

## Advocacy 101 Toolkit

### Purpose of The Advocacy 101 Toolkit

This toolkit is to be utilized and adapted to the needs of your institution or organization. It aims to guide you through the process of contacting Members of Congress by providing advocacy activities and communication tips to get your message across.

### Why is it important?

Your voice and opinions are powerful. Members of Congress are elected to represent your concerns. It's your responsibility to make your voice heard. You can make a difference, big or small, by communicating with your Members of Congress and their Congressional staff. If you take the time to thoughtfully express your views and follow up with them, your message will have a great impact.

### How You Can Do It

#### Create Your Message

Whether you make a phone call, write a letter or email, attend a town hall meeting, or schedule a meeting, you must first be confident about your message. Before creating your message, understand CSPN's overarching policy goals and specific legislative initiatives. Give highest priority to your strongest goals. Familiarize yourself with all materials, including one-page "leave-behind" documents, your state's web content, NAST and CSPN websites, relevant social media updates, any op-eds or other media.

Start with the "ask." Think about the following questions when drafting your message.

- What do we need from a legislator?
- What do you want the legislator to cosponsor?
- What do you want the legislator to vote NO or YES on?

Supplement with an "elevator pitch" that you can comfortably repeat over and over (and over!). Be prepared to answer questions and have general/theoretical conversations. Always share WHY this issue matters.

#### Gather Support

A good advocate takes initiative by engaging legislators and asking them to support our bill. You want to encourage others to join in supporting legislation that makes 529 and ABLE policies work better for all. Once they are on-board, keep in contact. Update partners regularly and engage them as often as possible.

#### Speak to Members of Congress

Speaking with Members of Congress is an opportunity to engage and provide a more personable ask. Before you do, first understand the legislator's committee assignments, political affiliation, and any leadership position. It's generally safe to assume a congressional

office (legislator and staff) have no prior knowledge of a specific bill we might raise and minimal experience with our issues as a whole.

Below are a few resources to help get in contact with Members of Congress.

- Who to contact at the Federal Level: House of Representatives (“Congressman/woman/person”), Senate (“Senator”), their staff (Chief of Staff, Legislative Director, Legislative Assistant, Legislative Aid, Staff Assistant, Committee Staff, District Staff), Federal Agencies (Political Appointees, Career Staff)
- How to find your legislators: [house.gov](http://house.gov), [senate.gov](http://senate.gov)

### **Call**

Calling is an efficient way to get your message across, even if you don’t speak to them. Phone numbers of senators and representatives are available on their websites. It is permissible to call your Member of Congress’s Washington, DC office and ask for the contact info of relevant staff.

### **Schedule a Meeting**

Meeting your Members of Congress in person or virtually is an effective way to influence them and their decisions. Steps include:

- Request a meeting—below is a sample Congressional meeting request email
- Research your Member of Congress
- Rehearse your “ask” or “elevator pitch”
- Prepare documents to leave behind
- Come prepared by bringing business cards, one-pagers, a notebook and pen; and make sure to dress professionally
- If the meeting is virtual, make sure to keep track of time to ensure you deliver your message

### **Attend a Town Hall Meeting**

Attending town hall meetings are an opportunity to ask questions and demonstrate your commitment. It’s important to come prepared with questions, make a point of talking with the Members of Congress or their staff at the meeting, take notes during and follow up afterwards.

Learn about upcoming constituent events by visiting the websites of your Members of Congress, calling the local district offices or viewing the [Congressional Calendar](#) and [Congress Days in Session](#)

### **Write a Letter or Email**

Writing a letter and emailing are other effective ways to communicate your concerns. Remember to keep your message clear and short, introduce yourself and your credentials, use specific examples, suggest recommendations and thank them.

- Below is a sample Congressional letter
- Standard staff email format: [first.last@mail.house.gov](mailto:first.last@mail.house.gov); [first\\_last@senatorsname.senate.gov](mailto:first_last@senatorsname.senate.gov)  
Example: [andrea.hart@mail.house.gov](mailto:andrea.hart@mail.house.gov); [andrea\\_hart@warner.senate.gov](mailto:andrea_hart@warner.senate.gov)

\*Note there are some exceptions.

## **Build Relationships**

How to share information and stories about your state's 529 plan(s).

Over time, you will learn that some aspects of your initiative/pitch will resonate better with certain offices. It's important to always draw the conversation about how this policy helps the legislator's state and district. Monitoring your legislator's social media accounts or email newsletters will help you learn what issues they care about the most.

