



# A Toolkit for State Captains

**ORGANIZING YOUR STATE'S  
ADVOCACY ACTIVITIES AT THE 2017  
ALLIANCE CAPITOL HILL DAY**



National Alliance to  
**END HOMELESSNESS**

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## WELCOME AND INTRODUCTION

Dear State Captains and Capitol Hill Day Participants,

On behalf of the National Alliance to End Homelessness, I would like to thank you for your interest in Capitol Hill Day. If you are reading this, you have probably volunteered to lead your state's advocacy efforts at this year's Capitol Hill Day – thank you!

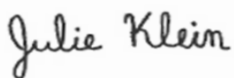
This toolkit is meant to provide a detailed account of your efforts around organizing your fellow participants and organizing congressional meetings for Hill Day, held this year on Wednesday, July 19. Those that are new to their State Captain roles will find many useful pieces of information and detailed instructions on how to organize your state participants, schedule congressional meetings, conduct successful meetings, and conduct successful follow up efforts. Veteran State Captains may find the following information useful to share with participants, or as helpful reminders of the tasks at hand. We encourage Veteran State Captains to particularly reference updates to the checklist and Appendices A and B.

It is important to remember that this toolkit is meant to serve as a guide – it is designed so you may follow it precisely or use it to enhance your own efforts. The timeline on the last page should serve as a good indicator for when certain tasks should be completed and when to touch base with your congressional offices and Alliance staff.

Remember, the Alliance is here to assist you every step of the way. You can feel free to reach out to myself ([jklein@naeh.org](mailto:jklein@naeh.org)), Jared Thompson ([jthompson@naeh.org](mailto:jthompson@naeh.org)), or Carter Hancock (our Federal Advocacy Intern helping us out with Hill Day, with whom you will be working closely, [chancock@naeh.org](mailto:chancock@naeh.org)) at any time throughout the process to seek guidance, ask for help, or just provide updates.

We thank you again for your willingness to take on this important role at the Alliance's conference. We understand that your role as a State Captain and your advocacy efforts in general are often in addition to your full-time roles working to prevent and end homelessness, and we could not be more grateful for your time and dedication. We all look forward to working with you in the coming weeks and to seeing you in July!

Sincerely,



Julie Klein  
National Alliance to End Homelessness

# OVERVIEW OF CAPITOL HILL DAY

## WHAT IS 'CAPITOL HILL DAY?'

Capitol Hill Day is held in conjunction with the Alliance's annual *National Conference on Ending Homelessness*, which takes place in July. This event allows conference participants to take advantage of the opportunity of being in Washington, DC through meeting with their U.S. Senators and Representatives and their respective offices. Face-to-face time with Members of Congress and their staff is one of the most important ways to take part in federal advocacy – a critical component to your work in ending homelessness. The goals of such meetings are to:

- Establish/build relationships with your congressional offices;
- Educate your senators and representatives on your success and progress at home; and
- Encourage them to work in support of policy initiatives to eliminate homelessness.

State Captains play the most critical role in ensuring that Hill Day is as productive as possible.

### **What role do State Captains play in Capitol Hill Day?**

Each year, the Alliance recruits new and returning State Captains to lead and coordinate a state's advocacy activities during the conference. We assist State Captains with anything they need in order to (a) organize other conference participants from their state to join them in Hill Day; (b) schedule congressional meetings and liaise with congressional offices; (c) ensure that everyone is prepared with talking points, an agenda, and materials for the meetings; and (d) conduct effective meeting follow-up with congressional offices. This year we are also asking State Captains to let conference attendees from their state know about the optional (but encouraged!) advocacy opportunity of organizing Community Sign On Letters to bring to the Hill meetings.

If you are not your state's State Captain, you can find out who they are by visiting the [Capitol Hill Day 2017 webpage](#) and clicking the "List of State Captains with contact information" resource. You can also volunteer to play that role by contacting Julie Klein (202-942-8281, [jklein@naeh.org](mailto:jklein@naeh.org)) or Jared Thompson (202-942-8294, [jthompson@naeh.org](mailto:jthompson@naeh.org)). If you are not interested in participating as a State Captain but would like to participate in Hill Day, let your State Captain know that you would like to be involved in your state's Capitol Hill Day activities. Plan on staying in Washington, DC through the late afternoon of July 19 so you can make the most of your meetings!

### **As State Captain, what do I do?**

This toolkit provides step-by-step information – complete with a timeline, checklist, and sample materials – to help you be most effective in organizing your state's advocacy efforts for Capitol Hill Day, whether you have made 50 visits to your congressional delegation or whether this is your first time. Don't miss the opportunity to meet with your legislators while you are in the nation's capital!

### **Will the Alliance help?**

The Alliance will help you at every step of the way as you organize participants from your state and begin to plan and execute congressional meetings. The Alliance has numerous tools to make your job as easy as possible, including this toolkit. In addition, the chapter titled "[Conducting Successful Congressional Meetings](#)" from the Alliance's [Advocacy Toolkit](#) will be extremely helpful as you and your fellow constituents move forward in the planning process. Many of the tips and sample materials found here, and much more, can be found in the Advocacy Toolkit. You can reach out to Julie Klein ([jklein@naeh.org](mailto:jklein@naeh.org)) or Carter Hancock ([chancock@naeh.org](mailto:chancock@naeh.org)) at any point in this process for assistance and guidance.

