



NATIONAL ASSOCIATION OF
STATE TREASURERS

How to Influence Policy From 1,000 Miles Away

*Effectively communicating with key policymakers and staff from
the safety of your own home*

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Types of Communication

DIRECT OUTREACH

Communicating With Members & Staff

Members Often Accessible at Events in Home State/District

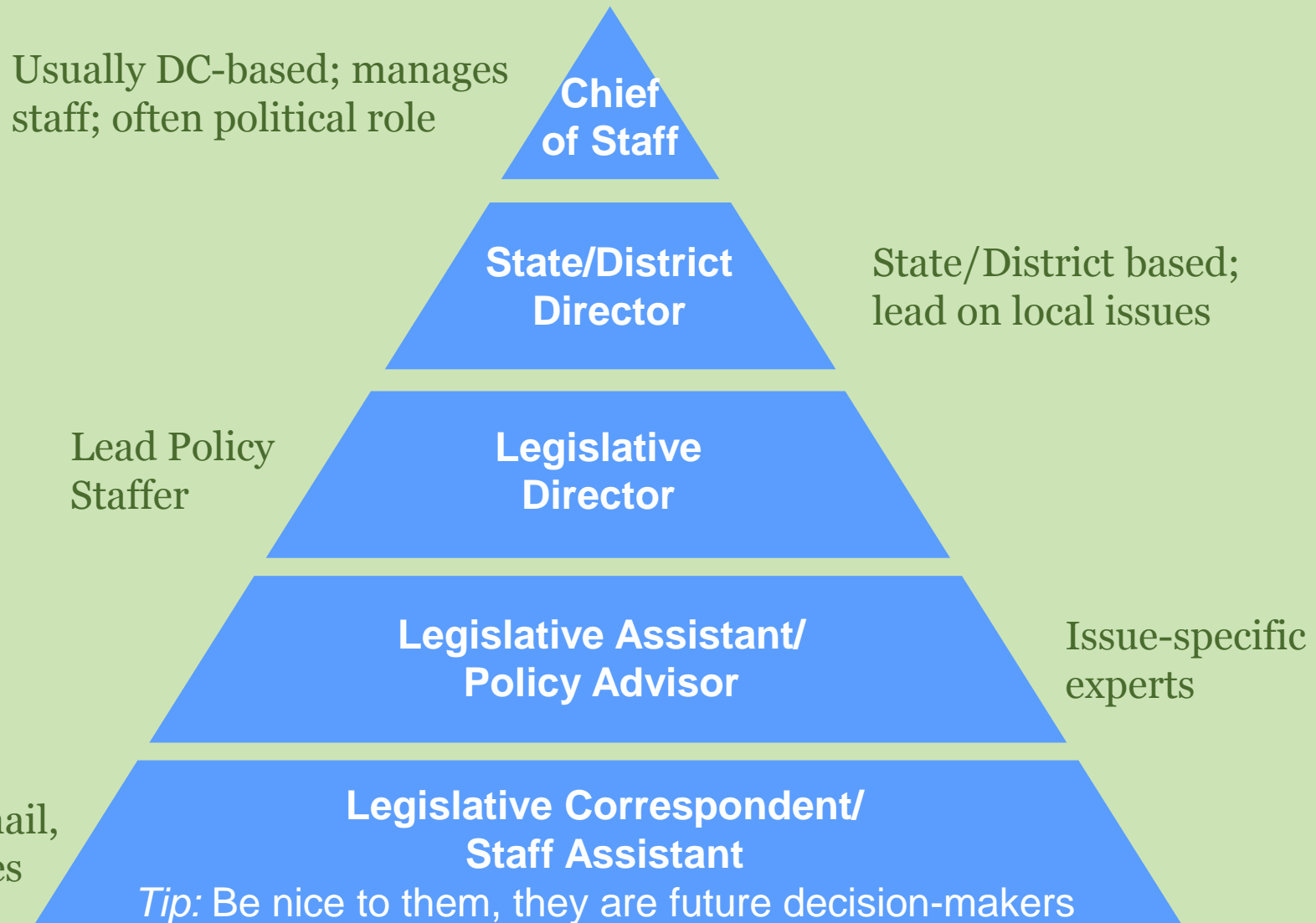
Staff Drives Policy

- Congress and the Administration are Staff-Driven Institutions
- Members of Congress rely on recommendations from staff on 95% of issues

Staffers Are Gatekeepers

- Staff often controls access to Members
 - Decide which issues rise to the top
 - Make recommendations on co-sponsorships, letters, etc.
 - Draft statements, speeches, and op-eds for Members

Who are the Key Staffers?



