

Best Practices and Tips for Advocacy and Lobbying

By Brooke Schipporeit, Housing Advocacy Organizer, NLIHC

Advocacy is the act of providing information about an issue that concerns you and organizing support for your cause. Anyone can participate in advocacy, including individuals and nonprofits. Lobbying is when you take a position on a specific piece of legislation and is the most direct form of advocacy. Most nonprofit organizations can lobby if it fits within their mission (see *Lobbying: Individual and 501 (c) (3) Organizations*) for more information about the permissions and limitations of lobbying for individuals and organizations). Advocacy can be done at all levels of government. NLIHC focuses on federal advocacy, but many of the best practices and tips included here also can be applied to state and local advocacy.

The most common type of advocacy is contact with elected officials or their staff, but housing advocacy should not be limited to legislators. At the federal level, it is often important to advocate with the White House or officials at HUD and other agencies. Advocacy directed at the White House can be especially important leading up to the president's budget proposal each year which sets the tone for budget work to come in Congress.

Whether meeting with Members of Congress or officials in the Administration, it is important to remember that constituent feedback is a valued and necessary part of the democratic process. You do not have to be an expert on housing policy to advocate for it. Providing your perspective on the housing situation in your local community is extremely valuable to officials in Washington, DC.

The most effective advocacy involves positive, ongoing relationships. Sometimes staff members or officials who may seem to be staunch opponents must be educated on housing issues before they become allies. This can be a gradual

process. After creating an initial relationship with officials and staff, you should engage with them on an ongoing basis. A best practice is to expose them to the issues of homelessness and affordable housing by inviting them to your events or to tour your organization or a housing development. It is also important to keep affordable housing allies engaged regularly so that housing remains a top priority on their agenda. Legislative allies are more likely to continue their support when they feel their efforts are noticed, so make sure to offer your thanks often, and publicly when possible.

DETERMINING ADVOCACY TACTICS

There are several important factors to consider for successful advocacy. The first is to determine the goal you wish to achieve with your advocacy. This will inform the steps that follow. The next step is to identify the proper target of your advocacy efforts. On federal issues, you will want to decide whether it is best to bring your message to a Member of Congress for legislative action or to Administration officials in either the White House or agencies. Next, consider whether you are advocating on behalf of yourself or an organization. Determining who you are representing will shape the type of message you present. If advocating or lobbying on behalf of an organization, you may need to keep specific records of your activity.

Once you have identified your audience and the message you wish to convey, there are several ways to advocate with government officials and their staff. Meetings can be an important and effective tool for both starting conversations on housing issues and strengthening relationships with housing champions. Meetings can take place in person, over the phone, or virtually on an online video platform. The overall location, timing, materials, and structure of a meeting

can dictate how effective your efforts will be. An alternative strategy to meeting with officials is to organize or attend events in your local community or online, like townhalls or webinars. Outside of face-to-face interactions, sending emails, making phone calls, writing letters, and engaging the media are strategies to encourage support and build momentum around housing efforts.

EFFECTIVE MEETINGS

A face-to-face meeting is often the most effective way to get your voice heard. If you have never participated in an advocacy or lobby meeting before, it can be helpful to think of it as a simple conversation in which you will briefly share your experiences, insight, and positions on affordable housing issues and solutions.

Consider your meeting an opportunity to build working relationships with decision makers and to educate them on the issues in your community. Many times, staff and elected officials have less information about the topic than you do. If you are representing a housing or service provider group, you can also use the meeting as an opportunity to share about the impact of your work in the area that the elected official represents.

Given the busy schedule of elected officials, they may ask you to meet with a staff person who handles housing issues. Oftentimes, meeting with staff members is just as good or better than meeting with the official. Staffers often have more time to discuss your concerns than an elected official would be able to devote, so getting to know influential staff people and building relationships with them is crucial.

During your meeting, it is a best practice to frame your message in a way that connects the information you wish to share to the official's interests as much as possible. If you can connect your work on affordable housing issues to the elected official's interest in, for example, veterans' issues, this will often create a key connection that will lead to a stronger relationship with the office as you move forward.

The steps to planning and executing an effective

meeting include scheduling a meeting, crafting an agenda that is mindful of your priorities and the limited time you have, walking through your priorities with any others who will be accompanying you, reviewing logistics, and maintaining momentum post-meeting.

Scheduling a Meeting

The first step to arranging a meeting is to call the office you hope to meet with to request an appointment. A best practice is to call about two to four weeks ahead of your intended meeting date. It may take a while for the office to schedule the meeting once you have made the request. In some cases, legislative offices do not assign specific staff to meetings more than one week in advance in order to remain flexible as committee hearings and floor votes are being scheduled.