## **STATE CAPTAIN ACTIVITIES CHECKLIST**

↳ FOR CHECKLIST BY TIMELINE, SEE APPENDIX G

### **SETTING UP CONGRESSIONAL VISITS**

- ☐ **Ask other conference attendees from your state to participate in Hill Day meetings and to mobilize their community partners to sign on to letters give to their congressional offices during the meetings.**

↳ SAMPLE "NEW PARTICIPANT OUTREACH" LETTER AVAILABLE (SEE APPENDIX A)

↳ SAMPLE "COMMUNITY SIGN ON" LETTER AVAILABLE (SEE APPENDIX B)

Having many participants from your state is a great way to demonstrate that the issue is important to a large number of constituents. The Alliance will provide State Captains with lists of registrants from their states. You can use these lists to reach out to other individuals who might be interested in: participating in Hill Day; mobilizing their community to sign on to [letters](#) to send to their congressional offices and bring to Hill Day; and/or hosting their Representative or Senator for a tour of their homeless assistance program during the August recess.

- ☐ **Send the meeting request form to the DC scheduler.**

↳ SAMPLE "MEETING REQUEST FORM" AVAILABLE (SEE APPENDIX C)

- The scheduler is the staff person who is responsible for the senator's or representative's schedule.
- All communications should be faxed or emailed to the scheduler in the DC congressional office (do not send by regular mail). You should copy the staff person in the DC office who works on the relevant issue (likely housing and homelessness issues) and any staff with whom you have a relationship.
- The Alliance can help you find any needed information on your congressional offices.

- **Make sure to follow up on the meeting request regularly!**

☐ **Ask your colleagues (and fellow conference participants) to fax/email letters to reinforce the request for an in-person meeting, and communicate the policy issue you wish to discuss.**

↳ SAMPLE "LETTER OF SUPPORT" AVAILABLE (SEE APPENDIX D)

- The more people who communicate their desire to meet with the senator/representative in person, the more likely he/she is to attend the meeting in DC or agree to find a time in August to tour a local homeless assistance program.
- Likewise, the more constituents that raise the policy issue, the more likely it is that the congressional office will consider it before your meeting (this is discussed in greater detail below).

☐ **Call and/or email the scheduler to confirm the meeting before coming to DC.**

- It is not likely you will get a commitment for a face-to-face meeting with your Member of Congress right away. Be persistent; keep calling and emailing as needed.
- If your senator or representative is not available to meet with you, typically a meeting will be set up with the appropriate staff person (usually the staff person who works on housing and homeless issues). Not to worry - congressional staff are CRITICAL in making policy decisions and are people with whom you need a relationship to move your policy agenda forward.
- After a meeting is set up, call to confirm with whom you are meeting, the meeting time, and the location. Members of Congress are very busy, so it is important to keep your meeting on the scheduler's radar. This will make it less likely that they schedule a conflicting appointment. (Yes, unfortunately this does sometimes happen, even after you have set up a meeting.)
- Make sure to give the scheduler or the appropriate staff person an estimate of how large your group will be – even if it is only a quick email just a few hours before the meeting occurs.

☐ **Follow up with the staff person who will be attending the meeting, regardless of whether or not you have an in-person meeting with your senator/representative.**

- To heighten the effectiveness of your meetings, send information about the policy issue and make your policy request to the staff person who is working on the issue prior to your meeting in DC. This gives staff a chance to work with the senator or representative to think about your request and formulate a response by the time of the meeting.

## DO YOUR HOMEWORK

☐ **Decide on policy priorities - one or two things you want to ask the senator or representative to do (i.e. support a specific funding level for a specific program).**

- If you bring a laundry list of concerns to your meeting, it will dilute the importance of ALL the issues discussed. Focus on one or two policy issues and stick with them throughout your conversation.
- The Alliance will designate Federal Policy Priorities for Capitol Hill Day. These are issues on which we can have the most impact considering the congressional calendar and the current status of bills. The Hill Day Packet at the conference will include the Policy Priorities, along with a targeted request and talking points for each. This information will also be posted on the [Capitol Hill Day page](#) of the Alliance's website before the conference and upon your request.
- Participate in a conference call with Alliance staff and State Captains from across the country to help you understand the Alliance's policy priorities and cover other pertinent details and next steps.

☐ **Find something for which to thank your Member. Investigate whether or not your senator/representative has been, or is likely to be, supportive of the issue.**

- The Alliance can assist you on finding information about your Members' past support of issues related to housing and homelessness. Try to find areas of agreement, even if they are few. Your ability to influence your senators and representatives will be due in part to the mutual respect you develop.
- Always try to thank him or her for something specific they have done related to the policy issue you will be discussing.
- You can [click here](#) to see if your Representative signed on to a Dear Colleague letter in support of the Administration's proposed funding level for the McKinney-Vento Homeless Assistance Grants programs, and [click here](#) to see if your Senators signed on to a Dear Colleague letter in support of the Administration's proposed funding levels for McKinney and the Section 8 Tenant-Based Rental Assistance program in FY 2018.

☐ **Find out which positions in Congress your senators and representatives hold and what (if any) influence that role brings to the issue.**

- It is important to know if your member holds a leadership role and if they sit on a committee that has jurisdiction over any of the policy issues. This will impact your policy request. Important committees include the Appropriations Committee (House and Senate), among others. The Alliance will be working with you to make these determinations. Please reference the "congressional target sheet" Julie or Carter send you as a helpful starting point.

☐ **Gather materials with local information to help build a strong argument.**

- Although the Alliance will prepare you with “leave behind” materials on federal policy priorities nationally, congressional offices are most interested in how policy issues impact the people in their district and state (you!). Bring materials with local information that briefly describes what your organization has accomplished, shares outcome data, and concretely explains why your program works and how the policy issues directly affect peoples’ lives. Where possible, tailor these materials to the Member’s interests. The [Community Sign-On Letter](#) is one example of a great leave-behind.

