National Humanities Alliance

DISTRICT ADVOCACY GUIDE

ENGAGING MEMBERS OF CONGRESS ON A LOCAL LEVEL

Contents

Introduction

IN ORDER TO BUILD SUPPORT FOR HUMANITIES FUNDING IN CONGRESS, we need to ensure that Members of Congress understand the benefit of local humanities initiatives in their districts and states. Raising this awareness in Congress hinges on connecting local humanities scholars, advocates, and organizations with their Members of Congress and creating opportunities for these groups and individuals to share the impact of the humanities in their communities. During the National Humanities Alliance (NHA) Annual Meeting and Humanities Advocacy Day each year in March, we provide the opportunity for humanities advocates from around the country to build relationships with their elected officials in Washington, D.C. At this gathering, NHA organizes attendees into state-level delegations who meet together with their senators and representatives on Capitol Hill. Advocates share the positive impact of the federal humanities funding in their communities, on their organizations, and at their colleges and universities.

In addition to meeting with Members of Congress in Washington, another equally important way for advocates to engage with their elected officials is to schedule a visit with their local offices, or to invite them to attend a tour or special event. These in-district engagements are logistically easier and can also help establish stronger relationships over time. This District Advocacy Guide will help you become an effective advocate as you interact with your Members of Congress and their offices. The guide is divided into two sections: the first outlines how to initiate and conduct a meeting with a senator, representative, or staffer in a district or state office; the second outlines how to invite a senator, representative, or staffer to an event (such as a museum opening, public lecture, teachers' workshop, or tour) and create a meaningful role for them during the event that will foster engagement and investment in your organization.

As you consider possibilities for engaging Members of Congress, be sure to make use of on-campus resources, such as government relations offices, media relations offices, and deans' offices, and follow any guidelines in place for advocacy at your institution.

Meetings in District and State Offices

REPRESENTATIVES AND SENATORS maintain offices both in Washington and in their home states and districts. Each type of office has a slightly different set of priorities and functions. While Washington offices are centered on policymaking and congressional duties at the Capitol, district and state offices are tasked with facilitating Members' engagements at home. District offices handle constituent outreach and service, and also keep a finger on the pulse of constituents' wants and needs in the district. These offices communicate regularly with the Washington office, and messages conveyed at the district level do figure into policymaking decisions.

Many Members have more than one district office. For example, Representative Tom Cole (OK-04) has three offices in his Oklahoma district, located in Ada, Lawton, and Norman. Similarly, Senator Amy Klobuchar has four regional offices throughout Minnesota which serve, respectively, the northeastern, northwestern, metro, and central/southern regions of the state. When scheduling a meeting or event in a district, you'll want to identify which office is located nearest to you or to the event, and begin there.

The goals of a meeting at a district or state office are similar to the goals of a meeting at a Washington office:

- Establish a collegial relationship with the office;
- Educate the Member of Congress or their staff about the local impact of federal humanities funding;
- Address misconceptions about the humanities and convey to the Member the impact of your work in the community;
- Make specific requests, such as:
    - Join the bipartisan Congressional Humanities Caucus;
    - Sign a Dear Colleague letter that supports funding for the NEH (see page 6 for more information on Dear Colleague letters);
    - Sign a Dear Colleague letter that supports other humanities funding priorities;
- Gauge the Member's attitude toward federal funding for the humanities;
- Provide information that will allow a staffer to create a memo on humanities funding that will inform the Member's official policy position.

In addition to the convenience of meeting close to home, a meeting in a local office might last longer and give you more of a chance to make a connection than a meeting in the Washington office, since the schedules of the Members and staff tend to be more relaxed at home.

CONSIDER VISITING AS A GROUP: Meeting in-district also provides an opportunity to gather colleagues from a wide range of organizations (colleges, universities, museums, libraries, historical societies, etc.) to hold a shared meeting with the Member of Congress or their staff. Meetings like these give a concrete picture of the variety of humanities work in the district or state, and the range of constituents concerned with federal funding for the humanities.