Members of Congress have offices in Washington, DC, as well as in their home state. If you are setting up a local meeting, locate the contact information for your Congressperson's local office or for the local field office of the administrative agency you wish to meet with. If you are planning to visit Washington, DC, contact your congressional members' Capitol Hill offices or the appropriate federal agency (for contact information for key Members of Congress and offices of the Administration, see *Congressional Advocacy and Key Housing Committees* and *Federal Administrative Advocacy*).

When calling to schedule a meeting with your elected officials, identify yourself as a constituent or share that you work in the official's area of representation. Many offices give priority to arranging meetings with constituents because the time of Members of Congress and their staff is limited. Once you have identified your connection to the official, ask to schedule a meeting with them. If the scheduler indicates that the official will not be available, ask to meet with the relevant staff person. This will most often be the legislative assistant who covers housing issues. Some offices will ask you to fill out an online form, but most of the time a phone call will suffice.

Be sure to tell the office where you are from in

the district or state, the purpose of the meeting, the organization you represent if applicable, and the number of people who will be attending the meeting so the staffer can reserve an appropriately sized meeting room. The scheduler may ask for a list of names of attendees; this information can often be sent closer to the date of the meeting.

If scheduling a meeting that will take place over a virtual platform or conference call, be sure to specify this in your meeting request. Once the meeting is scheduled, confirm which virtual platform will be used and who will be setting up and sharing the virtual meeting details.

Call or email the office at least 24 hours before the meeting to confirm the details of your meeting. If you are meeting with a specific staff person, you can call or email them directly. Be sure to confirm the meeting date and time, the meeting location (i.e., the building and room number, or virtual platform and login or call-in instructions), and reiterate the purpose of the meeting. You can also send relevant materials for them to review in advance. If there are others attending the meeting with you, be sure they also have this information and your contact information in case they need to reach you the day of the meeting.

Crafting Agenda and Talking Points

Developing an agenda for your meeting will help you maximize your time and ensure that your main points and priorities are addressed. Set an agenda based on how much time you have, usually no more than 20 or 30 minutes. Important elements to consider while drafting an agenda include introductions of the people in the meeting, an overview of the issue and how it plays out in your community, two or three key issues or solutions to discuss, and a specific yes or no question to ask the official.

Once you have determined the main issues you want to discuss, it can be helpful to prepare a set of talking points for each. Include data, stories, and your own experiences where possible. Use the goal of your meeting to develop a specific “ask” on the housing issues you raise in the

form of a yes or no question. The ask should be a concrete action you would like to see them take as a step in resolving the affordable housing challenges you have presented. For example, ask if the Member of Congress will commit to supporting an expansion of affordable housing programs in this year’s budget.

When deciding how to frame your message, it is useful to research the official you are meeting with to gain insight on their interests, affiliations, committee assignments, and past positions and statements on housing issues. Committee assignments and interests are often listed on the official’s website. You can find out how a Member of Congress has voted on key affordable housing legislation at www.govtrack.us/congress/votes. If you need help, do not hesitate to contact the NLIHC Housing Advocacy Organizer for your state which you can find at www.nlihc.org/sites/default/files/NLIHC_Field-Team-Map.pdf.

If you will be joined by a group of people, decide what roles everyone will play, including who will open, close, and deliver specific asks, and who will run the technology if meeting virtually. It can be helpful to host a planning call with your group a couple of days before your meeting to review the agenda, talking points, and any relevant materials you plan to share. If meeting virtually, test the technology beforehand to make sure you and other group members feel comfortable using it and everything is working smoothly. It also can be helpful to establish cues for when each person should speak to avoid long pauses or talking over each other.

Meeting Logistics

Running through the logistical details of your meeting beforehand will contribute to a successful meeting. Make sure you know the building address and room number where your meeting is being held, or the call-in or login information if using a virtual meeting platform. It is important to arrive early to allow for time to get through security and find the meeting location, or to troubleshoot any potential technology issues if meeting virtually. Capitol Hill office buildings are large, and it takes time to navigate to the office

where your meeting will be held. It is helpful to have the name of the person with whom you are meeting and the room number readily available.

Security can be tight at federal offices, especially those on Capitol Hill. To ensure that you do not bring items that may trigger a security concern and delay your entry into a building, review the list of prohibited items in Capitol Hill offices at www.visitthecapitol.gov/plan-visit/prohibited-items.

Conducting Your Meeting

A successful meeting starts with dressing professionally and being punctual. If the meeting is being held virtually, avoid background clutter and background noise. Whether in person or virtual, a best practice is to arrive about ten minutes before the start time. During the meeting, remember to stick to your agenda and speaking times. If meeting virtually, remember to pause and allow the next speaker to unmute when switching speakers. Take detailed notes when possible, especially of any feedback you receive or any follow-up information you promise.

