Archives, Public Policy & You

ADVOCACY GUIDE

Updated in July 2020 to include new section on Advocacy in Your State and Community (page 24)

Society of American Archivists
Council of State Archivists
Regional Archival Associations Consortium
National Association of Government Archives and Records Administrators

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This guide is heavily dependent on (and, in some cases, identical to) information provided in the National Humanities Alliance's Advocacy Guide. We are grateful to NHA for giving us permission to use and/or adapt the information to meet our needs. NHA has been doing advocacy effectively and well for many years, and that organization serves as a model and inspiration for SAA, CoSA, NAGARA, and RAAC.

INTRODUCTION

THANK YOU FOR GIVING YOUR TIME TO ADVOCATE FOR ARCHIVES AND RECORDS!

Your visit to your Member of Congress—whether on Capitol Hill or in your district—is an important part of a broader advocacy strategy to support crucial issues for archives, archivists, and those who use archives for a range of purposes and outcomes. It aims to persuade our legislators to support key issues and initiatives, such as federal funding for archives programs (and the agencies that support them), government transparency and accountability, and appropriate management of electronic records, to name a few. As a constituent (or the representative of an organization with members who are constituents), you can testify to the positive impact of archives programs in your district and state.

This document will guide you through goals for your meetings and ways in which to prepare in advance. It also offers advice on what to expect when meeting with representatives, senators, and their staff members. And finally, it provides suggestions for following up and building long-term relationships.

NOTE: It is important to define your target legislators based on their committee assignments. For example, because federal funding for archives has long been of critical interest to archivists, our organizations have identified four congressional subcommittees (two in the Senate and two in the House) that are responsible for recommending funding of the National Archives and Records Administration and its National Historical Publications and Records Commission, the National Endowment for the Humanities, and the Institute of Museum and Library Services. If you live and/or work in the district or state of a member of one of these subcommittees (or the chair or ranking member of the standing committee), we hope that you'll use your leverage as a constituent to advocate for these agencies. Links to the key subcommittees and their Members are provided here:

- Senate Appropriations Committee / Subcommittee on Financial Services and General Government
- Senate Homeland Security and Government Affairs Committee / Subcommittee on Regulatory Affairs and Federal Management
- House Appropriations Committee / Subcommittee on Financial Services and General Government
- House Oversight and Government Reform Committee / Subcommittee on Government Operations

Information about individual Members may be found at www.house.gov and www.senate.gov.

ADVOCACY ON CAPITOL HILL: Engaging Members of Congress in Washington, DC

BEFORE YOUR MEETING

DETERMINE YOUR GOALS

Prepare for your meeting with the following goals in mind:

- Establish a collegial relationship with the office. This is a long-term investment that will depend on follow-up from you and our professional associations.

- Address misconceptions about archives—and the humanities in general—and show the Member the impact of your work in the community.

- Make **specific requests**. See the SAA website at https://www2.archivists.org/advocacy/publicpolicy for specific messages, Issue Briefs, and Talking Points. Click on the "Take Action!" button.

- Gauge the Member's attitude toward the archives and records issues for which we are advocating.

- Provide information that will allow a Congressional staff member to create a memo on those archives- and records-related issues that will inform the Member's official policy position.

REVIEW THE INFORMATION WE HAVE PROVIDED

- Review this Advocacy Guide. Each section provides important information that will help you prepare for your meeting.

- Read and understand the Issue Briefs and Talking Points available at https://www2.archivists.org/advocacy/publicpolicy.

RESEARCH YOUR MEMBER'S BACKGROUND AND VOTING RECORD

- Each Member of Congress has a website that provides biographical information as well as information about what that Member thinks is important. Scour the website. Find personal connections that could help you establish a relationship with the Member of Congress or staff member; it is important to find some sort of common ground. Find your Member's website at www.congress.gov.

- Some easy-to-access sources, such as local newspaper articles and even Wikipedia, may provide more nuanced information than is available in official bios and on websites.

- Look for political stances or personal interests that may intersect (however broadly) with archives, records, history, and the humanities.

Identify ways in which archives and records issues and concerns affect the Member's district/state or intersect with policy areas of interest to them.

- Describe the ways in which your work and the work of your organization affect the well-being of the Member's district or state.

- Mention the importance of government records to documenting democracy, government transparency, and citizens' rights.

- **Remember:** While Members of Congress have different perspectives on policy, they share a keen interest in the opinions of their constituents and the impact of government funding on their districts and states.

Identify upcoming events to which you might invite your Member of Congress.

- Events like the opening of a new exhibition in your repository, a National History Day judging, or a community forum can be a good opportunity to engage a Member of Congress if they are at home during a recess. See page 18 for tips on inviting a Member of Congress to an event.

- These events will help create connections among your work, the constituents who care about your work, and the Member. Make connections!

Identify materials that you can leave behind.

- A business card to hand to staff members at the beginning or end of the meeting.

- A brochure or handout about your organization's work.

- A folder containing an overview of archives/records or Issue Briefs to leave with each office.

