



How to Conduct Legislative Meetings

Not every meeting with a lawmaker involves a specific issue or piece of legislation. In fact, some of the most beneficial meetings are ones where nothing is asked of the lawmaker. Instead, these are meetings where you have the opportunity to cultivate relationships with lawmakers while teaching them about what makes credit unions so unique.

Always remember, every meeting will be different. Personalities and ideologies on Capitol Hill and in the state capitol run the spectrum. Keep in mind that just as you are representing your credit union, the lawmaker you are meeting with is representing a constituency as well.

Tips for meeting with lawmakers:

- Once you have confirmed your meeting, contact the Cornerstone League's Advocacy Department to obtain legislative talking points.
- Invite other credit unions in your chapter to join you.
- Plan a convenient location for attendees to gather before the meeting so you can arrive as a group.
- Designate a spokesperson for the group – preferably, someone who has experience interacting with lawmakers.
- Remind attendees to discuss only credit union issues.
- Bring business cards, a copy of your credit union's "One-Pager", and the current Project Zip Code numbers for the district.
- Introduce yourself – tell them the name of your credit union, asset size, number of members and field of membership.
- Don't express disappointment if you have to meet with a staffer. Their time is just as valuable, and in the end the staffer is the one who must explain our issues in detail to their boss.
- Be patient, clear, and concise. Don't rush through your presentation. Lawmakers hold dozens of meetings every week on a wide range of issues, and few are credit union experts. Some may need more explanation than others.
- Tell stories that demonstrate the credit union philosophy of people helping people. For example, have you ever rewritten the terms of a loan for a member who recently lost their job? Or, helped educate someone on how they can improve their credit score?
- Make the "ask". "Can we count on your support for ____"
- Follow up with the Cornerstone League's Advocacy Department on how your meeting went.