SCHEDULING A MEETING

WHEN TO MEET

IF YOU WOULD LIKE TO MEET WITH YOUR SENATOR OR REPRESENTATIVE

- You can increase your chances by requesting a meeting date that falls on a week when Congress is in recess and by being flexible with your date. For example, if you are able to meet any time during the last two weeks of November, the scheduler should have lots of options for working around the Member's existing schedule.
    - NOTE: The House's recess schedule is easy to find online on the House Majority Leader's website. There are several sources for the Senate schedule, and the schedule changes frequently, making it difficult to find information about certain dates. Please reach out to NHA for help if you run into difficulties with Senate scheduling.

IF YOU WOULD LIKE TO MEET WITH A STAFFER

- It is reasonable to request any time for a meeting with a staffer.
    - District staffers work full time in the offices located in-state, so you will be able to schedule a meeting with them even if the senator or representative is in Washington, D.C.

HOW TO SCHEDULE A MEETING

MAKING CONTACT WITH THE OFFICE

- Explore your connections and resources. While anyone can schedule a meeting with a district office, if you already have a direct connection with a district staffer (or a connection through a board member or someone else in your institution), consider asking that person to facilitate a meeting. Working through an existing connection might result in a quicker response and it may also provide additional positive context for your meeting. If you work on a college or university campus, reach out to your government relations office, if you have one.
- If you don't have an existing connection, contact the Member's scheduler. Some members employ one scheduler who handles all of the meeting requests for both locations, while others have one scheduler who handles requests for the Washington office and a separate scheduler who manages the district schedule. If contact information is listed on the Member's website for the district scheduler, feel free to reach out directly. If there is only a meeting request form available, be sure to note clearly that you would like to schedule a meeting in the district and not in Washington.
- NHA can also reach out on your behalf to schedule a meeting in a district office.

IF YOU ARE HAVING TROUBLE TRACKING DOWN THE SCHEDULER

- If you have already checked a Member's website and are still unable to find information about the process for scheduling a meeting or event, you can call the Member's office and ask for the scheduler's email address directly or for the best way to request a meeting.

  Script for Finding Scheduler Contact Information:

  "Hello, I'm calling from [Organization Name], and I'm wondering if I could get the name and email address of your scheduler please?"

  OR

  "Hello, I'm calling from [Organization Name], and I'm wondering what would be the best way to schedule a meeting. I'm having trouble finding contact information for your scheduler on the website. Could you help me?"

WHAT TO SAY IN THE MEETING REQUEST

- When you reach out with a meeting request, be sure to include the following items in a clear, concise, and specific email:
  - Your organization's name (if you use an acronym, make sure to write the name out in full as well, no matter how obvious it may seem);
  - Your contact information;
  - Potential meeting dates (see above);
  - Specific district office where you would like the meeting to take place;
  - Specific meeting topic (i.e. "We would like to request a meeting with Rep. Doe to discuss the importance of native language preservation programs in our community, as well as funding for the National Endowment for the Humanities.");
  - Names and titles of each person attending the meeting with their organizational affiliations.

PREPARING FOR THE MEETING

- Research the Member and identify ways that their policy interests intersect (however loosely) with the humanities.
- Prepare to describe the impact of federal humanities funding on you or your organization.
- Research federal grants to the district or state more generally to make the case for a broader local impact.
  - Visit NEHforAll.org for profiles of compelling NEH grants.
  - Search NEH's online database to identify recent NEH grants to organizations in the district or state. (https://securegrants.neh.gov/publicquery/main.aspx)
  - Reach out to the NHA for more information on local impact of federal funding.

- Review national impact and funding priorities via our Issue Briefs. (nhalliance.org/advocacy_resources)
- Identify an event to which you might invite the Member. District staffers are focused on community outreach and constituent engagement. Presenting them with opportunities to engage with your organization is an effective way to build a relationship.
- Some opportunities for participation might include the dedication of a humanities institute, the opening of a museum exhibition, or a community forum. Each of these options can be a good opportunity to engage a Member of Congress if he or she is at home during a recess. See Section 2 of this advocacy guide for more information on events.
- Identify materials (business card, brochure, invitation) that you can leave behind.