At your meeting, take time to introduce each attendee and their connection to the meeting's topic. Be sure to mention your connection with the official, whether you are a constituent or whether your organization serves their constituents. If your organization does not allow you to advocate or lobby as their representative, you can still refer to your work as informing your perspective on any given issue during the meeting.

Acknowledge the official's past support at the beginning of the meeting if you are meeting with a regular ally of affordable housing efforts. If meeting with an office that has an unfavorable record on your issues, indicate that you hope to find common ground to work together on issues critical to your local community. Keep in mind that as you educate congressional or administrative offices over time and develop positive relationships with them, they may eventually shift their positions favorably. Be sure to make the meeting conversational by asking the perspective of the official in addition to making

your points.

Next, provide a brief overview of the affordable housing challenges in your community and the nation. Unless you already have a relationship with the person you are meeting with, do not assume they have a deep understanding of the problem. Be sure to keep these first portions of the meeting brief so that you have time to substantively discuss your specific issues of concern. Including personal stories and experiences within your message can often get your point across in a more compelling fashion.

Move into the main portion of the meeting by giving a brief description of the top two or three specific housing issues you want to discuss. Try to present the issues positively as solvable problems and share data and experiences where possible. Utilize what you know about the official you are meeting with to frame your message in a way that connects with their professional interests, personal concerns, memberships, affiliations, and congressional committee assignments.

When discussing these issues, do not feel like you must know everything about the topic. If you are asked a question you cannot sufficiently answer, it is perfectly acceptable to say you will follow up with more information. Offering to provide further detail and answers is an excellent way to continue communicating with the office after the meeting. If the conversation turns to a topic that is not on your agenda, listen and respond appropriately but steer the meeting back to your main points since you have limited time.

Before you end your meeting, make a specific ask about something that the official can support or oppose, such as a piece of legislation or the budget for affordable housing programs. Explain how your ask fits within the official's priorities. The office will agree to this ask, decline, or say they need time to consider.

Make a follow-up plan based on this response. You will often want to present further information or recruit additional voices. Confirm with whom you should follow up and ensure you have their contact information. Agree to check in with staff

after an appropriate amount of time to find out if there is a final decision or to support other next steps. If they say no to your ask, ask how else they might be willing to address the issues you have raised, and keep the door open for future discussion.

In closing the meeting, be sure to express thanks for their time and interest in the topics discussed, share any materials you would like to leave behind with the office, and suggest ways you or your organization can be helpful in achieving the end goal of solving housing poverty. Asking for a picture together before you go to share on social media afterwards can be a great way to publicly thank the office for their time. If meeting virtually on video, you can ask to take a screenshot of everyone on screen or a selfie with the screen to share later.

Leave Behind Written Materials

It is useful to have information to reference throughout your meeting and leave with the official or staffer for further review and reference it as needed. To emphasize the extent of the housing crisis in your community, provide information such as your state's section of *Out of Reach*, which shows the hourly housing wage in each county; the appropriate NLIHC Congressional District Profile or State Housing Profile that shows rental housing affordability data by congressional district and state; your state's Housing Preservation Profile, which can be found under "Reports" at [preservationdatabase.org](https://www.preservationdatabase.org); and other NLIHC research reports which can be found at [nlihc.org/housing-needs-by-state](https://www.nlihc.org/housing-needs-by-state). Factsheets and other resources can be found on NLIHC's Legislative Action Center at [nlihc.org/take-action](https://www.nlihc.org/take-action). The Opportunity Starts at Home campaign offers factsheets about the intersection of housing with other sectors which can be found at www.opportunityhome.org.

Follow Up After Your Meeting

The best advocacy focuses on sustained relationship building. It is important to continue conversations with officials and staff after your meeting. Following your visit, send a letter or email thanking the official or staff member

for their time, reaffirming your views, and referencing any agreements made during the meeting. Include any additional information that you promised to provide.

Social media and online blogs are great tools for publicly thanking officials and their staff. Be sure to tag the official in your post and include the photo from your meeting if you have one. Utilizing online platforms allows you to publicly express your gratitude for the availability of the official and their staff and is an opportunity to strengthen your relationship. Sharing about your meeting publicly also reminds the office that they are accountable to follow up on the commitments they made to you or get information on questions they had.

Once you have thanked the office and followed through on any promises of follow-up information, monitor action on your issues and asks over the coming months. Contact the official or staff member to encourage them to act during key moments or to thank them for acting in support of these issues. If the issue that you discussed is a priority of your statewide affordable housing coalition or NLIHC, it is helpful to share any feedback you receive from the office. This feedback helps statewide coalitions and NLIHC to build on your efforts and keep you informed as issues move forward. It is also helpful to share what you learn during your meeting with your network where applicable, including your members, your board, and your volunteers.