## **PREPARING ATTENDEES FOR HILL VISITS (BEFORE THE CONFERENCE)**

☐ **Ask other conference attendees from your state to participate in the meetings.**

- Bringing a varied group of stakeholders is a good way to demonstrate widespread support on the issue. When recruiting people to participate in congressional meetings, make an effort to involve people who you would not necessarily expect to be advocates of the issues and/or people representing local and state government, someone who is/was homeless, or someone who has a relationship with the senator/representative.
- Some people might not be able to attend Hill Day but want to participate in federal advocacy. Regardless of whether they can attend, you should ask conference attendees (or other advocates you know) from your state if they might be willing to host a Member of Congress for a site visit of their program this August.
- In addition, some states prefer to have a conference call prior to arriving in DC in order to informally meet others and decide policy priorities and other logistics in advance.

☐ **Organize “leave-behinds” for each office.**

- This is background information that includes both the materials you brought from home (mentioned previously), and federal policy information about the issues you choose to discuss in the meeting (the Alliance will have information on the federal policy issues available at the conference). It is very important to provide participants from your state with and/or ask them to bring local information on homelessness in Members’ states/districts!

## **AT THE CONFERENCE**

☐ **Visit the Hill Day Table in the Advocacy Center for a list of State Captains and Hill Day State Prep Sessions, a Hill Day Information Packet, and answers to your questions. At this table, Julie, Jared, and Carter will also give you instructions for delivering pop-up**



**houses to all congressional offices for your state. Or, just stop by to say hi!**

**Attend related workshops geared toward productive advocacy.**

These workshops will address strategies for impacting Members of Congress to support your work in ending homelessness. Workshop speakers will engage the audience in discussion on building relationships with Members of Congress, messaging that is working in the current environment, forging connections in your communities, and the latest on the federal budget as it relates to homelessness.

- Recommended sessions include Workshop 1.03 Capitol Hill Day: Make Your Voice Heard (Monday afternoon); Spotlight 1.03 Impacting the Federal Budget: Progress and Challenges (Monday afternoon); and Workshop 5.12 Building a Movement: Why Grassroots Organizing Matters Locally and How To Do It (Wednesday morning).
- For the full conference agenda, click [here](#).

**Attend the State Captain Meeting**

- The Alliance will host a meeting for all State Captains at the beginning of the conference to coordinate all last-minute needs and discuss last-minute policy updates and messaging. This meeting will take place Tuesday, July 18, 8:00-8:45 am EST in room Virginia A & B. Stop by the Hill Day Table in the Advocacy Center for further information.

**Lead State Prep Session to Prepare Participants from Your State**

- The Alliance has set aside blocks of time and rooms for you to meet with others from your state to prepare for congressional visits during State Prep Sessions. Julie Klein ([jklein@naeh.org](mailto:jklein@naeh.org)) or Carter Hancock ([chancock@naeh.org](mailto:chancock@naeh.org)) from the Alliance will be in touch to let you know when your state's State Prep Session is. If you have a conflict, you can let us know then and we will try to find another time.
- Visit the Hill Day Table in the Advocacy Center at the conference to reference the schedule of State Prep Session times. Make sure your state decides who will attend each meeting and has a plan to travel to the Hill for each. Also make sure that there is a plan to deliver a pop-up house to each office you are meeting with, and to each of your state's congressional offices that you did not set up meetings with.

**Create a meeting agenda during the Hill Day Prep Session.**

👉 SAMPLE "MEETING AGENDA WORKSHEET" AVAILABLE (SEE APPENDIX E)

- You should come to an agreement on the one or two issues to be discussed in each meeting.
- The "Meeting Agenda Worksheet" is very detailed. Plan what each person is going to say. Run through the agenda and even role play the meeting a few times. Everyone should feel comfortable and

prepared for possible questions and responses from the Member or staff person.

- It is *crucial* that you run a “tight” meeting and **stay on focus with the agenda**. Members of Congress and their staff are very busy and sometimes are pulled away from meetings after only a few minutes, so get right to the point.
- Make sure that each meeting has a point person/leader to ensure smooth facilitation.

☐ **Prioritize those with the experience of homelessness to participate.**

↳ SAMPLE “TELLING YOUR STORY” GUIDELINES AVAILABLE (SEE APPENDIX F)

- Those who have experienced homelessness have powerful stories to tell. Elected officials and others say, time and time again, that it is often the story of a formerly homeless person that is the most effective part of an event or a Hill visit.
- Ideally, the person will tell a story of success and talk about a program that has helped end his or her episode of homelessness and how. Preparation is important, just as it is for all meeting participants. See “Telling Your Story: Advocate in Your Own Words” for helpful hints on how to make this part of the Hill Visit most effective.

☐ **Attend Hill Meetings.**

- Attend the Hill Meetings you scheduled. Make sure to raise the Alliance’s top policy priorities during the meeting, and explain how they relate to ending homelessness in your community. Give the office a “pop-up house” during the meeting! (You will receive these when you check-in for Hill Day at the conference hotel).

☐ **Deliver Pop-Up Houses to Offices without Meetings Scheduled.**

- Deliver pop-up houses to the congressional offices in your state that you do not have planned meetings with. If you are not able to deliver these, make sure to assign someone else in your state to do so.

☐ **Report on your meetings at Wednesday afternoon’s “Report Back Session” from 2:00-6:00 pm, which will likely take place at the conference hotel. This session is “rolling,” so come back whenever your meetings end.**

- We will be in touch with State Captains closer to the conference with the final location for this session.
- We want to hear about your success and help you with follow up to your meetings. If you cannot attend the Report Back Session, make sure that you turn in your form (which you can find in your Hill Day Packet) in the Advocacy Center, fax it to 202-638-4664, or email the information to Julie Klein ([jklein@naeh.org](mailto:jklein@naeh.org)).

