



2017 In-District Advocacy Toolkit

Take Advantage of Time At Home

*Building a Meaningful Relationship
With Your Senators and Representatives*

In this advocacy toolkit, you will learn:

- ⇒ Why in-district advocacy is critical to your success;
- ⇒ Easy ways you can take action, whether you have 1 minute, 10 minutes, 30 minutes or more
- ⇒ How to share your efforts and build momentum with fellow Coalition members

Advocacy Starts at Home

In-District Activities Critical to Your Success

The longest Congressional Recess takes place each year in August. It is important to plan ahead and start engaging with them now on Fiscal Year (FY) 2018 appropriations, inviting them to see your work firsthand during the upcoming recess. As you know, we are in a precarious place, with the White House calling to eliminate funding for CDFI Fund Programs. The proposal would reduce the CDFI Fund to just \$14 million for administration—a \$228 million cut—leaving our country’s most distressed communities without the tools needed to grow businesses, create jobs and sustain a thriving local economy. cutting \$210 million from the Fund appropriations. In Congress, we are in a slightly better position largely due to our advocacy and education efforts targeted at legislators. This means we must continue to engage Congress and demonstrate the importance of the work CDFIs are doing in urban neighborhoods and rural communities.

The same request to eliminate appropriations for CDFI Fund programs was included for FY 17 in the President’s “skinny budget”, however, the cuts were not included in the final FY 2017 Omnibus bill. In fact, the CDFI Fund appropriation was the largest in the history of the program at \$248 million. This is in large part due to the outreach and education on the impact of CDFIs in Members’ of Congress Districts.

For this reason, we are urging those with an interest in the CDFI Fund appropriations—especially if you have a Senator on the Financial Services Subcommittee and/or the full Appropriations Committee—to take advantage of upcoming in-district periods and show their Senators and Representatives how the CDFI Fund program funding is having a positive impact on their areas. There is no substitute for a tour of an CDFI-financed business, visiting a project under development, or taking part in a ribbon-cutting—events where legislators can meet and hear about the important role CDFIs play in the community directly from constituents and local officials. This kind of interaction leaves a large and lasting impression of the effectiveness of the CDFI community.

In this toolkit, you will find tips for powerful actions to cultivate a new relationship or nurture an existing relationship with your Senators and Representatives at home and—most importantly—demonstrate the importance of the CDFI Fund appropriations in the face of persistent and stubborn credit gaps that are so pervasive in low-income urban and rural communities.

- ◆ **Invite your Senators and Representatives to visit a project.** Show them why the work you do is important to their district, and how that work is supported by CDFIs.
- ◆ **Meet one-on-one and bring some friends.** In district meetings during recess are a great way to keep the issue in the forefront of their minds and back up what they have heard from us in D.C. It also allows you to bring business owners and other beneficiaries to validate your message on the importance of CDFIs.
- ◆ **Write an Op-Ed.** Showcase the impact the CDFI Fund programs have made in your community, grow public support for your work, and inform local leaders on the importance of funding CDFIs by connecting the dot between your work and community revitalization.

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The good news is that it can take as little or as much time as you have to devote to action. While those activities listed above are the best opportunities to have an impact on your legislators, we have also listed **quick actions that can be taken in an hour or less.**

We hope these ideas will inspire you to take advantage of the upcoming congressional recess. Doing so will not only increase your power and influence on Capitol Hill, but also help ensure that our voice carries the strength that it needs to be heard on the issues that matter most. **I encourage you all to contact Ayrienne Parks to let us know how we can help.**



We Can Help!

Get Support On Your In-District Activities

We are ready to provide CDFI Coalition members with answers to questions on details, provide guidance on how to carryout activities and brainstorm ideas on activities. We can help draft and edit materials for meetings, as well as edit and strategize on op-eds and letters to the editor.

We would also like to help promote and share any events Coalition members are planning—regardless of how small or big the action—everything counts!

Contact Ayrienne Parks at ayrienne@rapoza.org or 202.393.5225 for assistance. We look forward to hearing from you.

Where Can I Find the Congressional Calendar?

The Congressional Calendars can be viewed online at <http://www.cq.com/pdf/4995406.pdf?0>

CDFIs At Work in Communities

Invite your Senators and Representatives to visit a project.

Having a politician make an on-site visit to a project business that has received financing or technical assistance from a CDFI is one of the most powerful ways to build a relationship and advocate for CDFI funding. By showing your Senators and Representatives first-hand the work that you do, how you serve your community, and how this federal programs supports your efforts, you can make a lasting impression. This is your opportunity to shine.