THE MEETING

WHO YOU ARE MEETING

Although you may have a meeting with a Member of Congress, your meeting will usually be with a staffer who is entrusted to work on behalf of the Member. You might be meeting with a:

- CHIEF OF STAFF
  Coordinates the office's strategy and manages all staff, frequently acts and speaks on behalf of the Member
- DISTRICT DIRECTOR
  Manages the district staff, directs district outreach and engagement strategy, advances the agenda through high-level collaboration with other congressional offices
- FIELD REPRESENTATIVE/CONSTITUENT SERVICES REPRESENTATIVE/CASEWORK MANAGER/CONSTITUENT ADVOCATE
  Has a high level of experience with organizations and constituents in the community and a strong grasp of demographics, opinions, and trends.
- SCHEDULER/EXECUTIVE ASSISTANT/DISTRICT OFFICE MANAGER
  Manages the Member's district, congressional, travel, and personal schedules; sometimes has a minor legislative role in House offices
- STAFF ASSISTANT
  Provides support to senior staff on legislative and administrative tasks, may not have a deep knowledge of legislative issues but will likely be very willing to take the full meeting time to hear your pitch

WHAT TO BRING TO THE MEETING

There are a variety of "leave-behind" materials that might be helpful to refer to during the meeting or leave with the Member or staffer after the meeting. Potential leave-behinds include:

- DEAR COLLEAGUE LETTERS, which are written by Members of Congress and circulated to other offices. They can serve several purposes, from simply notifying other Members of an upcoming event, to calling on the head of a federal agency to support an issue, to calling for a certain appropriations funding level for a program or agency. When Members "sign on" to a Dear Colleague letter, they are lending their support to the letter's purpose or "ask." You might bring a Dear Colleague letter pertaining to your issue to a meeting along with instructions for signing on and ask the Member to lend their name in support.
- ISSUE BRIEFS, which are one-page summaries of issues or pieces of legislation that include all of the key points that someone with a limited knowledge of the situation would need to understand the basics. A brief should include key monetary figures or statistics that illustrate the scale of the issue, previous actions or progress made, an outlook on possible future outcomes, and potential next steps. Issue Briefs for NEH, Title VI and Fulbright-Hays, the National Historical Publications and Records Commission, and the Institute of Museum and Library Services are available on our website.
- IF YOUR ORGANIZATION HAS PAMPHLETS, BROCHURES, OR OTHER MATERIALS that illustrate the work you do (especially in an easily-consumable, simple, and eye-catching format), these will also make great leave-behinds that will keep the work you do fresh in the minds of Members and staffers even after your meeting.

THE CONVERSATION

- THANK, INTRODUCE, AND CONNECT: Thank the Member or staffer for meeting with you. Identify yourself and your organization. Try to connect with the Member or staffer on a personal level so that they remember you and your visit at the end of the day.
- MAKE YOUR CASE AND RELATE IT TO THE MEMBER: Drawing on the issue briefs and your own experiences, make a persuasive case about the impact of federally-funded humanities programs in a way that will resonate with the Member. Need help? Let us know!
- STATE YOUR REQUEST: State your request directly, being as specific as possible. Is there a letter you would like the Member to sign? Or a caucus for them to join? Will the Member take a more active role in championing the NEH?
- OFFER ADDITIONAL RESOURCES: Don't let the conversation end once you leave the office. Present yourself as a potential resource to the Member. Leave literature behind and offer to provide additional information.

FOLLOWING UP

Effective follow up will help build your relationship with the office and reiterate your message.

SOON AFTER THE MEETING

- Post “thank yous” to the Member on Twitter and Facebook.
- Take a picture during the meeting and include it in the thank you message on social media.

SEND A FOLLOW-UP EMAIL

- Thank them for their time and support or consideration, as appropriate. When an office is unsupportive of humanities funding, please avoid expressing disappointment.
- Send along any additional information and materials that you promised.
- Make sure that you get a business card for any staff you meet to ensure that you have their full name, title, and email address for follow-up.

Sample Email:

Dear _______ ,

Thank you so much for taking the time to meet with [Name of your organization] today! We really appreciated the opportunity to discuss [issue/project] and to give you more information about [upcoming event/opening/initiative]. As always, we are so grateful for [Member’s] support of our projects and the NEH. These programs are so important to our community. We’ll keep you updated on any developments. Additionally, please find [document/resource you discussed in meeting] attached to this email. Please don’t hesitate to reach out if you have any questions or require further information from us. Again, thank you so much for your time today.