## THINGS TO DO WHEN YOU GET HOME

### ☐ **Send a thank you letter.**

↳ SAMPLE "THANK YOU LETTER" AVAILABLE (SEE APPENDIX G)

- Restate your position and any agreements made during the meeting.
- Invite your Member of Congress to tour a program in their state or district in August.

### ☐ **Follow up with congressional staff on the policy request.**

- You do not want to let time spent on the Hill go to waste! It is rare that the senator, representative, or a staff person will have a definite answer regarding your request in the meeting, so it is critical to conduct follow up. Note: Make sure to ask in the meeting when and with whom you can follow up about the request.
- Call or email the correct staff person with any additional information that was requested. (If someone in the meeting asks about something you do not know, tell him or her that you will find out the answer and respond later. This is a great way to keep the lines of communication open.)

### ☐ **Arrange a site visit.**

↳ COMPLETE SITE VISIT TOOLKIT AVAILABLE [HERE](#) SHORTLY

#### **Pick 1 or 2 policy issues on which to focus.**

- If you try to address too many issues, the Member is less likely to remember any of them.
- Focus on the federal policy issues rather than the local policy issues. The Member can work to address federal policy, whereas he has little control over local policy.

#### **Get key stakeholders to send letters of support to urge the Member to come.**

- Because of their busy schedules, it can be difficult to convince Members of Congress to attend a site visit in person. More letters of support better your chances of convincing them to come.

#### **Tie what the Member is seeing and hearing to the policy issue.**

- Have a set agenda, and be sure all speakers know to make the connection between what they are showing the Member and the policy issue you wish to address.
- Prepare handouts about your program and the policy issue you wish to address that highlight the existing outcomes of your program.

#### **Find out when and with whom you can follow up.**

#### **Send a thank you note.**

- Be specific, and follow up on any commitments made during the site visit.

☐ **Participate in the Campaign for Housing and Community Development Funding (CHCDF)’s Housing Day of Action, “Our Homes, Our Voices,” by planning or participating in advocacy activities on July 29 or the week before or after.**

- Host your site visits (or in-district meetings) by August 4!
- You can also:
  - Plan or participate in a march or rally.
  - Hold a press conference.
  - Organize or participate in a call-in day or letter writing campaign.

*(More information and a website forthcoming!)*

☐ **Check the Alliance’s CQ advocacy website for current information about advocacy opportunities.**

- Monitor [this page](#) for current opportunities about what you can do to take action to make an impact on ending homelessness.

☐ **Continue to educate your congressional delegation by designing a year-long advocacy plan.**

- The Alliance’s [Advocacy Toolkit](#) has a section on developing and implementing a [Strategic Advocacy Plan](#) for your organization. It can be found on our website in the “Advocacy Tools” section.
- Our partners who have been successful in getting senators and representatives to work at moving their policy agendas forward are those who take opportunities throughout the year to engage elected officials in their work in ending homelessness. For example, in addition to hosting site visits of programs, they invite elected officials to local events, organize legislative briefings and breakfasts, and more.
- The Alliance is available to help you with anything your organization needs to implement any of these key strategies.

## APPENDICES

### APPENDIX A: SAMPLE NEW PARTICIPANT OUTREACH LETTER

*Please personalize all sections in red.*

Dear Friends,

I am a(n) (STATE) State Captain for the National Alliance to End Homelessness' *National Conference on Ending Homelessness* from July 17-19, in Washington, DC. **I am writing to encourage you to participate in this year's Capitol Hill Day with me,** which will be held in conjunction with the conference on July 19.

This is an opportunity for us to come together to represent our state in advancing ending homelessness as a federal priority. This is increasingly important in the current partisan political and conservative budget environment. Together, conference attendees from our state - service providers, consumers, previously homeless individuals, homeless advocates, city or state employees, and other key stakeholders - can convince Members of Congress to provide improved and increased resources for our efforts to prevent and end homelessness.

As State Captain, I will coordinate congressional visits for participants from across the state. The more homeless advocates from (STATE) that join our Capitol Hill visits, the more pressure we can place on our congressional offices to support federal initiatives targeted at ending homelessness. This is an opportunity for us to educate our state's federal policymakers about the need to support people who are often overlooked by Congress.

**Please let me know if you are interested in participating in this year's Capitol Hill Day.** Additional information about Capitol Hill Day is available at <http://help.endhomelessness.org/events/41#/events/41/past-events>.

**The Alliance is also asking Capitol Hill Day attendees to consider asking your community partners to sign on to a letter to your Members of Congress updating them on homelessness in their jurisdictions** and explaining why increased federal funding in FY 18 is important to your community's efforts to end homelessness. These partners should ideally include local and state elected officials; other public officials; faith-based partners; private sector partners; and service providers. You can find a draft template of this letter to tailor to your community's experience with homelessness and circulate for sign on's [here](#). You can also contact Julie Klein at the Alliance ([jklein@naeh.org](mailto:jklein@naeh.org)) to see if anyone else in your congressional district is already organizing a letter that you could help with to avoid duplication. If you start your own letter, make sure to enter your information into the letters database using [this link](#). Once your letter is complete, send it to the housing staffer in your Members' offices, forward it

to Julie at the Alliance, and print copies to bring to Hill Day meetings. For more information, see the Alliance's [CQ advocacy page](#).