CONGRESSIONAL RECESS

Throughout the year, Congress takes breaks called recesses when Senators and Representatives leave Washington, DC to spend time in their home communities. Recess provides advocates with a great opportunity to interact with Members of Congress face-to-face without having to travel to Washington, DC. Members spend time on recess meeting with constituents and conducting other local work. You can take advantage of congressional recesses by scheduling district meetings with your Senators and Representative or inviting them to attend

your events or tour your organization or property.

Many Members of Congress also hold town hall meetings during congressional recesses. These events provide the opportunity to come together as a community to express concerns and ask questions about an official's positions on important policy issues. If your Members of Congress are not planning to convene any town hall meetings during a recess, you may be able to work with others in the district to organize one and invite your Senators or Representative to participate.

It is important to note that Members of Congress cannot officially introduce or co-sponsor legislation during recess, and because Congress is not in session, there are no votes on legislation during this time. It is therefore especially important to follow up on any meetings held during recess once Congress resumes session.

To find out when the House is scheduled to go on recess, visit <http://house.gov/legislative>. To find out when the Senate is scheduled to go on recess, visit <https://www.senate.gov/>.

SENDING EMAILS

Email is the most common way to communicate with Members of Congress and their staff. Many congressional staff prefer emails because they can be easily labeled, archived, and tallied. Congressional offices can receive tens of thousands of emails each month, so it is important to make sure to present your affordable housing concern concisely and specifically, referencing specific bills when possible.

The best way to ensure your email is received is to reach out to the specific housing staff person in a congressional office when possible. If you do not know how to find the email address of the best person for a particular office, contact NLIHC's Field Team at outreach@nlihc.org, and they will provide that information. You can find email templates for each bill NLIHC is closely monitoring on NLIHC's Legislative Action Center at nlihc.org/take-action.

MAKING PHONE CALLS

Calls can be an effective strategy, especially if a staff person receives several calls on the same topic within a few days of each other. You may want to encourage others in your district or state to call at the same time you do to reinforce your message.

When you call, ask to speak to the staff person who deals with housing issues. If calling a Member of Congress, be sure to identify yourself as a constituent, say where you are from, and if applicable, have the names and numbers of relevant bills. The days before a key vote or hearing are an especially effective time to call. Find fact sheets and other resources to use as talking points on NLIHC's Legislative Action Center at nlihc.org/take-action.

To find the phone number for your Members of Congress, call the U.S. Capitol Switchboard at 202-224-3121.

WRITING LETTERS

Letters are a decreasingly effective tool for letting Members of Congress and other decision makers know how you feel about issues because of extensive security screening that delays delivery, but they can still be used as an advocacy tool for less pressing matters. For Members of Congress, address the letter to the housing staffer to ensure it ends up in the right hands. Use the following standard address blocks when sending letters to Congress:

Senate

The Honorable [full name of official]
ATTN: Housing Staffer
United States Senate
Washington, DC 20510

House of Representatives

The Honorable [full name of official]
ATTN: Housing Staffer
United States House of Representatives
Washington, DC 20515

ADDITIONAL WAYS TO ENGAGE ELECTED OFFICIALS

Meetings, emails, calls, and letters are not

the only effective ways to communicate your priorities to officials. Other ways to engage include:

In-Person and Virtual Engagement

- Inviting an official to speak at your annual meeting or conference (in person or virtually).
- Organizing a tour of your organization or affordable housing developments and featuring people directly impacted telling their stories.
- Holding a public event and inviting an official to speak (in person or virtually).
- Hosting a community discussion and inviting an official to participate (in person or virtually).

Social Media and Traditional Media

- Tweeting at officials or commenting on their social media posts can be effective as many officials are increasingly focused on cultivating an active presence on social media.
- Getting media coverage on your issues. Organize a tour for a local reporter or set up a press conference on your issue. Call in to radio talk shows. Write letters to the editor of your local paper or submit opinion pieces. Call a local newspaper editorial page editors and set up a meeting to discuss the possibility of the papers' support for your issue. If you succeed in generating press, be sure to forward the coverage to housing staffers of your Members of Congress.

Utilizing Influential Supporters

- Elicit the support of potential allies who are influential with officials, like your city council, mayor, local businesses, unions, or religious leaders. Ask them to speak out publicly about the issue and weigh in with your state's congressional delegation.

FOR MORE INFORMATION

- For information about NLIHC's policy priorities and opportunities to take action,

visit NLIHC's Legislative Action Center at www.nlihc.org/take-action.

- For state and local data and other resources, visit www.nlihc.org/housing-needs-by-state.
- Contact NLIHC's Field Team by visiting www.nlihc.org/sites/default/files/NLIHC_Field-Team-Map.pdf to find the Housing Advocacy Organizer for your state.

For contact information for key Members of Congress and offices of the Administration, see *Congressional Advocacy and Key Housing Committees* and *Federal Administrative Advocacy*.