Showcase Your Organization

- ◆ Always try to organize your event in such a way that your Senators and Representatives can speak to, and meet with, a significant number of constituents.
- ◆ Some ideas include inviting your Senators and Representatives to:
 - ◇ Meet your staff and members of the community that you serve.
 - ◇ Celebrate your organization or project's success at a ceremony and say a few words in support of your organization.
 - ◇ Receive an award from your organization for the good work that they have done in support of your cause.
- ◆ Connect the Dots. You are not only showcasing your organization, but the federal programs that support your work. This can help turn your Representative or Senator into a champion for the federal programs on which you rely.

Make it About the Member of Congress

- ◆ If your Senator or Representative responds strongly to business interests, be sure to have the event business focused and give the business owners a prominent role.
 - ◇ Ensure the business owner will speak to the necessity of the credit to make these projects possible.
- ◆ If your Senator or Representative is on a committee that addresses the needs of a special population, such as veterans, be sure that they are featured prominently on the agenda. In short, match your program to the interest areas of your Member of Congress.
- ◆ Personalize the experience by inviting a constituent who has benefited from the project can share a personal story of how your organization impacted their life.
 - ◇ Individual clients or local government leaders can put a human face on the work you do.

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Things to Remember Before and During the Visit

- ◆ What two or three points on CDFIs do you want to drive home with your elected officials? Make sure flyers, handouts, and remarks reflect those points.
- ◆ Determine what day is the busiest at the site where you have chosen to hold the event? This is when you will want to try to hold the visit, since it will confirm the success of the project.
- ◆ **Invite your Senators and Representatives** (page 11) as far in advance as possible—they receive many invites every day, so make your invitation stand out. Let them know you are flexible and willing to accommodate the Member’s schedule.
 - ◇ Fax or Email the invite to both the office in DC (attention scheduler) and to the local office. Follow up with the scheduler after a few days.
- ◆ Maximize the value of the visit by inviting media to attend the event. Make sure the Member knows about the media’s involvement in advance and offer to coordinate with the Communications Director in the D.C. office. Include a hashtag or information on ways to follow the event on social media platforms if you have the capability to do so.
- ◆ Be sure to send information on the event to Rapoza Associates,—we can provide assistance with invitations and planning as needed and help promote the visit.
- ◆ During the visit, volunteer your organization to serve as a resource for their offices.
- ◆ Take photos, and post live to social media, being sure to tag others who are participating in the event —this will help broaden your audience and amplify your message. Some ways to get other CDFIs and partners involved is by using the following hashtags: #CDFI #FundCDFIs #CDFIsInvest.

Things to Remember After the Visit

- ◆ Send thank you letters, including any press releases, news articles, and photos from the event.
- ◆ Share photos and articles via email and through social media. You can also create a compilation of social media posts using [Storify](#). This is a great way to capture the day’s interactions and give those who were not able to attend a “big-picture” review of the event.
- ◆ Make sure that you provide the name, email address, and direct phone number of a person in your organization to serve as a constituent services liaison for the Congressional office.

Meet One-on-One with your Representatives

Keep CDFI Issues in the Forefront of Their Minds

A one-on-one meeting with your Senators and Representatives, or their staff, to discuss the issues carries much more weight than signing a petition, sending a letter, or making a phone call. Make your visit a success by following these pointers:

Preparing for the Meeting

- ◆ Know the politician. Find out their background, information on the committees they're on, and other positions they hold that might be relevant. This information helps draw a direct link between the Senator or Representative and your advocacy efforts.
- ◆ Focus on CDFIs. You won't have time to deal with more than one issue well at the meeting; every additional issue that you raise will be less important to the representative or their staff.
- ◆ Know the issue. If you don't already know, learn the facts, figures, arguments, and counter-arguments surrounding the issue before your meeting. Knowledge is the cornerstone of advocacy. Check out our [key messages](#) (page 9) and [state fact sheets](#) (Website under the Advocacy Toolkit page).
- ◆ Make it personal. Sharing a real-life example of how your organization has impacted their district will put a human face on the work you do.
- ◆ Call us. We are here to help our members successfully frame the issues and understand them inside out. Our office can offer talking points, issue briefs, research, and specific information about the Senators and Representatives that you are going to meet.

