

In District Meeting Request

Credit union meetings with their Representative, Senators, and candidates for federal office are an essential element of our Campaign for Common-Sense Regulation so credit unions can better serve their members. The more we engage, the more successful we will be with our advocacy campaign. In district meetings provide credit unions an opportunity to show our elected officials first-hand our commitment to the members and communities we serve in the community itself. In district meetings are also a great way to engage staff, volunteers, and even members at your credit union that are unable to travel to Washington, DC for the CUNA GAC or Hike the Hill. Research has even shown that in district meetings provide visiting advocates, such as credit unions, more time with legislators than meetings on Capitol Hill.

In district meetings allow lawmakers to hear directly from your staff and members about how important it is for constituents to access affordable, member-focused financial services. By showing legislators how your members benefit from the services you provide, we are better able to explain why the regulations imposed upon credit unions need to be updated to instill common sense and make it easier for our members to access financial services. The current burden costs credit union member-households annually \$115 on average.

There are upcoming "District Work Periods" or Recess, is when Members of Congress will be at home with their family and constituents. These legislators are looking for opportunities to meet with constituents and discuss issues important to them.

CUNA and the Leagues are asking all of our Members to try and meet with their legislators during these periods of time.

Coordinating with CUNA and your League

As you schedule meetings with your lawmakers, it's important to coordinate closely with CUNA and/or your League. Both are happy to assist in scheduling meetings if required. It is vital that credit unions keep CUNA and their League informed as to meetings scheduled, and especially the outcome of meetings and discussion with lawmakers. Sharing this intelligence is crucial to ensuring CUNA and your League can best calibrate our advocacy campaign.

How to Schedule a Visit

The following steps outline the process CUNA and the Leagues encourage when arranging credit union visits or scheduling a meeting in the legislator's district office.

Step 1: Identify your Representative and Senators

Credit unions can click [here](#) to identify your U.S. Representative using your zip code. In some instances, there is more than one Representative within the same five-digit zip code. To determine which Representative represents your credit union you can determine that with either your nine-digit zip code or your street address. The listing of U.S. Senators by state can be found [here](#).

Additionally, by running CUNA's Project Zip Code or visiting the website www.pzconline.com, a credit union can easily identify which Congressional districts within which its members reside.

Step 2: Initial Contact

The original request for a meeting should be in writing utilizing your credit union's letterhead and branding. The more details you can include about your credit union (number of members served, number of staff employed, number of locations you have, etc.) the better received your letter will be.

- Call your legislator's office and ask to whom you should send the invitation and the office's preferred method of receiving it. Many schedulers and administrative assistants to legislators prefer to receive invitations via email.
- Provide the legislator multiple options for dates when they can tour your credit union.
- Ideally, the first invitation should be a week or so prior to your desired date for the office meeting or credit union visit.
- For additional information on the protocol for addressing Members of Congress, please refer to the following link: <http://www.emilypost.com/forms-of-address/titles/777-official-forms-of-address>.

Step 3: Invitation Follow-Up

Follow-up is just as important as the initial outreach. It is important to ensure lawmakers and candidates have received your invitation, and following up helps your request stand out from the other invitations and communications they receive.

- A week after the invitation is sent to the scheduler, you should follow up by calling the office of the Member of Congress to inquire about the status of the request.
- Only resend your written invitation if asked to do so by the staff for the Member of Congress.

Step 4: In District Meeting Preparation and Meeting Etiquette

Once the meeting day and time is set, you will need to have a separate meeting with those who will be attending and set a draft agenda of what you would like to discuss. Note that this agenda may change depending upon what issues the lawmaker's staff is most knowledgeable about and what issues they are most interested.

- Indicate what topics you would like to discuss with the district staff and request that a staff member familiar with these issues be present at the meeting.
- Once the staff you will be meeting with is confirmed, request their contact information and send them any pertinent one-page documents ahead of time. This will allow the staff time to become familiar with the credit union perspective on common sense regulations.
- Arrive early for your appointment. This will allow your group time to determine what each person is going to discuss in the meeting as well as organize any materials you may have.

What Happens After the Meeting?

- If the staff has requested any further information, send it to them in the format requested.
- Send a thank you message to the lawmaker and their staff in writing.
- Send your League and/or CUNA a synopsis of the meeting and let them know if any follow-up required on legislation or technical specifics.