**Finally, please also let me know if you are willing to host a Member of Congress for a site visit to tour your program during the August recess** so that I can connect you with their scheduler and materials from the Alliance to help you plan this.

I look forward to hearing from you and seeing you in July at the conference. Please do not hesitate to let me know if you have any questions.

Thanks,  
([NAME and EMAIL](#))

## APPENDIX B: SAMPLE COMMUNITY SIGN ON LETTER

*Please tailor all sections in **red** to personalize the letter for your state or district.*

Dear **Senator/Rep. X**,

We are reaching out on behalf of ("**jurisdiction name here**") to express our concern about the issue of homelessness in ("**X state**" for Senators/ "**your district**" for Representatives). On any given night in ("**community**"), ("**most recent overall homelessness PIT count #**") people experience homelessness. This includes vulnerable members of our community such as veterans, families with children, chronically homeless people with disabilities, and unaccompanied youth. (**If any of these populations is a particular concern for your community, explain here**).

While an increasing gap between incomes and rents for many of the most vulnerable members of our community continues to cause people to become homeless, our community has recently (**if #'s decreasing: "made progress in reducing the number of people who experience homelessness"/if numbers steady or increasing: "improved our response to homelessness"**). We have accomplished this by shifting our approaches to more effective Housing First interventions which have been supported and incentivized by Congress and HUD.

(**Share how increasing your rapid re-housing capacity has made your community's efforts more efficient, how effective permanent supportive housing has been at ending homelessness for the most vulnerable people in your community, or innovative examples of leveraging federal funding with private and city/county/state dollars.**)

This is a broad community effort. (**Share here the involvement of private sector and faith-based partners and/or local government in your work to end homelessness**). However, federal funding provided by HUD's McKinney-Vento Homeless Assistance Grants program and other targeted homeless assistance programs is essential in our fight against homelessness, and without funding and support from Congress to date, much of our progress would not have been possible. (**Explain that these other stakeholders would not have invested without the federal leadership**).

It is rare that we understand the solution and have the tools to effectively solve a seemingly intractable social problem. Allowing people to continue to struggle to survive on the streets or to cycle through crisis systems is immoral and expensive. We have greatly appreciated the federal funding provided to allow ("**community**") to effectively respond to the crisis of homelessness, and are particularly thankful for the \$133 million increase to McKinney in the Fiscal Year 2017 spending bill. However, our work is not done, and we need your support to continue our progress. Current federal funding levels, even when strategically leveraged locally, will not be sufficient for us to end homelessness in our community. There is simply not nearly

enough local or private funding to fill the gap and address the full scope of the community's need.

A \$217 million increase to \$2.6 billion in FY 18 would house approximately 40,000 more people than last year nationally and allow (community) to (share how increased federal funding could help your community). **We urge you to fund the McKinney-Vento Homeless Assistance Grants program at least at \$2.6 billion in FY 2018.** We also hope you will be able to tour one of our homeless assistance programs and meet with community leaders during the August recess, and will follow up with your office about this. Thank you for your leadership and consideration of these requests.

Sincerely,

**Service Providers:**

**Local and State Elected Officials:**

**Public Officials:**

**Faith-based Partners:**

**Private Sector Partners:**



## APPENDIX C: SAMPLE MEETING REQUEST FORM

Please personalize all sections in *red*.

### PLACE ON YOUR LETTERHEAD

#### Attention Scheduler

TO: (SENATOR/REPRESENTATIVE)  
ATTN: (SCHEDULER)  
CC: (STAFF PERSON WHO WORKS ON RELEVANT POLICY ISSUES)  
FAX: (FAX NUMBER OF THE DC OFFICE)  
FROM: (YOUR NAME/ORGANIZATION)  
RE: VISIT FROM CONSTITUENTS  
DATE: (DATE)

Dear (SENATOR/REPRESENTATIVE X),

(TRY TO INCLUDE AN ESTIMATED NUMBER OF CONSTITUENTS AND/OR DESCRIBE WHO WILL BE COMING) will be in Washington, DC from July 17-19, for the *National Conference on Ending Homelessness*. We would like to meet with (SENATOR/REPRESENTATIVE X) and appropriate staff to discuss (INSERT POLICY ISSUE).

Preferably, we would like to schedule a time between 1:30 P.M. and 5 P.M. on Wednesday, July 19. I will call you to follow up in the next week to identify the best date and time for a meeting with the (SENATOR/CONGRESSPERSON). In the meantime, you can contact me at (INSERT PHONE NUMBER).

(BRIEFLY DISCUSS INFORMATION ABOUT WHAT IS GOING ON LOCALLY, YOUR PROGRAM, OR MORE INFORMATION ON THE ISSUE YOU WISH TO DISCUSS.)

Should July 17-19 not work for you to meet with our group, we hope to meet with your appropriate staff in DC, and to find a time that you can tour a homeless assistance program in your (DISTRICT FOR REPRESENTATIVES/STATE FOR SENATORS) in August to see firsthand the work (X COMMUNITY) is doing to end homelessness.

Thank you for your time. I look forward to the meeting in July.

Sincerely,  
(NAME/ORGANIZATION)

## APPENDIX D: SAMPLE LETTER OF SUPPORT

*Please personalize all sections in red. You can use this sample letter of support as a template to provide to other organizations and individuals in your community to send letters in support of your meeting request.*

### PLACE ON YOUR LETTERHEAD

The Honorable (FIRST AND LAST NAME OF MEMBER)  
U.S. SENATE / U.S. HOUSE OF REPRESENTATIVES  
Washington, DC (SENATE ZIP CODE IS 20510; HOUSE ZIP CODE IS 20515)  
Attn: Scheduler and (STAFF PERSON WHO WORKS ON RELEVANT POLICY ISSUE)  
FAX: (FAX NUMBER)

Dear (REPRESENTATIVE / SENATOR X),

I am writing to support the recent request you received from (NAME/ORGANIZATION) to attend a meeting with (TRY TO INCLUDE AN ESTIMATED NUMBER) of your constituents who will be in Washington, DC for the *National Conference on Ending Homelessness* from July 17-19.

