

# Structuring Your Meeting

## Prior to Meeting

- Read the biographies of anyone who will be present at the 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. Biographies and committee assignments of Members can be found on their official websites. Most staff won't have public bios.
- Reach out to the Council's Government Affairs team to help provide any additional information about upcoming hearings or issues that you should be aware of before the meeting.
- Optional: Look up information about philanthropy in your state/district. This may include the number of foundations that serve your state/district, the amount of funding the state/district receives from foundations.

## What to Bring

- One-pagers on relevant issues. We have included one-pagers on the Charitable Act, the Workforce Development through Post-Graduation Scholarships Act, and donor-advised funds in this packet.
- Brochures or other information about your foundation.
- Letters, press clips, relevant data, or other materials that highlight your foundation's work and needs. We have included a sign-on letter about post-graduation scholarships and a summary of recent GivingUSA data in this packet. There are additional materials in the "Additional Resources" page of this template.
- Business cards.
- Something to write on and something to write with.

Note: It's helpful to put any materials for congressional staff together in a folder. Be mindful of how much paper you're providing to avoid overwhelming the office with material.

## What to Expect

- While these meetings are formal, they are less formal than they would be in Washington, DC. Dress professionally but comfortably. Feel free to refer to your notes when you need, and make note of anything you'd like to include in follow-up.

- If you are meeting with a Member of Congress, they will likely be joined by staff. While you may have more time because you are not meeting with them in DC, do not expect the meeting to be long. Members' schedules also change frequently, so they may have more or less time on the day than expected.
- Note: Members of Congress will likely lead parts of the conversation, particularly if you raise any policy issues they consider priorities. Be sure to touch on your most important points in these meetings.

## Draft Meeting Agenda

- **Who are you? (1-2 minutes)**
  - Everyone in the meeting can briefly introduce 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.
  - Highlight an area of your work that intersects with the Member of Congress's committee or legislative priorities.
  - 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.
  - Your tone should be conversational but professional. If you have an existing relationship or intersect with the Member in some other way, highlight that here.
- **Tell your story. (5-7 minutes)**
  - Consider choosing one or two specific initiatives or projects your foundation engaged in recently. If you are making an ask related to a specific policy issue (e.g. scholarships), your story should be related to that issue.
    - 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 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 Members and staffers will remember. Don't be afraid to tug on heart strings!
  - Story Example:
    - "Petunia Foundation focuses on educational achievement here in Petunia County and across the state. In 2019, we funded a study on declining literacy rates in Petunia public schools. The study found that it was lead poisoning and not testing, teachers, or textbooks creating the problem.
    - "Even though we are not traditionally a health funder, we partnered with a local public health nonprofit to fund and implement lead mitigation measures. In the

last four years, our partners and our foundation have funded lead mitigation in hundreds of homes across the county.

- “That’s just one example of the philanthropic initiatives our foundation takes on across the state. We want to work more closely with your office—how can we make sure you’re in the loop on this and our other projects?”

- **Ask questions.**

- Ask if the office has any questions.
  - The Member or staffer 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.
- There will be a tax package in 2025. 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.

## Following 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.

- If you met with a Member of Congress or district office staff, let the Council team know and we can meet with their DC staff for any follow-up from the conversation.
- If appropriate, invite the Member and/or their staff to visit a project or grantee, or another kind of site visit to continue your conversation and build relationships.