

Best Practices and Tips for Advocacy and Lobbying

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Advocacy is the act of providing information about an issue and organizing support for a cause. Anyone can participate in advocacy, including individuals and nonprofits. 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.

Lobbying is a specific type of advocacy when a position is taken on a certain piece of legislation. All lobbying is advocacy, but not all advocacy is lobbying. Most nonprofit organizations can lobby if it fits within their mission (see *Lobbying: Individuals and 501 (c) (3) Organizations* for more information about the permissions and limitations of lobbying for individuals and organizations).

Advocacy can take many forms, including organizing, educating decisionmakers and the public, engaging the media, hosting events, and lobbying. The most common type of advocacy is through 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. The president's budget proposal each year sets the tone for budget work to come in Congress, so annual advocacy work around this is especially important.

Whether engaging 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 state and local community is extremely valuable to officials in Washington, DC, and can make a real difference

on the decisions made that impact advocates and their communities.

The most effective advocacy involves positive, ongoing relationships with policymakers and their staff. This ongoing education and relationship building can sometimes shift decisionmakers from staunch opponents to allies, but it can be a slow process. After establishing an initial relationship with officials and staff, advocates should engage with them on a regular 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 an affordable housing development. Officials who are supportive of your issues also should be 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 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 for executive or regulatory actions. Next, consider whether advocating is on behalf of oneself or an organization. Determining who is represented will shape the type of message you present. If advocating or lobbying on behalf of an organization, specific records of activity may need to be kept.

Once the audience is identified, craft the key points to convey, then determine how you will

share this information. There are several ways to advocate with government officials and their staff. Meetings are 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 in their office is to organize or attend events in your local community or online, like townhalls, community events, or webinars, and invite your targeted officials to attend. Outside of face-to-face interactions, sending emails, making phone calls, writing letters, and engaging the media are also effective 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 meeting before, it can be helpful to think of it as a simple conversation in which you can 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 you care about and how these impact your community. Remember, advocates do not need to be experts. Oftentimes staff and elected officials will have less information about the topic than advocates, and additional information can be provided by the advocate after the meeting. If a housing or service provider group is being represented, you can also use the meeting as an opportunity to share examples of the impact of advocate 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 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 the 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. Connecting advocate work on affordable housing issues to the elected official's interest in, for example, veterans' issues, will often have a greater impact and can 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 the meeting, crafting an agenda that is mindful of your priorities and the limited time you will have, walking through your priorities with any others who will be joining the meeting, reviewing logistics, and maintaining momentum after the 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 to remain flexible as committee hearings and floor votes are being scheduled. However, offices receive many meeting requests, so do not hesitate to follow up as your requested meeting time gets closer.

Members of Congress have offices in Washington, DC, as well as in their home states. 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. This can usually be found on their respective websites. If planning to visit Washington, DC, contact congressional members' Capitol Hill offices or the appropriate federal agency (for key Members of Congress and offices of the Administration, see *Congressional Advocacy and Key Housing Committees* and *Federal Administrative Advocacy*). Members of Congress

can be reached by calling the U.S. Capitol Switchboard at 202-224-3121 or by dialing their direct number listed on their office's website. Find who your Members of Congress are at www.govtrack.us.

When calling to schedule a meeting with elected officials, identify yourself by how you are connected to the official, such as being a constituent or working in the official's area of representation. Many offices give priority to arranging meetings with people connected to the area they represent. Once you have identified yourself, ask to schedule a meeting with the official. If the scheduler indicates that they will not be available during the timeframe you request, 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 a phone call will usually suffice.

Be sure to tell the office where you are from or where you work 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 needed.

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 with the office 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 such as factsheets. 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 to ensure that the 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 including in your agenda are introductions of the people in the meeting, an overview of the issue and how it impacts your community, two or three key elements of the issue or solutions to discuss, and a specific yes or no question to ask the official or staff member. Determine how long you think you will need for each section to ensure you have time to make it to all your agenda items during the meeting.

Once you have determined the key items 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 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 funding for 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 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 the meeting, speak to each key point, and deliver your 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 and roles, 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.

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 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; and your state's Housing Preservation Profile, which can be found under "Reports" at preservationdatabase.org. These and other NLIHC research reports can be found at nlihc.org/housing-needs-by-state under "Resources." Legislation-specific resources can be found on NLIHC's Legislative Action Center at nlihc.org/take-action. The Opportunity Starts at Home campaign also offers factsheets about the intersection of housing with other sectors which can be found at www.opportunityhome.org.

