

Congressional Meeting Outline

As you attend meetings on Capitol Hill, keep in mind every meeting will be different. Members of Congress represent a wide array of constituents and priorities.

To get the most from your meeting we recommend you:

Be on Time.

Members and staff often have tight schedules. However, schedules change by the minute on the Hill and meetings with members of Congress can become meetings with staff. Staff-level meetings are valuable, as staff are responsible for explaining issues and vote recommendations to their bosses. Also, wait for the entire group to arrive prior to entering member's office.

Plan Ahead.

You will rarely get through each and every issue. Given the size of our delegation, it will be impossible for everyone to speak. We will delegate who will speak on behalf of each issue in order to maximize the time we have.

Be Concise.

It is very common for a member to enter the meeting late and leave early, especially when there are votes that day.

Stay on Topic.

We are focusing all of our efforts on furthering the credit union message.

Do Your Homework.

Please bring data from your credit union on our key issues. Making issues personal helps legislators understand the true importance of the issue and makes the issue easier to relate to.

Step 1: Introduction

Thank the Member and/or staff for agreeing to meet with you.

Introduce yourself, your credit union and provide business cards to the Member and staff. Provide details about your credit union (asset size, location, members served). Be sure to mention how many credit union members you have in their district.

Step 2: Explain the purpose of your visit and the items you want to discuss

Let them know that there are 5,000 credit union representatives attending CUNA's Governmental Affairs Conference, 130 of which are credit union leaders from Michigan.

Outline our legislative agenda:

- Remove barriers to allow credit unions to fully serve their members.
- Enhance merchant data security standards to prevent future data breaches.
- Preserve the credit union tax status.

Step 3: Conclude and Follow Up

Make sure the member and staff understand the main points, thank them for the meeting and always offer to provide any supplemental materials they may require. When appropriate, get a photo to share on social media.

Follow up with staff after the meeting to thank them again for meeting and check the progress on the issues discussed.