.
 - Save time for questions.
- » Prepare for follow-up NOW.
 - Pre-draft thank you emails before the meeting occurs (template available) with space to answer their questions.
 - Block off 30 minutes on your calendar within two days after the meeting to complete follow-up.

YOUR MEETING

- » 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.
- » Thank them for joining you.
- » Address members of Congress by proper title.
- » Execute your plan.
- » Have a backup plan on technological issues (another phone line or Zoom account).
- » Be cognizant of time—don't run long.
- » Make a clear and direct "ask."
- » Leave time for questions.
- » Thank them again.

YOUR FOLLOW-UP

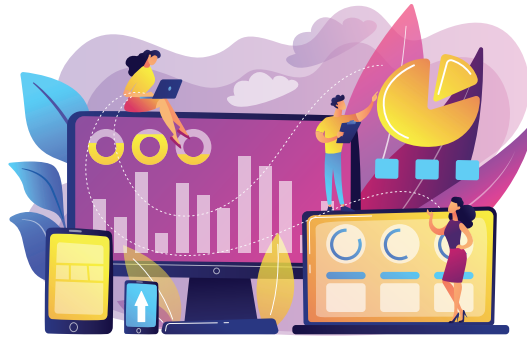
- » Follow-up starts before the meeting even happens. Use the meeting draft email you wrote before the meeting, update, and send it to your contact during the 15 minutes on your calendar you blocked off.
- » In your email, be sure to include a thank you, answer any questions, reiterate what you discussed, and provide appropriate documents.
- » Your tone should be one of an expert for the financial industry and the economic conditions of your shared community. You can influence them with your expertise and knowledge.
- » Thank them publicly on Facebook and Twitter.

VIRTUAL TOWN HALLS

- » Town halls will usually be announced in your congressperson's newsletter, so subscribe on their website.
- » Log on 15 minutes before the beginning of the town hall to work out any technological issues.
- » Come prepared with a thoughtful and well-researched question. Unlike in-person town halls, in virtual ones staff can screen your questions.
- » 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's the personal story?
- » Thank them publicly and privately and follow up.
- » Tell ICBA about the meeting (john.coleman@icba.org).

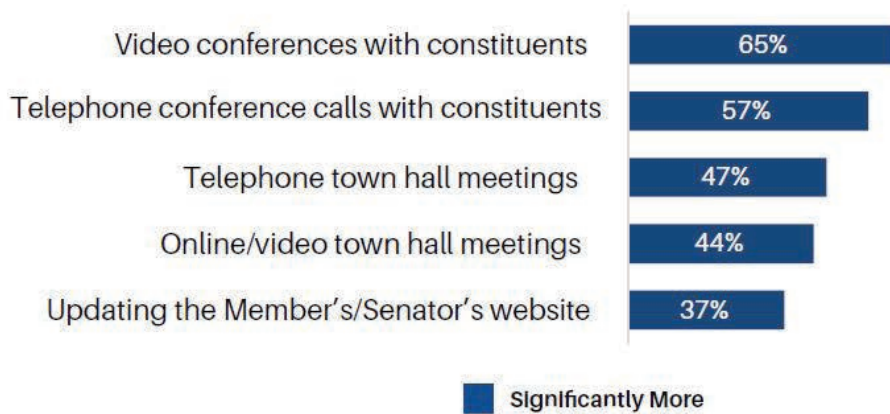
PERSONALIZE AND DIVERSIFY FOLLOW-UP

- » 65% of congressional staff say they are receiving significantly more communications from constituents, which means your follow-up needs to be helpful, personalized, diversified by channel (email, call, Facebook, Twitter), and timely.
- » Community banking offers solutions for Congress, so positioning yourself as a resource will help the staffer do their job and in turn the congressperson. Community banks, like yours, provided more than half of all Paycheck Protection Program loans and more than 70% of the ones to minority-owned small businesses.
- » Your experience building relationships with your clients will give you an advantage when building relationships with staff. Just like you personalize relationships with your clients, make your advocacy personal as well, particularly since this isn't an in-person meeting.
- » Contact your Hill contact regularly at relevant times. Forward them the letters we send up to Capitol Hill, available here, once a week. Respond to ICBA grassroots alerts to their office as NewsWatch Today pushes them out (also available in our [action center](#)) and share them with your coworkers.
- » When you read something in the local news, their newsletter, or on social media that you have insight into, let them know. And, after a meeting, be sure to thank them (privately and publicly), recap the meeting, answer any questions, and make our "asks."
- » Hill staff say that only 8% of constituents provide timely, helpful follow-up. If you provide both, they'll be thrilled to talk to you.
- » Not following up IS following up. Your staffer won't think it's important unless you, an expert, let them know.