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 applicable. 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 in case you need to ask for directions.

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 the 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 the speaking times you previously set for each item. 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, have each attendee briefly introduce themselves. Each introduction should mention your connection with the official, whether you are a constituent or whether your organization serves their constituents, and your connection to the meeting's topic. If your organization does not allow you to advocate or lobby as their representative, you can say you are speaking for yourself but still refer to your work as informing your perspective on any given issue during the meeting.

If you are meeting with an ally of affordable housing efforts, acknowledge the official's past support at the beginning of the meeting by thanking them. 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 policymakers and develop positive relationships with them over time, 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 key issues of concern. You can find national and state-specific housing data and factsheets at <https://nlihc.org/housing-needs-by-state> under “Resources.”

Move into the main portion of the meeting by going over the top two or three specific housing issues you want to discuss. Try to present the issues positively as solvable problems and share data, personal stories, 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. The Opportunity Starts at Home multisector factsheets mentioned previously can be helpful to make this connection and are available at www.opportunityhome.org/related-sectors.

Remember, 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. In fact, offering to provide further detail and answers is an excellent way to continue engaging 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 solution you discussed, a piece of legislation, or the budget for affordable housing programs. Explain how your ask fits within the official’s priorities where possible. The office will agree to this ask, decline, or say they need time to consider.

After your meeting make a follow-up plan based on this response, including additional information or voices. Confirm with whom in the office you should follow up and ensure you have their contact information. 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 if you have not already, and encourage the office to be in touch any time you or your office can be helpful in achieving the end goal of solving housing poverty. Finally, asking for a picture together 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.

Follow Up After Your Meeting

Because 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 social media posts 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 provided any promised 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. Be sure to share any relevant feedback you receive from the office with your statewide affordable housing coalition or NLIHC. Feedback related to each group's priorities helps build on your efforts and keep you informed as issues move forward. If you met with an office on behalf of your organization, 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 from being in session called “recesses” or district work periods 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 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, co-sponsor, or vote on

legislation during recess because these actions can only take place when in session. It is therefore especially important to follow up on any meetings held during recess once Congress resumes session.

To find out when Congress is not scheduled to be in session and therefore will be on recess, visit <https://www.rollcall.com/congressional-calendar/>, or contact NLIHC's Field Team at outreach@nlihc.org for the latest, as these schedules can sometimes change at the last minute.

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, and emails do not have to go through the lengthy security process that mailed letters do. Congressional offices can receive tens of thousands of emails each month, so it is important to present affordable housing concerns concisely and reference specific solutions or bills when possible.

The best way to ensure your email is received is to reach out to the dedicated 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. NLIHC provides email templates for key legislation on our Legislative Action Center at nlihc.org/take-action.

MAKING PHONE CALLS

Calls can be an effective strategy, especially if an office 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 around the same time that 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 specific bills you plan to reference. The days before a key vote or hearing are an especially

effective time to call. Factsheets and other resources for key legislation can be found and used as talking points on NLIHC's Legislative Action Center at nlihc.org/take-action.

To call your Members of Congress, locate Members of Congress at www.govtrack.us, then call the U.S. Capitol Switchboard at 202-224-3121, and an operator will connect you directly with the office you request. Additionally, Members of Congress each have their own website that will list the direct phone numbers for each of their offices.

WRITING LETTERS

Mailing written letters is a decreasingly effective tool for advocating with Members of Congress and other decision-makers because of extensive security screening that delays delivery, but letters 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 engage with officials about issues that concern you. Other ways to advocate 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 sharing their stories and expertise.

- 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.
- Getting media coverage on your issues and forward the coverage to housing staffers of Members of Congress. For example:
 - 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 local newspaper editorial page editors and set up a meeting to discuss the possibility of the papers' support for your issue.

Utilizing Influential Supporters

- Eliciting the support of potential allies who are influential with officials, like your city council, mayor, local businesses, unions, or religious leaders. Asking 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 or email outreach@nlihc.org.

For information on key Members of Congress and offices of the Administration, see *Congressional Advocacy and Key Housing Committees* and *Federal Administrative Advocacy*, and find your members of Congress at www.govtrack.us.