The group would like to take this opportunity to thank you for (THANK HIM/HER FOR SOMETHING SPECIFIC OR GENERALLY FOR HIS/HER SUPPORT), demonstrate the success of local homelessness assistance programs, and discuss how we can continue to work together to advance (INCLUDE A SPECIFIC POLICY ISSUE).

(INCLUDE LOCAL INFORMATION ABOUT HOW THE POLICY ISSUE IS RELATED TO YOUR COMMUNITY'S PROGRESS. FOR EXAMPLE:

- YOUR PROGRAM'S ACCOMPLISHMENTS, HOW MANY PEOPLE YOU HAVE SERVED, HOW MANY PEOPLE HAVE BEEN RE-HOUSED;
- A STORY ABOUT SOMEONE'S HOMELESSNESS THAT WAS PREVENTED OR ENDED; OR
- INTERESTING PARTNERSHIPS.)

The group is looking forward to meeting with you in Washington. Should you be unable to meet during this time, we hope to schedule a site visit to tour a local homeless assistance program or meeting at your (NAME LOCALITY WITH THE MEMBER'S CLOSEST OFFICE) office in August. Thank you in advance for your consideration of this request. I look forward to continuing to work with you on this critical issue.

Sincerely,

(NAME/ORGANIZATION)

## APPENDIX E: MEETING AGENDA & WORKSHEET

Please personalize all sections in *red*. Below is a sample meeting agenda to help you think through the framework of your meetings with your senator(s) or representative(s). If more than one person attends, think about who will chair the meeting and who will cover each agenda item. Use the sample meeting agenda to help you fill in information on the meeting agenda worksheet.

### MEETING AGENDA

#### 1. Introductions (BRIEF)

- All attendees introduce themselves and their agency and say **one or two sentences** about their involvement with the issue of homelessness. If there are more than three people in the meeting, a previously designated chair might want to do the introductions.
- Mention any relationships you have with acquaintances of your senator or representative.

#### 2. Purpose of the meeting

- *We are here today to talk to you about the local progress being made in (CITY/STATE) to implement solutions to homelessness and how we can work together to advance our progress. Specifically, we ask that you work in support of (RELEVANT POLICY ISSUE).* Information about current policies is available on the Alliance's website. The Alliance can help you decide how your Member can have the most impact.

#### 3. Thank the senator/representative for something

- *We would like to take this opportunity to thank you and your staff for your dedication to improving policies that will allow us to better address homelessness in (COMMUNITY).*
- What is the senator's/representative's history of support on this issue?
  - Thank him/her for something specific. For example, co-sponsorship of or work to support legislation, voting to increase federal funding for key programs, or visiting your program recently.

#### 4. Tell local stories of personal and community-wide success

- Members are more likely to support your request when you can demonstrate how much you have accomplished with the resources that you have. This shows that you can put the resources to good use.
- Share any community or program-related outcome data. Describe what you do, and concretely explain why your program works. Relate the policy issues to your community's success.
- Tell the story of how you (or an individual/family you know) benefited from a local homeless assistance program.
- Discuss the involvement of interested partners in the community who have come together in your local movement to end homelessness (i.e.,

business owners, community organizations, local leaders/elected officials).

**5. Describe how this policy issue will impact homeless people and programs in your community**

- Discuss the number and types of individuals, families, or youth who would benefit from the policy, as well as how they would benefit.
- The Alliance can help you decide what to say if you are not sure.

**6. Make a SPECIFIC ask**

- *We ask that* (SENATOR/REPRESENTATIVE X) (i.e., support a specific funding level for a program in the appropriations process, send a letter, sign a congressional sign-on letter, co-sponsor legislation, etc.).

**7. Response from Member/staff**

- Think about what questions you expect the Member to ask based on past contact with him/her.
- If the meeting is with a staff person (not the Member), the staff person will have to ask his/her boss before giving you an answer. Ask when you can follow up with him/her.
- If the Member of Congress is there, you should ask, "Who on your staff can I follow up with?"
- If, in response to your specific ask, you get a ...
  - **Yes:** Say: "Wonderful!"
  - **Maybe:** Ask: "Is there any additional information I can provide to help you decide?"
  - **No:** Say: "Is there a reason why you will not do this? Is there any information I can provide that might address some of your concerns?" (This is an excellent opportunity to keep the lines of communication open).

**8. Closing**

- Summarize any commitments made by the Member/staff.
- Repeat any questions you need to answer in follow up that you couldn't answer in the meeting.
- Invite them to see a local program the next time they are at home.
- Thank them, and ask when and with whom you should follow up.

**Sample Talking Points: How Does this Policy Issue Impact Your Community?**

**General Talking Points**

- **STATEMENT OF CONCERN:**
  - Use local data to describe the scope of homelessness in your community.
- **STATEMENT OF THE VALUE:** Why does the policy issue matter?
  - *We use this critical funding to do* (X). Describe the success of local initiatives/programs.

- *With additional funding, our community would be able to do (X).*  
*(AND/OR) Without increased funding, we will not be able to do (X).*
- Explain how you are using CoC and ESG funds to implement best practices and the need for a continued, sufficient federal investment.
- **STATEMENT OF THE SOLUTION:**
  - Restate the policy request, and use the following talking points to describe how it impacts your community.