## **Follow Up**

Always follow up! You should thank the staffer for their time and share electronic copies of the materials passed around at the meeting (one-pager, letters, op-eds, bill text). Remind them that we need their support.

## **Support Federal Initiatives**

Ongoing outreach via introductory meetings, emails, and social media will help you build rapport with legislators or their staff. When a specific bill is introduced, being considered by committee, or voted on by the full chamber, it's imperative that we've already created a network of support among legislators and their staff. If a vote is scheduled, we will use coordinated calls, emails and on-the-record letters to make sure staff knows that the time is NOW to make something happen on behalf of their constituents.

Ongoing outreach can include communication with the office using letters of support, meetings or calls into the office on topics of importance.

## **Track Legislation**

There are a variety of tracking services that you can sign up for, or look to NAST and CSPN committee leaders for guidance on when to engage.

## **Mistakes to Avoid**

- Don't speak on behalf of your state's officials or another stakeholder unless you've confirmed they want to be spoken for. Some states have rules on how to talk to the federal government.
- Don't expect every staffer or legislator to do what we want. They have their own priorities—it's our job to educate them and show them how support would benefit their constituents. Once they go on record with a Yes vote or as a cosponsor, it's on the books and they can be held to that stance, so they don't take it lightly.
- Don't skip over the basics. It's worth it to spend time on high-level topics ("what is a 529 account") and you will probably need to repeat yourself on anything that was said via email or at some point in the past.
- Do NOT raise conversation about campaigns, races, the "other" party, political giving, or the President.

## **What to Expect**

### **A Typical Hill Meeting**

You should request a meeting in advance via email and ask for the legislator or a relevant staff member to be present (the Member may only come by for a handshake or not at all). Share bill

text or the bill number in the meeting request or meeting confirmation. Plan to arrive at least 15 minutes early (virtual meetings: 5 minutes early). You should plan your visits with sufficient buffer time between each to ensure that you have enough time to go from one visit to another.

### Running a Hill Meeting

- Introductions (ideally each visitor should introduce themselves unless there is a larger group ~6+).
- Introduce specific topics for the office’s consideration and explain our “ask.”
- Explain the most important aspects of the issue and **say how the member’s district is affected.**
- Share relevant supporting documents and mention our coalition of stakeholders (e-copies for virtual).
- Conclude by repeating our “ask.” Example “It would mean a lot to have Congressman X as a cosponsor.” Do not expect an answer beyond “we’ll take a look.”
- Avoid “talking at” the staffer. **Speak slowly and allow for questions.** It is normal to not have every answer on-the-spot—be prepared to check-in with your CSPN colleagues or do further research afterward.
- Collect the staffer’s business card and plan to follow up.

### EXAMPLE: The ABLE Age Adjustment Act

- **Policy Message:** “Thanks to federal legislation in 2014, the Achieving a Better Life Experience (ABLE) Act, our state has worked to set up [insert number] ABLE accounts for individuals with disabilities, including veterans, first responders, students, citizens living in group homes, and those who want to work and build savings without hindering their access to critical means-tested benefits. A revision to the ABLE Act’s age of disability onset from 26 to 46—would enable [insert number] more [state name] to reap the unique benefits of ABLE accounts and secure their financial future.” \*If the member voted for the ABLE Act, say THANK YOU.
- **Ask:** “We need your support as a (new or renewing) cosponsor of the ABLE Age Adjustment Act.”
- **Support:** Our coalition includes the Wounded Warrior Project and other veterans’ groups, as well as national disability advocacy groups, state disability law nonprofits, anti-poverty researchers, and others. These groups, in addition to state administrators, support the passage of the ABLE Age Adjustment Act.
- **Who to Contact:** Members of the tax committees—the Senate Finance and House Ways & Means committees must vote on this bill first. It’s important that each committee member hear from us individually and as a group. Other relevant committees to target are Veterans Affairs and the Senate Special Committee on Aging.
- **Prepare to Share:** Bill information—bill number, a copy of the bill<sup>1</sup>, who is in our coalition, who has benefited from ABLE, how we get the word out about ABLE accounts, feedback from account holders, and how many more of the legislator’s constituents could potentially benefit.