At the Meeting

- ◆ Don't skip the preliminaries. Introduce everyone present and their organizations. Thank the legislator for the opportunity to meet. Confirm how much time you have and respect those limits.
- ◆ Designate one person as the lead speaker. Cutting down on the number of people talking shows consensus, allows the Senator and Representative, and their staff, to focus on the message, and reduces the chances of getting sidetracked.
- ◆ Listen. Finding out their views is just as important as conveying yours. Ask genuine questions and respect their answers. They often contain valuable information.
- ◆ Be clear and ask for what you want. Don't walk away from a Congressional meeting without asking your Senators and Representatives to take the specific action that you want them to take. For example:
 - ◇ Convey your support of the FY 17 Omnibus Appropriations level that was passed by Congress this spring, which is the highest level of funding in CDFI Fund history and surpassed the budget request. If your Member of Congress voted for it, be sure to thank him/her.

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- ◇ Be sure to reiterate the important work you do and how that is connected to the funding levels. For more examples, read the talking points on page 9.
- ◆ End with thank you. Regardless of the outcome, thank your Senators and Representatives for the opportunity to meet and raise your concerns. Don't forget to thank their staff as well.

After the Meeting

- ◆ Follow up. Send your Senators and Representatives a formal thank you, forward any additional information, and create a written confirmation of any agreed-to actions.

Short on Time?

You Can Still Make a Difference

Do you have 5 minutes?

- ◆ Write a message on your elected officials' Facebook or Twitter pages using **key messages** (page 9) on CDFIs—and encourage others to share. Include **state-specific information** (Website under the Advocacy Toolkit page) when you craft your short message.
- ◆ Share a link to the **CDFI Coalition's 20th Anniversary Report** (Website under the Advocacy Toolkit page) and tag your Representative or Senator. If possible, highlight a profile from the Member of Congress's area.

Do you have 15 minutes?

- ◆ Send a letter or email to your Senators and Representatives urging them to support Fiscal Year 2018 funding. **Check out the House and Senate sign-on letters as an example** (Website under the Advocacy Toolkit page). For Senators, you can also share the sign-on letter led by Senator Menendez this spring and the House letter circulated by Congresswoman Carolyn Maloney. The **FY 18 Appropriations Fact Sheet** (Website under the Advocacy Toolkit page).

Do you have 30 minutes?

- ◆ Write a Letter to the Editor
 - ◇ A Letter to the Editor is typically very short, around 200 words, and in response to a to an article the media outlet recently published. **Read tips on how to write and submit it** (page 10).

Do you have an hour?

- ◆ Attend a town hall meeting.
 - ◇ If you don't have the time or resources to arrange a town hall meeting, you can still use someone else's as an opportunity to engage your Senators and Representatives. Visit your legislators' websites to find out the time and date of any upcoming town hall meetings.
 - ◇ Don't be afraid to stand up and ask questions. Make your questions precise and direct! **Contact us** if you want help crafting questions.
- ◆ Write an Op-Ed
 - ◇ Submitting an opinion piece to your local or state press is a great way to bring attention to the impact of CDFI investments in your community. Highlight the projects and the effect CDFIs have had on economic growth as well as creating and retaining jobs where they are needed the most. **Find out how to write and submit it** (page 10).
- ◆ Create a short video
 - ◇ Seeing is believing. Create a video about a great project by interviewing a local leader, business owner, and an individual from the community. Then send it to your Representative and Senators—don't forget to **share it with us too and we'll help you spread the word.**

Talking About CDFIs

Key Messages on the Credit

- ◆ **CDFIs are mission-driven financial institutions that deliver affordable credit, capital, and financial services to residents and businesses in minority and economically distressed communities.**
 - ◇ 1,049 CDFIs, including 74 Native CDFIs, have been certified to work in low-wealth communities across the country.
 - ◇ The list of institutions certified as CDFIs includes 545 loan funds, 294 credit unions, 199 depository institution holding companies, banks or thrifts, and 11 venture capital funds, located in rural and urban areas in all 50 states as well as the District of Columbia, Puerto Rico, and Guam.
 - ◇ Since 1994, the CDFI Fund has awarded more than \$2.4 billion on a competitive basis to CDFIs including Native CDFIs, small and emerging CDFIs and financial institutions through the TA, FA, BEA, and NACA Programs.
 - ◇ Before the recession, 27 percent of CDFI investments were located in these “severely distressed” communities. By 2013, that number had risen to 44 percent.

- ◆ **The underbanked communities in which CDFIs operate have good business opportunities, but lack access to patient capital.**
 - ◇ CDFIs emerged in response to the fact that many urban neighborhoods and rural areas, particularly those with high rates of poverty and unemployment, are underserved by traditional financial institutions.
 - ◇ By leveraging over \$12 in private capital to every \$1 in federal support, CDFIs are filling the yawning credit gap encountered in many communities, creating jobs improving housing and community facilities and creating economic opportunity.
 - ◇ A 2011 study by the Initiative for a Competitive Inner City found that “firms in low income census tracts received 21 percent fewer loans than would be expected, based on the number of firms in the tracts,” even with a healthy demand for capital and an untapped consumer base. This lack of capital stifles entrepreneurs and impedes growth, allowing urban decay and economic stagnation to persist in downtown areas and small towns, despite opportunities for investment.
 - ◇ The ultimate goal is to bring CDFI customers into the mainstream economy as bank customers, home owners and/or entrepreneurs.