## MEETING AGENDA WORKSHEET

Meeting with \_\_\_\_\_

### 1. Purpose of the meeting

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Specifically we would like the senator / representative to:

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### 2. Introductions (BRIEF)

### 3. Thank you

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### 4. Tell stories of success

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**5. Describe how this policy issue will impact homeless people and programs in your community**

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**6. Make the ask**

We ask that Senator / Representative \_\_\_\_\_:

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**7. Response and Questions**

Think about what questions you expect the Member to have based on past support of specific issues or past contact with him/her.

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Think about how you will respond to questions the Member or staff might have.

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**8. Closing**

Thank you for

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Summarize any commitments made by the Member/congressional staff.

Repeat any questions you need to answer in follow up (that you could not answer in the meeting) and any additional information you need to provide.

## APPENDIX F: TELLING YOUR STORY

### Advocate in Your Own Words

Story telling is a powerful advocacy tool!

Whether you are homeless or have been homeless, you are a service provider, or you represent local government, telling your story makes homelessness and solutions to homelessness real. Stories leave lasting impressions and provide a perspective that is rarely heard by elected officials.

Policymakers are impressed by real-life examples of how federal policy impacts real people and individual and organizational successes.

### Tips for Effective Storytelling:

- **Who should tell stories?** Homeless or formerly homeless people, homeless service providers, and local government officials should all tell stories of success in ending homelessness.
- **Keep it personal!** You do not need to be a policy expert to impact public policy. Tell your own story of success and how a specific program or policy can help more people like you or people in your community.
- **Match the story with the policy issue.** For example, if your policy issue involves supportive housing, tell a story about how permanent supportive housing works and why supportive housing resources should be expanded.
- **Know your audience.** Stories should emphasize different things, depending on what the person you are talking to cares about. For example, if they have a history of supporting children's issues, then tell a story about how the policy impacted a family or a child.
- **Focus on success!** People are attracted to people and programs that succeed. Describe how you or a client moved beyond homelessness with the help of a local program. If you focus on difficulties or what you are unable to do, this often makes the program look inefficient or ineffective.
- **Describe your emotions.** Describe the impact this program or policy issue has had on your life.
- **Keep it local.** Relate your story to how the issue impacts your city and what your program would specifically do with additional resources (e.g. create 50 new units of permanent supportive housing).
- **Keep it short!**

## APPENDIX G: SAMPLE THANK YOU LETTER

Please personalize all sections in *red*. You can use this letter as a template for drafting your note of thanks for the congressional meeting.

### PLACE ON YOUR LETTERHEAD

(DATE)

The Honorable (FIRST AND LAST NAME OF MEMBER)  
U.S. SENATE / U.S. HOUSE OF REPRESENTATIVES  
Washington, DC (SENATE ZIP CODE IS 20510; HOUSE ZIP CODE IS 20515)  
Attn: Scheduler and (STAFF PERSON WHO WORKS ON RELEVANT POLICY  
ISSUE)  
FAX: (FAX NUMBER)

Dear (SENATOR/REPRESENTATIVE X),

I want to thank you for taking the time to meet with me while I was in Washington, DC last week. I greatly appreciate your efforts to advance federal policies that will allow communities like (CITY) to continue preventing and ending homelessness.

(RESTATE THE POLICY ISSUE.)

(SUMMARIZE ANY COMMITMENTS MADE. FOR EXAMPLE: STATE AN AGREEMENT YOU MADE TO SEND MORE INFORMATION, A COMMITMENT FROM THE MEMBER TO TAKE ANY SORT OF ACTION IN SUPPORT OF THE REQUEST, OR AN AGREEMENT THAT YOU MADE TO FOLLOW UP WITH HIS/HER OFFICE AT A PARTICULAR TIME.)

(I WOULD ALSO LIKE TO FOLLOW UP ON/EXTEND THE OFFER TO VISIT X PROGRAM IN AUGUST OR THE FALL. WE ARE CERTAINLY FLEXIBLE AND HOPE TO WORK WITH YOUR SCHEDULER TO FIND THE BEST DATE AND TIME FOR YOU TO SEE FIRSTHAND THE IMPORTANT WORK X PROGRAM IS DOING TO END HOMELESSNESS IN X COMMUNITY.)

Thank you for your consideration of this request. I look forward to continuing to work with you on this crucial initiative and welcome any requests for additional information.

Sincerely,

(NAME/ORGANIZATION)



