MORTGAGE ACTION ALLIANCE

August Recess: Virtual Meeting Toolkit

In an era when communications can be overwhelming, meetings with legislators add value to the advocacy process. Your legislators want to hear from you, their constituents, about the important issues facing the district, the state, and the country. This toolkit aims to assist you in holding effective, virtual meetings with your legislators.

CONDUCTING A VIRTUAL MEETING

Virtual meetings have the ability to be just as effective as in-person meetings. Often, they can even allow greater flexibility, making it easier to schedule a meeting. When requesting your meeting, be clear on whether it is set to be held virtually and use the following tips to help facilitate dialogue.

- Ensure that all parties have information to log on to the virtual meeting platform. If you need assistance, contact MBA at maa@mba.org to set up a meeting link.

- Discuss the issue(s) to be presented at the meeting ahead of time and decide who will take the lead in presenting the issue(s). This is particularly important if there are a lot of first-time advocacy participants attending the meeting. Members of MBA's Advocacy Team are available to participate in a pre-meeting conference call to discuss tips for the meeting or to go over the issue(s).

- In lieu of business cards share the contact information of all constituents who will be on the call.

- If possible, make sure that all participants are on camera.

- Provide all "leave behind" materials as attachments ahead of the meeting.

- Consider using a virtual background with your company logo.

1. Find out When Your Lawmakers Will Be in Town

- Begin by taking a look at the Congressional Calendar to determine when legislators are on "District Work Period" breaks. Members are frequently at home in August, around holidays, and at the beginning and/or end of each week. Unfortunately, the House and Senate do not necessarily follow the same calendar.

2. Before the Meeting: Things to Consider

- What is the purpose and desired format of the meeting (i.e., state association meeting, virtual facility visit, or virtual visit with local congressional office)? What issues are you presenting?

- Are other local associations working on this issue, and, if so, should you include them in the meeting to increase your collective voice?

- How many colleagues or industry peers do you want to include in the meeting? How will you identify these individuals?

3. Request a Meeting

- Contact the legislator's local office, which can be found on his or her individual website at U.S. House of Representatives or U.S. Senate. To look up your elected official, visit MBA's Advocacy Action Center or download the MAA App and click on the "More" tab to access the Congressional Directory.

- Ask for the contact information of the person who schedules in-district meetings for the member of Congress. You will need to submit your meeting request in writing, even if you speak to someone in the legislator's office. Review the sample in-district meeting request letter to help get you started.

- Let MBA know when you have appointments scheduled by e-mailing maa@mba.org. MBA staff can provide updates on current legislative issues or answer any questions.

4. Preparing for Your Meeting

- Confirm your appointment with the legislator's office one to two weeks prior to the meeting. Legislators' schedules change quickly, so confirming the details of the meeting is always a good idea.

- Learn as much as you can about your legislator's background. For example, determine his or her political party, the Congressional committees on which he or she serves, and personal facts such as hometown, education, and profession. Most of this information can be found on the individual's congressional website.

- Request materials that you can share with your legislators by writing to MBA's Advocacy Team at maa@mba.org. These materials include an overview of MBA's policy priorities as well as information about relevant legislation.

- Know your issue well and be familiar with how it affects your businesses and customers. Know all sides of the argument. Have the materials for your lawmakers in hand before the meeting begins.

- Take a look at the Congressional Meeting Scenarios chart to determine how you might respond to legislator/staff reactions.

5. During Your Meeting: Make an ASK!

- Start the meeting by introducing all of the participants. Discuss where you work and what you do. **Do not assume that the member of Congress knows what a loan originator or underwriter does day-to-day. Use this opportunity to educate your legislator.**

- Use only part of your allotted time to present your issue. Leave time to hear the lawmaker's thoughts or to answer any of his or her questions.

- If the lawmaker doesn't volunteer his or her position on the issue, ask!

- Don't feel that you need to know the answer to every question. If you are asked a question that you can't answer, say that you will look into the question and give the lawmaker an answer as soon as possible.

- Be sure to politely ask your lawmaker to do something! Lawmakers meet many constituents, but they won't know how to help unless you clearly state what you want them to do.

- For example, you might say, "Support bipartisan, bicameral legislation to enable the nationwide use of RON" and include the link to RON page (mba.org/ron). Make your "ask" clear and concise.

- If the opportunity presents itself, take a screen-shot of the virtual meeting. Please share these with MBA's Advocacy Team at maa@mba.org and we will amplify on social media.

6. After Your Meeting

- Send a thank you letter and re-emphasize key points you discussed during the meeting. Be sure to provide any additional information you may have promised and send a copy of any pictures taken with the legislator.

- Let MBA staff know how the meeting went by e-mailing maa@mba.org or calling (202) 557-2933. This information will be crucial to MBA staff in planning future lobbying efforts and will ensure that MBA's message is consistent.

- Thank all of your colleagues who participated in the meeting. Share any screen shots that were taken and ask for feedback on how to improve future meetings and how to continue to build the relationship with the legislator.

DOs	DON'Ts
• Be prepared to meet with your legislator and/or their staff	• Don't mention any personal or MORPAC contributions or other planned or previous financial support of the member
• Be prompt, polite and pleasant	
• Be succinct — get to the point quickly	• Don't be late
• Be specific in what you are asking for and quantify when possible	• Don't be impatient, rude, argumentative or abrasive (today's opponent may be tomorrow's ally)
• Use personal stories to underscore a point about the issue that brings the concern home to the lawmaker's district or state.	
• Provide your "leave behind" materials in advance and leave your contact information for follow-up.	• Don't assume the member will know or remember you
• Offer to be of further assistance and to serve as a resource	• Don't give the member too many materials
• Thank the member for their valuable time and remember to send a short thank you letter when you get home	• Don't underestimate the influence of the staff

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