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<sup>1</sup> <https://www.congress.gov/117/bills/hr1219/BILLS-117hr1219ih.pdf>;  
<https://www.congress.gov/117/bills/s331/BILLS-117s331is.pdf>

- **Why this Matters:** Disabled Americans often live in constant financial uncertainty because of fewer employment opportunities, high costs of disability-related equipment and care, and a rigid federal benefits program. Congress recognized how valuable a stable, tax-advantaged savings account is for these Americans, and the effects of the ABLE Act are starting to take shape. Allowing additional individuals—who are already considered disabled under the Social Security criteria—to be eligible to set up an ABLE account means they, too, can Achieve a Better Life Experience.

## Samples for Reference Only

### Sample Meeting Request

Good afternoon Josh,

My name is Andrea Hart and I serve as Associate Counsel for Virginia529. As a member of the National Association of State Treasurers (NAST) College Savings Plan Network (CSPN), Virginia529 joins CSPN member-states that operate tax-advantaged Achieving a Better Life Experience (ABLE) savings account programs for Americans with disabilities. Since the ABLE Act was passed in 2014, ABLE programs have helped Americans with disabilities save for qualified disability expenses without jeopardizing their eligibility for certain government benefits.

Members of NAST will be in Washington next month to discuss our legislative priorities, including the ABLE Age Adjustment (AAA) Act (S331), introduced by Senator Bob Casey and assigned to the Finance Committee. Under current law, only individuals who have a disability with an age of onset prior to 26 are eligible to open an ABLE account. The AAA Act expands ABLE account eligibility by increasing the disability age of onset threshold from 26 to 46 years old. The impact of this bill would be significant—allowing up to 8 million more Americans to open an ABLE account, and ensuring ABLE programs are self-sustaining at the state level. A broad coalition of stakeholders support passing the AAA Act, including disability and veterans' advocacy groups such as the Wounded Warrior Project, the United Spinal Association, and the Brain Injury Association, among others.

We're planning to be on the Hill Tuesday, March 15 and would like to meet with you to discuss the bill and request that Senator Scott consider cosponsoring. We have open availability in the afternoon, but also have some availability in the morning if needed. Representatives from the veterans and/or disability advocacy organizations will likely join as well, schedules permitting. As an alternative, we are happy to meet virtually at your convenience.

Thanks for your consideration and I look forward to working with you on this. Please feel free to reach me by email or mobile below.

## Sample Congressional Letter

### **Subject: More Funds Needed for Higher Education COVID-19 Relief**

Dear Senator [insert name],

My name is [insert your name] and I am the [insert title] at [insert institution]. I am writing today to request that you support the inclusion of additional funding for higher education in the next COVID-19 response legislation.

I appreciate your support of the CARES Act and the \$14 billion it provided to higher education institutions and students, including the [insert total allocation amount] received by [insert your institution name]. While the CARES Act funds were greatly impactful for our students, tremendous need still remains. Congress has the ability to help meet these needs in the next COVID-19 legislative package, but unfortunately, current proposals do not include sufficient funding for higher education. The HEALS Act introduced in the Senate on July 27 provides about \$29 billion for higher education, and the HEROES Act approved by the House in May provided \$37 billion. Both of these amounts fall far short of what is needed by students and institutions.

Estimates suggest that students and institutions will need at least \$120.4 billion to cover the costs of safely reopening, lost revenue, and emergency financial aid in the coming year. That amount will still not meet all students' needs or make colleges and universities whole for the substantial losses and expenditures they have had to shoulder, but it will provide a lifeline for students, families, and schools struggling to survive this national emergency.

Our \$120.4 billion request includes an estimate that students will have at least \$12 billion in new, unmet financial need during the upcoming school year, a number that will only grow as unemployment continues to rise and the pandemic's economic impact is more fully realized. Students, especially rural and/or low-income, need greater support than ever to continue or start their college education, as the economic downturn has resulted in soaring unemployment and left millions more families struggling financially. Students and their families need help investing in themselves by accessing higher education, and Congress can make sure that happens by increasing the emergency funding included in the next bill.

I urge you to support the inclusion of sufficient additional funding for higher education in the next COVID-19 legislative package to ensure that our nation's students have the necessary support to enroll and succeed in college, and our institutions have adequate resources to continue providing health care, conducting medical research, and supporting their local economies.

I am happy to discuss this issue further and answer any questions you might have. Thank you again for your support of [insert state] students and institutions.

Sincerely,

[Insert your name and contact information]