



On the next few pages are a series of activities to complete in order to earn your a star as a credit union advocate.

LEVEL 3

GRASSROOTS ADVOCACY

SUPPORTING MATERIAL

Now that you know where to find the contact information for lawmakers, email or telephone an office and ask if you can schedule an appointment with one. Sometimes you will be asked to meet with a staff member. That's fine! Legislative staff play important roles in their offices, shaping the conversation on issues and serving as gatekeepers. On the federal level, a staff member may also specialize in financial services legislation.

We strive to meet with our Congressmen in district meetings, you don't have to worry that a floor vote will take the Congressman away from the meeting!

Sometimes your best bet is to meet with a staffer in the district office. You get more time to talk, and the staff member will write up a report to send to the Washington office. There are also times of the year when the Congressman or Senator is in the district. That is when Congress is in recess. You can look up the calendar for the U.S. House and Senate on their respective web pages.

ASSIGNMENT



Arrange a meeting with a lawmaker or a staff member on either the state or federal level. Prepare leave-behind material showcasing how your credit union is demonstrating the CU Difference. Invite at least one other credit union member and a League staffer. Submit a contact report on the meeting to the League afterwards.

The League will provide leave-behind material for the legislative office on current issues. We will also update you on these legislative issues relevant to the visit, and give you a contact report to fill out afterwards on the meeting.

Legislators excel at counting. They need to count how many votes for or against a bill, and they need to count how many people pledge to vote for them. When they hear how many of their constituents are credit union members, it makes an impact on them!

The Credit Union National Association (CUNA) has a program to determine how many credit unions members live in state and federal districts. It's called Project Zip Code, or PZC for short. The program gives not only a total, but also breaks down which credit unions these members have joined. Even if your credit union is not a member of CUNA, you can still participate in PZC. You will need a password, which you can obtain by registering for free at www.cuna.org. Update Project Zip Code. You will need to use the same password that you use to access the Credit Union National Association (CUNA) web site. If you do not have a CUNA password, you can obtain one for free at www.cuna.org.

Email completed Assignment to ksherbin@vacul.org

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ASSIGNMENT



Run the PZC program for your credit union. If your credit union has done it before, it needs to be updated (this should be done at least annually). If it has never been done before, you will initiate the process if your senior management authorizes you to do so. Usually the IT department does the actual uploading.

Your credit union will have to upload information to CUNA to determine which of your members live in what legislative districts. There is no privacy issue with this process.

Says CUNA: Your information is safe and secure with Project Zip Code. No personally identifiable data or individual information leaves your computer. Project Zip Code receives only the counts of records successfully matched by the program. All of your data remains confidential and secure with Project Zip Code. "Project Zip Code is compliant with the privacy laws created in Gramm Leach Bliley."

How to PZC: [Go to http://pzconline.com/](http://pzconline.com/). There is a menu on the left-hand side that includes a button to install PZC. Click that button and you will find instructions.

Now that you know about PZC, you can make use of it yourself for your own advocacy efforts. You can obtain membership numbers yourself when visiting lawmakers. And your marketing department can make use of the numbers too!

We've already discussed the importance of responding to an action alert. The power of action alerts lies strictly in the number of emails sent to lawmakers. Therefore, each credit union should strive to have as many staff and volunteers respond to these alerts as much as possible.

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Set up a system to maximize the number of Action Alert respondents from your credit union.

How you do so will depend on the size of your credit union, its culture, and input from senior staff. For instance, you can do a general distribution list of all employees, and all board members. If there are many employees, perhaps it could be delegated to a key person in the different departments, like an operations center or a branch.

You will have to devise a measurement system. Some credit unions ask that their staff inform them when they have completed the action alert. Others have provided incentives such as raffle prizes for those who respond to the alert. You can be creative! And let people know what happens with the bill, or the issue.

Thank all who participate.

Supporting our allies, building relationships.

Campaign volunteers are cherished by candidates. People running for office cannot knock on every door or phone each potential voter. Volunteering on a campaign is one of the top ways that credit unions can build meaningful relationships with candidates. Let's face it, lawmakers are besieged by constituents and special interest groups. Like anyone else, they will have a more open mind with those they know. They also will garner a greater appreciation of credit unions in their district.

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Invest six hours as a campaign volunteer.

What can you do as a volunteer? These are the usual tasks:

Knock on doors or make telephone calls. Both of these activities have the same goal. Earlier in the campaign they are done to identify voters likely to support the candidate. Later in the campaign, they are done to remind these likely voters to go to the polls (known as the Get Out The Vote phase, or GOTV).

You will be given a script and instructions. Usually with door knocking two people go out together. The aim of these activities is not for you to debate with people, so don't worry about having to know everything about the candidate and campaign platform. It could be as simple as: "I'm calling on behalf of candidate Jane Doe, who is running for state delegate. She's very concerned about creating jobs and providing good education for our children. Can Jane Doe count on your support at the polls on Nov. 8?"

Most of the people you contact will be polite, even if they don't support the candidate or wish to be disturbed at home. Having candidates reach out to voters is the price of living in a democracy!

Staff a campaign office. Answer phones, welcome people to the office and direct them to campaign literature or yard signs.

Put up campaign signs. The campaign will identify property owners who want to display a sign. Someone has to deliver them!

Data input. Once people are identified as likely supporters, their names and phone numbers have to be stored in a database for GOTV.

If you need help connecting with a campaign, contact Karin Sherbin at the League. If you are a DIY person, google the candidate's name. There should be a Volunteer button on the web site.

There are elections in Virginia every year for state and/or federal lawmakers.

Lawmakers are keen to learn more about businesses in their districts, as well as mingle with voters.

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Arrange for a lawmaker to visit your credit union

Good "hooks" for inviting the lawmaker: new branch opening; financial literacy class in the credit union (ask participants permission ahead of time); member appreciation event; or you want the lawmaker to talk with the staff who have to deal with regulatory burden the most. If you feel confident you could pull it off, plan a reception with staff and members and tell the lawmaker s/he could meet with constituents. Don't forget to invite the volunteers!

Also, if you have a nice meeting room, let the lawmaker know that. Sometimes they are looking for free places where they or their staff can hold office hours to meet with constituents.

Call their offices and ask to speak to the person who schedules the lawmaker. Explain that you are representing a business in the lawmaker's district, a business that serves X number of constituents (look it up on Project Zip Code). Give details as to when, how long, who will be there, and speaking opportunities.

In general, lawmakers aren't accepting gifts anymore. If you want light refreshments, that's fine. If you have something that might be of significance to the district's history, or something that would be personally meaningful (e.g., the lawmaker's grandparent helped found the credit union, and here's a memento from the opening) may be appreciated.

Let the League know you are hosting this visit. If you need advice, we're glad to help. Also glad to update you on any legislation/issues that may be relevant.

Take photos and let the membership know of the lawmaker's visit. Use Facebook, web site, newsletter, Twitter and any other SM you usually use, and let the lawmaker's know of the coverage. Tag them, etc.

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