Council on Foundations

Shared purpose. Collective voice. Greater impact.

Planning Your Meeting

Prior to Meeting

- It is helpful to know the backgrounds and priorities of the individuals you are meeting. Often, a Member of Congress or someone on their staff will have a direct connection to an issue related to the foundation's work.
- Develop a roadmap or general outline for the meeting, however, be aware that the senator or representative, or staff may guide the direction of the meeting.
- The goal of the meeting is to build or maintain a relationship with your elected officials. They need to understand your work and how your foundation is supporting the communities you both serve. Educating policymakers on what you do, and how that could be enhanced or restricted by changes in tax policy, is especially important this year as Congress works to pass wide-reaching tax legislation before the Tax Cuts and Jobs Act expires.

What to Bring

- Information about your foundation, including stories or data on grantmaking that aligns with priorities for that congressional office.
- One pages or fact sheets on relevant issues, including any from the Council on upcoming tax issues.
- Business cards.
- Something to write on and something to write with.

What to Expect

- Senators and representatives generally maximize their time at home to be able to do as many meetings and site visits as possible. Avoid disrupting their tightly scheduled day by arriving early or being ready if they are coming to you.
- While meetings with congressional staff can sometimes be informal back at home, it is best to always dress professionally.
- Feel free to refer to your notes when you need, and make note of anything you'd like to include in follow-up.
- Note: While congressional staff may allow you to lead the conversation, Members of Congress will likely lead parts of the conversation, particularly if you raise any issues they consider priorities. While it can be helpful to map out how you want to meeting to go so you can highlight your most important points, it's also important to maintain flexibility.

Follow Up

- After the meeting, send a follow-up email to your staff contact. Share your appreciation for their time and interest, and include attachments of any printed materials you brought to the meeting. It is also helpful to add any asks or highlights from your meeting.
- Consider inviting the senator or representative and/or their staff to visit a project or grantee, or another kind of site visit to continue your conversation and build relationships.

Draft Meeting Agenda

1. Who are you?

- Everyone briefly introduces themselves.
- The last person should also provide a brief introduction about your foundation. Think of this as your elevator pitch about all the work your foundation supports.
- If the Member or their staff has attended events hosted by your foundation or has publicly supported any of your foundation's initiatives, thank them for their attendance and/ or support.
- If you have an existing relationship or intersect with the Member in some other way, highlight that here.

2. Tell your story.

- As Congress considers a tax bill, it is important policymakers and staff understand how you are supporting the community and local needs. Ensure your story describes the work your foundation does and how you do it, demonstrates why it is important, and how it positively impacts communities you serve.
- Consider choosing one or two specific initiatives or projects your foundation engaged in recently. Focus on areas of work that intersect with the Member of Congress's committee or legislative priorities.
    - What existing needs did the initiative address?
    - How did the initiative address those needs?
    - What giving tools (e.g. donor-advised funds, giving circles, scholarships) were used in this initiative?
    - What partners or local organizations did you work with?
    - What was the impact?
    - What does the future look like? What challenges exist that the Congressional office can help address?
- Numbers can be important, and you should have key data points to demonstrate impact…
- …But the narrative you share is what policymakers and staffers will remember. Don't be afraid to tug on heart strings!

3. Ask questions.

- Ask if the office has any questions.
    - The Member or their staff may ask questions along the way, but if not, see if they have any at the end.

    - If you don't know the answer to a question from the member or staff, that's okay. Offer to find the answer and follow up with the appropriate staffer.
- As Congress works on the tax bill, consider asking about the Member of Congress's priorities and what issues their colleagues are prioritizing, particularly with respect to foundations and the nonprofit sector.
- Consider asking what the Member's priorities are for the rest of the year. If there are areas where you might collaborate, offer yourself up to connect with their staff.
- If the moment arises, consider offering the policymaker and/or staff member to visit a project or grantee you've supported that demonstrates the local value of philanthropy.