How to Make “The Ask”

- **Email**

- The preferred method of communication: staff has a record of the request
- Personalize the information to the Member’s office and outline why it’s important to their State – BE SPECIFIC AND JOBS are important
- Draft should be concise, include an attachment with additional information, and should clearly define “the ask”
- Request they respond by a certain date
 - Examples: Co-sponsor legislation; send letter to an Agency; contact the Committee Chair or Leadership

- **Phone Call**

- Have script/talking points prepared in advance
- Personalize the information/explain importance to state/BE SPECIFIC
- Clearly define “the ask” and request they respond by a certain date

- **Meeting in District**

- Bring copies of materials
- Have script/talking points prepared in advance

Stay In Touch/Be a Resource

- Look for opportunities to follow-up with staff
 - Provide them helpful data and information on the topic
 - Volunteer to do research for them
 - Send topical local stories that they might have missed
 - Keep them updated on legislative developments
 - Offer to connect them to other stakeholders/experts
- Be friendly and personable; develop relationship with staff over email by establishing yourself as a trusted resource

Tip: KNOW THE GUIDELINES

Ensure compliance with Lobbying Disclosure Act guidelines:

http://lobbyingdisclosure.house.gov/amended_lda_guide.html

Use NAST/DC Staff as a resource for questions

Types of Communication

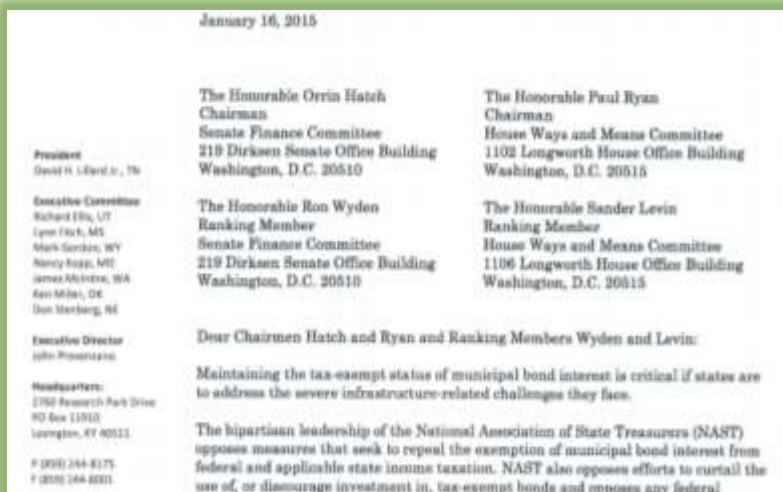
INDIRECT OUTREACH

Traditional & Social Media

- **Op-eds:** Highly effective in getting Members' attention on issue
 - *Tip: Members receive press clips from key local publications: Op-eds placed in well known local or state publication can be just as impactful as op-ed in a large national paper*
- **Press Releases:** Send copy of press releases to Members/Staff
- **Blogs:** Identify the key policy blogs in your state and get message out through a blog posting
- **Social Media:** Tweet about key policy; NAST is a resource for content and how to use Twitter effectively
 - *Tip: Tweet @ your Members of Congress so your message shows up in their feed that will be read by their staff*

Examples of Effective Communication

M U N I C I P A L B O N D S



Examples of Effective Communication

5 2 9 P L A N S

May 29 529 Day: Ohioans Speak Out in Support of Protecting College Savings Plans & Expanding Opportunity

Tags: Education, jobs and the Economy, Taxes


Today is 529 Day, a day to recognize hardworking Americans who planned ahead and invested in college savings plans for their children, and recommit ourselves to ensuring this critical tool remains available to middle-class families who rely on it. Here are some of their stories:

- "We are very grateful that the 529 program was available to help us make wonderful things happen for our children's education." Scott and Trisha Prunty (Fremont, OH)
- "Our sons are now 30 and 28 and both college graduates with NO debt due to the opportunities from the 529 plan." - Elizabeth from (Middletown, OH)
- "We hope that the 529 College Savings Plan will become available in every state in our country and will remain tax free." James and Christine Beover (Dayton, OH)
- "The 529 College Savings Plan gives the middle class family, (such as ours) a chance to make college affordable by investing in it as the children grow up. It worked for our family and it can work for many other families throughout our great country." -James and Christine (Dayton, OH)

Here's why 529 Day is especially important: Earlier this year, the president **proposed a tax on 529 savings plans that would have made it harder for millions of middle-class families, many of whom are already struggling in this economy, to put money away for college.** That's right - the president actually proposed a tax on parents paying for college with money they've saved in their tax-free college savings accounts.