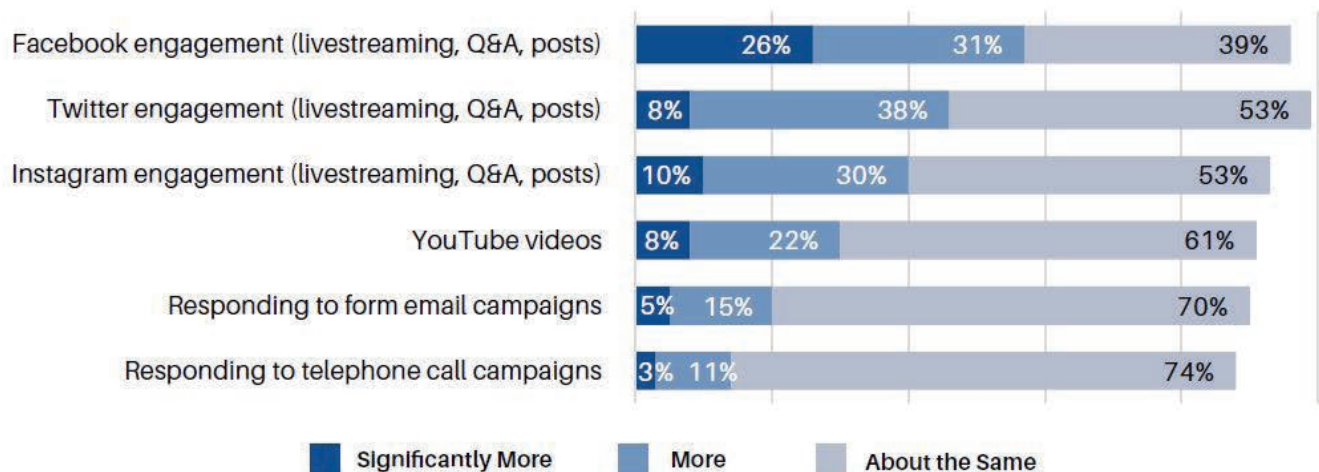


CMF REPORT RESULTS²

Compared to the months prior to the COVID-19 crisis, has your Senator/Representative done more of, less of, or about the same number of the following activities in the past two months?

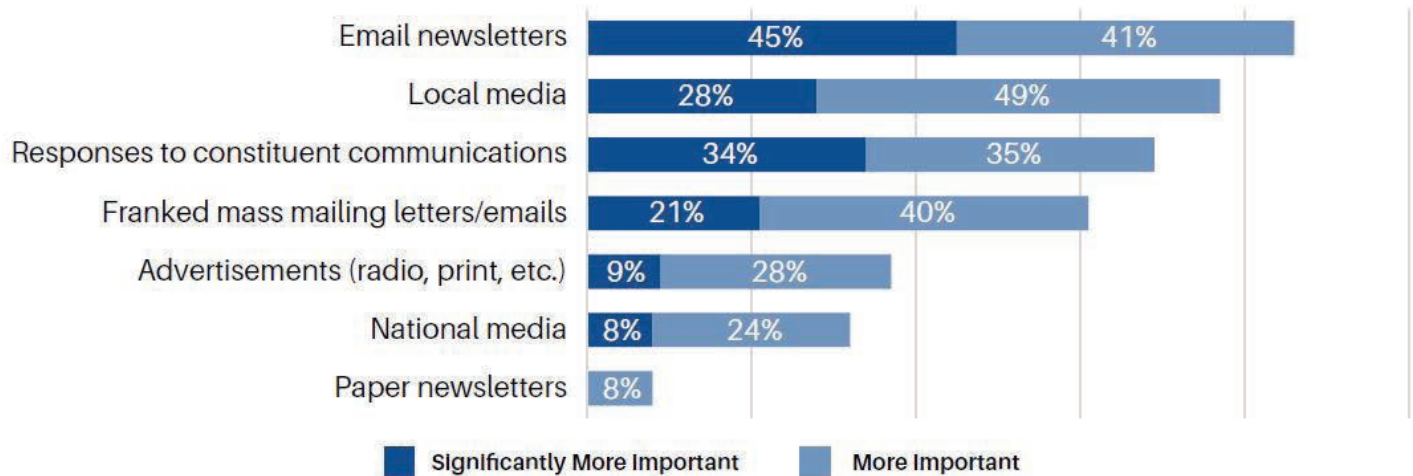


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During the COVID-19 crisis, how important has each of the following been for communicating the Senator's/Representative's views and activities to constituents?



In your opinion, what impact have the following had on your office's ability to engage effectively with constituents during the COVID-19 crisis?

■ Some & A Lot of Negative Impact
 ■ Some & A Lot of Positive Impact

