

Capitol Hill Meeting Etiquette

Remember:

- **Timeliness matters** – Lawmakers’ and staff’s time is constantly in flux, and if you are late it could result in reduced face-to-face time.
- **One of many** – Lawmakers and staff hold dozens of meetings a week on a wide range of policy issues. There are few credit union “experts” on the Hill. Be patient, clear, and concise when discussing the issues. Some offices may need more explanation than others.
- **Show appreciation** – Be sure to thank lawmakers’ for past support of credit unions, and be sure to thank lawmakers who pledge to support credit unions going forward.
- **Take turns speaking** – Identify a point person for each topic to speak on behalf of the group. This approach is a confirmation that the group stands as one on the issue. Try to reinforce, not repeat, information and stay on point.
- **It’s OK to disagree sometimes** – It’s great to have a lawmaker on your side on every issue. But that’s not commonplace. Expect to disagree sometimes, but don’t let disagreements define relationships.
- **Exchange business cards** – Even someone who is good with names may not remember who stopped by on any given day based on the number of people that visit. Exchange business cards, if you do not have a card, ask for a card and be sure to email your contact information afterwards. Another way to maintain a connection after the meeting is to send a linked-in request to the staff.
- **Social media** – Both the Member and you can benefit from social media if used correctly. Feel free to share your experience through pictures posted on Twitter or Instagram and include hashtags when appropriate.
- **Deliver the ‘leave behind’ document** to reinforce the issues discussed at the meeting.
- **Follow up and let CUNA know how your meeting went** – About a week after the meeting, follow up with the staffer – thank them for their time and ask if there are any lingering questions. Let CUNA know if there are any outstanding issues that need their attention or if you’d like their assistance in following-up.

Avoid:

- **Expressing disappointment for meeting with staff only or commenting on their age** – While many staffers are young, many are very well-educated and were hand-picked by their boss to represent them on the issues about which you are meeting.
- **Expressing disappointment or concern about a meeting’s location** – Space in Hill offices is very limited. Be respectful of the space and other staffers in the office. A meeting is a meeting regardless of where it’s held.
- **Confusing issues** – Act as a credit union ambassador, not a political partisan. Credit union issues are *not* partisan; express your personal opinions about other issues at another time.
- **Holding a grudge or having low expectations** – Someone who might not have been on our side on an issue last session, might be our champion this session.
- **Social media** – Do not try and catch the Congressman by posting a picture online of sensitive materials like donations. Also, do not post unflattering pictures or comments from the Congressman. If you have a questions about posting something, you probably shouldn’t. For guidance ask the staff in the office.

Lobbying is a process, not an event.

Use your Hill meetings to build or renew the credit union relationship with your elected officials and their staff.