## APPENDIX H: STATE CAPTAIN ACTIVITIES TIMELINE

Target Date for Completion	Activity	Check Once Completed
Ongoing, starting week of June 12 (5 wks prior)	<p>Read this Toolkit, Coordinate work with other State Captains (if there are Co-captains in your state), and ask other conference attendees from your state to participate in Hill Day meetings in conjunction with the conference and if they would be willing to host a site visit of their program in August.</p> <ul style="list-style-type: none"> <li>- "Meet" (via email/phone calls) other State Captains from your state (if any) and discuss task division, etc. moving forward.</li> <li>- See: Conference registrant list and sample letter for participant outreach.</li> </ul> <p>Determine congressional targets.</p> <ul style="list-style-type: none"> <li>- Think about Members' committee assignments, Members with whom you have a relationship, what your Members have supported in the past, and which Members might become a more vocal champion on ending homelessness.</li> <li>- See "order to schedule meetings" column of congressional target sheets as a guide, and use your discretion based on who is attending from your state (i.e. if many youth providers, veterans providers, etc., prioritize meetings with relevant Committees/Subcommittees)</li> </ul> <p>Ask other conference attendees from your state to participate in Hill Day meetings. Also ask them to organize sign on letters from their communities to bring to the Hill Meetings.</p> <ul style="list-style-type: none"> <li>- See: Sample New Participant Outreach Letter.</li> <li>- See: Sample Community Sign On Letter.</li> </ul>	
Week of June 19 (4 wks prior)	<p>Email meeting request to scheduler (copy appropriate staff).</p> <ul style="list-style-type: none"> <li>- If you can, be flexible – consider if you want a face-to-face meeting with your Member, even if it's not during the target timeslot.</li> <li>- Make sure to include in your request an invitation to tour a homeless assistance program in August (especially if the member is unable to meet in-person in DC for Hill Day). If another attendee from your state has let you know they are willing to host, specify the program name and copy them on the email.</li> <li>- See: Sample meeting request form.</li> </ul> <p>Ask colleagues (especially other conference participants) to email letters of support for the meetings to congressional offices.</p> <ul style="list-style-type: none"> <li>- See: Sample letter of support.</li> </ul> <p>As you confirm meetings, share the details of your meetings with Carter at the Alliance (we're keeping a complete schedule).</p>	
Weeks of June 26 (3 wks prior)	<p>Follow up on meeting request via email and phone with the scheduler and/or appropriate staff.</p> <ul style="list-style-type: none"> <li>- Remember to share the details of your meetings as you confirm them with Carter at the Alliance (we're keeping a complete schedule).</li> </ul> <p>Join conference call with the Alliance to learn about policy priorities and Capitol Hill Day logistics.</p> <ul style="list-style-type: none"> <li>- We will reach out with options for call times in advance.</li> </ul> <p>Confirm your State Prep Session times with Carter.</p>	

	<ul style="list-style-type: none"> <li>- Let her know of any conflicts.</li> <li>- Share the time and location with other participants.</li> </ul> <p>Call the scheduler again to confirm meeting time/location.</p> <ul style="list-style-type: none"> <li>- Let the scheduler know how many participants there will be.</li> <li>- Finalize when and with whom the meeting will be.</li> <li>- Make sure the Alliance has the updated meeting information.</li> </ul>	
Weeks of July 3, (2 wks prior)	<p>Some State Captains like to host a conference call with other Hill Day participants from their state to review policy issues and logistics.</p> <ul style="list-style-type: none"> <li>- The Alliance can help with this.</li> </ul>	
Week of July 10, (1 week prior)	<p>Reach out to offices to double confirm your meetings. Make sure the Alliance has the key details (time, location, Member or staffer name) for all meetings.</p> <p>Follow up (or encourage other conference attendees from your state to follow up) with the district and DC office about whether the Member can do a site visit.</p> <ul style="list-style-type: none"> <li>- Ask community members to write letters of support for the site visit invitation, and follow up with your point of contact in the congressional office until you have a confirmed date and time for the visit.</li> <li>- Create a work plan and timeline for an August or fall site visit if a Member has agreed to tour a program, and invite key stakeholders to attend.</li> </ul> <p>Gather local information/data for meetings, make sure you know what assignments your Members hold, and find something for which to thank your Members.</p> <ul style="list-style-type: none"> <li>- The Alliance can help with this, for instance by sharing the signers of this year's House and Senate Dear Colleague letters.</li> </ul> <p>Use this information to prepare leave-behind materials for the meetings</p> <ul style="list-style-type: none"> <li>- The Community Sign On Letter is one great leave-behind.</li> </ul>	
July 17-19 (at the Conference)	<p>Visit the Hill Day Table in the Advocacy Center to check in and get your Hill Day Packet.</p> <ul style="list-style-type: none"> <li>- Review schedule of State Prep Session times (near Hill Day Table).</li> <li>- Attend sessions related to advocacy.</li> <li>- Attend State Captain meeting, Tuesday, July 18, 8:00-8:45 am EST in room Virginia A &amp; B.</li> <li>- Lead a State Prep Session to prepare participants from your state to participate in the meetings and to deliver pop-up houses to each office in your state's congressional delegation.</li> <li>- Attend Hill Meetings. Make sure you raise the policy priorities in the meetings and take notes on the offices' responses!</li> <li>- Deliver pop-up houses to offices without meetings scheduled.</li> <li>- Report back on your meetings on Wednesday afternoon.</li> </ul>	

Week of July 24 (one week after)	<p>Remember to scan or fax in your report back forms to the Alliance if you were unable to report back while at the conference! Email participants from your state thanking them for their efforts and reminding them to report back to us also.</p> <p>Follow up with each office: thank them for the meeting, remind them of any commitments made, re-iterate the request to tour a homeless assistance program on a site visit, and provide any promised follow-up materials.</p>	
Week of July 31 (2 wks after)	<p>Confirm date, time, and location of the site visit with the Congressional office, (if you have not yet done so).</p> <p>Set an agenda for the site visit and invite other stakeholders to attend. Send a briefing memo to the congressional office and a media advisory to the local media (optional).</p> <p>Participate in CHCDF's Housing Day of Action on July 29</p> <ul style="list-style-type: none"> <li>- Plan or participate in advocacy activities on July 29 or the week before or after. This can include your site visits!</li> </ul>	
Ongoing	<p>Host your site visits in early August!</p> <ul style="list-style-type: none"> <li>- Remember to let the Alliance know how they go.</li> </ul> <p>Check out the Alliances <a href="#">CQ Advocacy Website</a> for current information on advocacy actions you can take.</p> <p>Design a year-long <a href="#">advocacy plan</a>.</p> <ul style="list-style-type: none"> <li>- The Alliance can support you in this!</li> </ul>	