Sincerely,

____

GIVE NHA YOUR FEEDBACK

- Please drop a quick email to Beatrice Gurwitz at bgurwitz@nhalliance.org to let us know how the meeting went.
- This information will help us:
    - Gauge the level of support and the attitudes of those who are and are not supportive;
    - Hone our arguments and strategize about new approaches to unsupportive Members;
    - Identify Members who are interested in becoming more involved in promoting the humanities.

STAY IN TOUCH

- Continue to touch base with all staffers you came in contact with.
- Thank them for any supportive comments.
- Send press clippings about your work or other updates.
- Invite the Member to future events (see below).
- Try to touch base every two to four months. If you have any specific news in the meantime, feel free to be in touch sooner.

Inviting a Member of Congress to an Event

WHILE MEETINGS PRESENT A MORE PERSONAL SETTING that allows you to make meaningful connections with Members and their staff, a Member's presence at an event can be an extremely effective way to showcase your work and highlight its impact. When possible, offer the Member an opportunity to speak at an event. This will give the Member the chance to reflect on the value of the humanities and to highlight their record on the humanities. A speaking role may also make them more likely to attend.

PLANNING AND SCHEDULING THE EVENT

POSSIBLE EVENTS

- A performance or a showcase of your work
- A breakfast, lunch, or dinner featuring a speaker who will present on a topic pertinent to your mission
- A gala or benefit dinner
- A celebration of a milestone or an award you have received (i.e. receipt of a grant, award from the community for your work)
- A workshop for teachers or other professionals visiting from out of town

CONSIDER THE TIMING

- When possible, schedule your event far in advance. You'll want to reach out to the Member's scheduler about two months before the event if you would like them to speak and about one month in advance of the event if you would just like them to attend.
- Plan around Congressional recesses. You can use the House and Senate online session calendars to determine when the House or Senate are out of session.
  - NOTE: The House's recess schedule is easy to find online on the House Majority Leader's website. There are several sources for the Senate schedule, and the schedule changes frequently, making it difficult to find information about certain dates. Please reach out to NHA for help if you run into difficulties with Senate scheduling.
- Even if you can't schedule your event during a recess, send an invitation anyway. A Member might happen to be home for another event, or they might be willing to send a staffer in their place.

SCHEDULING YOUR EVENT

HOW TO REACH OUT

- Explore your connections and resources. While anyone can invite the Member to an event, if you already have a direct connection with a district staffer (or a connection through a board member or someone else in your institution), consider asking that person to facilitate the request.
- If you don't have an existing connection, contact the Member's scheduler. If you work on a college or university campus, reach out to your government relations office to notify them about the event and that you would like to invite a Member of Congress. They are there to help.
- Some Members employ one scheduler who handles all of the event requests for both locations, while others have one scheduler who handles requests for the Washington office and a separate scheduler who manages the district schedule. If contact information for the district scheduler is listed on the Member's website, feel free to reach out directly. If there is only a meeting request form available, be sure to note clearly that you would like to invite the Member to an event in the district and not in Washington.

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  OR

  "Hello, I'm calling from [Organization Name], and I'm wondering what would be the best way to invite [Member's Name] to an event. I'm having trouble finding contact information for your scheduler on the website. Could you help me?"

WHAT TO SAY IN THE INVITATION

- In an initial email, be sure to include:
  - Your organization's name (If you use an acronym, be sure to include the full name as well no matter how obvious it might seem);
  - Your contact info (email and phone);
  - Date of the event (or potential dates if flexible);
  - Location of the event;
  - Event name and details;
  - Clear and detailed participation ask (i.e. "We would like to invite Rep. Doe to give a 15 minute speech to our members on the importance of native language preservation in our community.").

    - Offer to provide talking points on the requested topic if you are asking a Member to give a speech.
    - List a date by which you need an RSVP; this will help ensure that your request is handled quickly.

- Let the scheduler know if you are willing to schedule the event around the Member's schedule, and share the potential dates you've identified.