The House **stood with the American people** and held the line against the president's proposal, forcing him to drop it from his budget. Yet, despite the president's reversal, the White House maintains that taxing college savings plans is still **good policy**.

Middle-class families disagree - and that's why the House has taken action. Earlier this year, we passed H.R. 529 to **protect, modernize, and expand** college savings plans. The bill, which passed with

 **Speaker John Boehner** 
@SpeakerBoehner 

Bipartisan bill makes #529plans more flexible to help Americans save for college. j.mp/1wdFcCv via @BettyKLochner

12:11 PM - 25 Feb 2015

Following your college savings intuition

A bill by Reps. Lynn Jenkins (R-Kan.) and Ron Kind (D-Wis) seeks to make 529 plans more flexible


 The Hill @thehill

19 RETWEETS 12 FAVORITES

February 26, 2015, 07:30 am

Following your college savings intuition

By Betty Lochner

COMMENTS 1

American families recognize the value of a dollar. And they recognize how important each and every dollar is when it comes to saving for college for their loved ones.

Their intuition is that saving for college tuition is a high priority. However, over the past decade, college costs have risen nearly 51 percent. For a family, figuring out how to pay can be quite taxing. Many families rely on financial aid to combat costs, assuming that assistance will come in the form of scholarships and grants that do not have to be repaid. In practice, however, more than half of federal financial aid comes in the form of loans that not only must be repaid, but also incur interest. Recent reports indicate that student loan debt is almost at \$1.2 trillion.

ADVERTISEMENT



As a means to offset the need for loans and keep families from getting saddled with debt, 529 college savings and prepaid tuition plans are a manageable and affordable alternative, designed to encourage early saving for future higher education expenses. By the middle for 2014, American families invested a record \$244 billion in 529 plans, according to data collected by the College Savings Plans Network.

From: [REDACTED]
Sent: Wednesday, March 11, 2015 3:19 PM
To: [REDACTED]
Subject: Message from State Treasurer Fitzgerald regarding S. 335

[REDACTED]

On behalf of Iowa's 529 plans, College Savings Iowa and IAdvisor 529 Plan, I encourage you to support and pass S. 335 in an effort to better support American families in their efforts to save for their children's college education. Iowa's 529 plans have over \$4 billion in investments. Iowans are using this vehicle as a way to save for college and I'd like to work with you to make the plans even better.

Specifically, S. 335 includes the following enhancements to 529 Colleges Savings Plans:

I. Making computers an eligible expense

Probably the most needed and exciting piece of this legislation is the provision to make computers an eligible expense. In today's high tech world where the focus of education is on Science, Technology, Engineering and Math (STEM), it is hard to believe that electronic devices are not considered qualified higher education expenses. As more and more classes begin using e-books and cloud-based learning programs, it is clear that computers, tablets and mobile devices are at the heart of today's college learning environment.

Case Study – Tax Exempt Muni Bonds

Preparation

- Identified clear and immediate threat (President's Budget Request and Congressional Deficit/Tax Proposals)
- Listed Key Members and Committees of Jurisdiction
- Identified natural champions and advocates (former Treasurers, Mayors, Governors, etc. serving in Congress)

Action

- Email and phone calls to potential champions; asked them to write letters to Leadership and Committee Chairs to urge preservation of tax exempt munis
- Organized emails and phone calls to Senate Finance and House Ways and Means Committee Members
- Provided comments and data to tax reform working groups
- Developed strategy to neutralize/work around opponents and engage champions
- Deployed NAST Leadership and Members for op-eds; press releases; letters; and other media

Advocacy “Dos and Don’ts”

DO	DON'T
<ul style="list-style-type: none">✓ Tailor your message; be clear✓ Highlight jobs and local benefit/harm – BE SPECIFIC✓ Request they respond by certain date✓ Identify and email the right staff✓ Follow-up and keep in touch✓ Develop relationship and be helpful and courteous✓ Seize the opportunity, send them helpful news stories✓ Use NAST/DC staff as a force multiplier	<ul style="list-style-type: none">✗ Expect them to always agree✗ Be overly aggressive with staff✗ Ask for <i>quid pro quo</i>✗ Be discouraged by staff turnover✗ Forget to follow-up and let them know this issue is important

Tip: Find Your Representative by Zip Code:

<http://www.house.gov/representatives/find/>

House Address Standard Format: [FirstName].[LastName]@mail.house.gov

Senate Address Standard Format:

[FirstName]_[LastName]@[SenatorLastName].senate.gov

Questions & Discussion

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