



LOBBYING 101: DOS AND DON'TS

Learn more at www.icba.org/advocacy

✓ DO:

- **Introduce yourself.** As a constituent, you should identify yourself and make sure to say that you are representing yourself and other community bankers in your district.
- **Be patient & courteous.** Sometimes legislator's 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' position on a particular bill.
- **Be confident, assertive, and concise.** Make sure to stay on topic to the 2-3 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 mutual district. Remind the legislator that your customers are their constituents. Whenever possible, focus on the experience of your customers.
- **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.** Leave behind a lobbying card with the staff member for them to reference. Follow up with a thank you note to those you met with. Feel free to extend an offer for the legislator to visit your bank back in the district.
- **Tell ICBA how it went.** Summarize the meeting and let ICBA congressional relations staff know how it went.

x DON'T:

- **Be late.** Traffic in Washington can be unpredictable and security lines are often long. Make sure to leave plenty of time to get to your meeting and leave heavy metal items or jewelry behind.
- **Make small talk.** Time is a limited resource! Get straight to the issues at hand. Introduce yourself and jump right into the substance.
- **Don't be overly negative.** When possible, focus on your customers and not your bank's bottom line.
- **Discuss political contributions.** It is illegal to discuss PAC contributions in government offices!
- **Forget to follow up.** A thank you note and phone call is always appreciated. Invite the lawmaker to your bank or make an effort to go to an in-district meeting or town hall.

GRASSROOTS LOBBYING

Nothing is more effective in terms of industry advocacy than a community banker relationship with a legislator. By building a relationship with your senators and representative, you are a key component to ICBA's legislative and regulatory efforts. When a lawmaker has a question about the financial services industry, you or someone at your bank should be their first call.

Facetime is important. By setting up in-district meetings, attending town halls, or inviting your lawmaker to your bank you will build a relationship over time. Be a good corporate citizen of your local community and consider hosting a fundraiser for a legislator or contributing directly to their campaign.

Communicate the Main Street perspective to your legislator. Nobody knows your customers and business better than you. Don't be a pest, but be persistent. Making regular contact with your lawmakers and staff will ensure that you become a trusted resource on issues related to community banking. Personal visits in-district or in Washington, particularly during ICBA's annual Capital Summit, personal phone calls with legislators and their staff, emails, and ICBA calls to action are all great ways to keep in touch and make sure your lawmaker knows how policy issues affect you and your customers. Every point of contact should include a direct ask for co-sponsorship or a yes/no vote on a particular piece of legislation.