STAY FLEXIBLE

- Members have very tight and typically very fluid schedules that often change up until the last moment. Be prepared for a Member to ask for adjustments even the week of the event, such as moving their speaking time 10 minutes earlier or later, or requesting to arrive near the end of the event rather than at the beginning.
- Keep the lines of communication with the Member's scheduler open, and remember that a positive interaction with a Member at your event can be the start of an ongoing, collaborative relationship that will be to your benefit.

DAY OF THE EVENT

- SET A MEETING PLACE
  As you are planning the event, designate one of your staffers to meet the Member of Congress and their staff at a specific location upon their arrival. Share these details with the Member's office to ensure an easy meet-up on the day of the event.
- CONFIRM THE SCHEDULE
  Designate a point of contact on the Member's staff with whom you can communicate on the day of the event. Confirm the day's schedule with them and provide any updates in real time throughout the day. The scheduler will likely be your point of contact, but it may also be one of the Member's staffers who will accompany them to the event. Ask which method of communication they prefer, but be prepared to communicate via text or email—these options are usually easiest when Members are on the move.
- BACKUP PLANS
  Sometimes, Members' schedules are subject to forces beyond their control, such as changing vote schedules or emergency meetings. Have a backup plan in case the Member needs to adjust their arrival or departure time. If the Member is running late, can someone else be moved forward in the program to speak first? If they need to leave early, can you have them speak right away at the beginning of the event? Additionally, ask the Member's staff if you can print out a backup copy of any materials the Member may use for the event so that you can have them available at the venue. Many Members will speak without notes or might prefer to keep them private, but it's always good to offer.

- CONFIRM PHOTO/VIDEO
  Confirm before the event whether it's okay to photograph or videotape the Member while they are presenting. If the answer is yes, be prepared with your own equipment. Be aware that the staffer accompanying the Member may also take photos or video at the event to use for office purposes. Communicate beforehand if there are any restrictions (i.e. no photography due to sensitive art or artifacts) that the staffer will need to follow.
- PRESS
  It's essential to communicate your intentions for press involvement to the Member's staff before the event. Let them know if you plan to have media present and if so, what kind (i.e. newspaper, local broadcast news, national news outlet). Work with the Member's staff to accommodate any requests to exit or enter the event in a way that either engages or avoids the press if necessary.
- PARKING
  Provide information about parking/drop off for the Member's staff prior to the event. Most Members will be driven to the event and dropped off. Sometimes, the staffer driving will stay at the event and require a place to park or wait. They may also return at the end of the event to pick up the Member.
- GIFTS/AWARDS
  If you intend to present the Member with a gift or an award at the event, make sure that your choice falls within the acceptable standards of the gift rules for Members of Congress and their staff. The gift rules can be found on the webpages of the House and Senate ethics committees.
- FOOD/DIETARY RESTRICTIONS
  If the Member will be present at an event that involves a meal or other food and beverages, ask beforehand about any dietary restrictions that the Member might have (i.e. vegetarian, allergic to eggs, does not drink alcohol) and be sure to accommodate them.

FOLLOWING UP

SOON AFTER THE EVENT

- Post "thank yous" to the Member on Twitter and Facebook.
- Take pictures during the event and include it in the thank you message on social media.

SEND A FOLLOW-UP EMAIL

- Thank them for their time and their support.
- Make sure that you get a business card for any staff you meet over the course of the event to ensure that you have their full name, title, and email address for follow-up.

Sample Email:

Dear _______ ,

Thank you so much for attending [name of event] yesterday. Your [presence/remarks/other participation] lent so much to the event, and we really appreciated the opportunity to showcase [exhibit/project]. As always, we are so grateful for [Member's] support of our projects and the NEH. These programs are so important to our community, as you saw yesterday. We'll keep you updated as the [project/exhibit] continues. Also, as we discussed yesterday, please find [document/resource you discussed] attached to this email. Please don't hesitate to reach out if you have any questions or require further information from us. Again, thank you so much for joining us. We look forward to welcoming you again in the future!

Sincerely,

____

IN THE NEXT MONTHS

- Continue to touch base with all staffers you came in contact with.
- Thank them for any supportive comments.
- Send press clippings about your work or other updates.
- Invite the Member to future events.

GIVE NHA YOUR FEEDBACK

- Please drop a quick email to Beatrice Gurwitz at bgurwitz@nhalliance.org to let us know how the event went!
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