- ◆ **CDFIs finance improved access to affordable housing, critical community facilities, and charter schools, as well as providing financing for small and growing businesses, leveraging millions of dollars for investment, improving services for the community and creating jobs and opportunities.**
 - ◇ In FY 2016, CDFIs made over 39,000 loans or investments totaling over \$3.6 billion. The average loan size was \$91,700 and financed 11,000 small businesses and 33,000 affordable housing units.

MOST IMPORTANTLY share how one of your local projects has helped a business in your area, and created jobs. Don't forget to explain how the project benefitted the community at large.

Share CDFI Success Locally

Write an Op-Ed or Letter to the Editor

Submitting an opinion piece to your local or state press is a great way to bring attention to the impact of the CDFI financing in your community. Highlight the projects and the effect this financing has had on economic growth as well as creating and retaining jobs where they are needed the most.

Editors do not publish every letter or op-ed, but they do pay attention—especially if it is well-written and timely. A Letter to the Editor is typically very short, around 200 words, and in response to a to an article the media outlet recently published. An op-ed is a longer opinion piece that provides information on a subject that would be of interest to the outlets readers. Therefore it is important to demonstrate how the issue affects individuals locally. To find out how to submit a Letter to the Editor either call or look on the outlet’s website.

- ◆ **Be timely.** The budget, unemployment, and the health of the economy can be used as a lead-in. Other opportunities include stories noting a lack of services or types of business where you can share the projects and businesses of that type that have been made possible through the work of CDFIs. For example, if a story runs on food deserts, that would be a good opportunity to discuss a grocery store that received financing. Another includes a story on soaring rent prices, which would allow you to write about CDFIs work on affordable housing.
- ◆ **Follow the rules.** Make sure to adhere to the outlet’s guidelines on length. Spell everything correctly and pay close attention to grammar—letters are not usually edited, rather the outlets select well-written letters that meet their guidelines. Include your name, full address, and phone number.
- ◆ **Be concise.** Include your main points in the first paragraph even if your media outlet length guidelines are greater than 200 words. Two to three points are ideal.
- ◆ **Avoid jargon and acronyms.** Explain points in “plain English.” This makes the information more understandable and accessible to a wider audience.

Email your letter to insure timeliness. To do this, paste the text into the body of an email—DO NOT SEND AS AN ATTACHMENT. You may also fax it, but sending it electronically is generally the preferred way to receive letters.

Lastly, be sure to copy us or forward your submission and we will have our PR Firm follow up on placement. Remember, we are here and happy to help!

Seeing Is Believing

How to Invite Your Member to Visit a Project

[DATE]

The Honorable [NAME]
US House of Representatives/U.S. Senate
[ADDRESS]
Washington, DC 20515

Dear Representative/Senator [LAST NAME]:

Federal budget discussions frequently dominate headlines and drive much of the policy conversations in Washington. As a Community Development Financial Institution (CDFI), we use federal funding to leverage capital and provide financing to distressed, underbanked communities around the country. In particular, I would like to draw your attention to the impact CDFIs have had on local economies in low income urban and rural communities in [STATE]. To better illustrate this point, I would like to invite you to tour [PROJECT], an CDFI-financed project located in [CITY], to hear from [local business/constituents/local officials].

[PROJECT] is just one example of the impact CDFI financing has in communities throughout [STATE]. CDFIs have provided [\$X] in investments and leveraged more than [\$X] in total capital to businesses and economic development projects. These investments have directly created well over [XXXX] jobs in our state.

[COMPANY] would be honored if you would join us for tour and discussion on tax reform and its effect on the people of [STATE]. We would like to invite you to join us from [TIME, e.g. 8:00-9:30 am on DATE]; but we are flexible if there is another time that would work better for your schedule. [DESCRIBE WHAT S/HE WILL SEE, I.E. We would give you a tour of our facility and provide time for you to meet some of our employees.]

I will follow up this request with your office or you may reach me at [PHONE/EMAIL].

Thank you for your attention and we hope to see you here soon.

Sincerely,
[YOUR NAME]
[TITLE]
[COMPANY]

WWW.CDFI.ORG