If you are visiting the office with one or more colleagues, be sure to discuss leave-behinds with the rest of your team so that you can decide on the most coordinated way to present them.

The worksheet on the following page will help you plan for a high-impact visit.

WORKSHEET: PLANNING FOR A HIGH-IMPACT VISIT TO THE HILL/DISTRICT OFFICE

1. How do you plan to connect?

Based on your background research, list potential commonalities that you might have with the Member of Congress or the staffer, whether personal or professional (eg, alumni of the same college, Member was a history major, children attend the same middle school, Member's spouse is a librarian, Member interned in an archives, Member has spoken at your institution, etc).

____
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2. **How will you make the case for archives issues of concern to our community in light of the Member's views and record?**

Explain why these programs complement the Member's political stances or personal interests based on your research into the Member's background. This can include areas of overlap with the topics covered by committees they sit on or bills they've introduced.

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3. What benefit(s) do the programs or legislation for which you are advocating bring to the Member's state/district?

Use your knowledge about your work and information from the Issue Briefs to identify initiatives in the Member's district that have benefitted from federal support. You might also draw on your general knowledge about challenges faced in the state/region and how archives programs address them.

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4. What specific request will you make?

Look at the Member's committee assignments. While thinking about the Member's record of support and position and the Issue Briefs, what will you request?

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5. What might you offer as a follow-up?

Show initiative by considering how you might **follow up** with more information about your work, an invitation to an upcoming event, a copy of a photograph or document from your institution's collections, or additional information that may have come up in your discussion.

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THE MEETING

There are three House and three Senate Office Building on Capitol Hill. We have included a map on page 12 for your reference.

ARRIVING AT THE OFFICE

Security Protocol: Allow sufficient time to pass through security when you enter the House and Senate buildings. This can be 15 or more minutes, depending on the time of year and legislative activity. Once you are inside one of the House buildings you can travel by underground hallways into the other buildings without having to go through security again. The same holds true for the Senate buildings.

Building and Floor Numbers: In the **House Office Buildings** (Cannon, Longworth, and Rayburn), the first numeral in the room number corresponds to the building, the second to the floor, and the third and fourth to the room. Cannon is represented with 0, Longworth with 1, and Rayburn with 2. For example, room 122 is on the first floor of Cannon, while room 2310 is on the third floor of Rayburn. In the Senate Office Buildings (Dirksen, Hart, and Russell), the initial letter corresponds with the building name (D, H, or R) and the three numerals indicate the room number, with the first numeral indicating the floor. For example, S-316 is in the Senate's Hart Office Building on the third floor.

Time Management: Arrive at the Member's office at least 5 to 10 minutes early. Because distances between and within the Senate and House office buildings are great and navigation within buildings can be confusing, make sure that you begin your walk to the next meeting as soon as possible.

Check in with the staff member at the front desk. The staff person will likely ask for your business card, so you (and each member of your delegation) should have one ready to give them.

Most House offices are fairly small, so your delegation may have to wait in the hallway. Senate offices are significantly larger. Take the opportunity for small talk with the staff in the reception area. (Ex: How long have you worked here? Are you from the state/district? Are you enjoying all the things to do here in Washington, DC?)

Once you are in the office, look around. Members may have items in their offices that will allow you to make a connection and start a conversation.

WHO YOU ARE MEETING AND WHAT TO EXPECT

Although you may have a meeting with a representative or senator, you will generally meet with a staff member who is entrusted to work on behalf of the Member. It is important to remember that nearly all staff members, regardless of rank, age, and experience, are talented and relied on by the Member and by senior staff. The most common positions you'll encounter in meetings are:

Chief of Staff: The Member's most senior advisor, a chief of staff coordinates the office's strategy, manages all staff members, and frequently acts and speaks on behalf of the Member. **The chief of staff's time will likely be limited**, so really make the meeting count if you have an opportunity to meet with this staff person.

Legislative Director/Senior Policy Advisor (LD): Typical years of experience: House 8+; Senate 18+.

This very experienced staffer manages the LAs and LCs, directs overall legislative strategy, and advances the agenda through high-level discussions with other offices.

Senior Legislative Assistant/Legislative Assistant (LA): Typical years of experience: House 0-8; Senate 6+. This staffer has a high level of responsibility, with a portfolio of issues that they manage for the Member—although knowledge of each issue may vary considerably.

Scheduler/Executive Assistant: Typical years of experience: varies widely, but this is not a junior position. This individual 1) often has the most contact with a Member and is deeply trusted; 2) sometimes has a minor legislative role in House offices; and 3) often has a great sense of the Member's priorities and opinions.

Legislative Correspondent (LC): Typical years of experience: 0-3. The LC provides support on legislative issues to senior staff and works under the supervision of more senior staff to draft proposals that the Member cosponsors or signs on to, but usually gets approval from someone more senior first. This individual may not have a deep knowledge about the agencies and programs we care about and may not know the Member's position. But that does not mean that they will disregard your case. So be prepared to drive the conversation. LCs may have very little to say, but are likely to be happy to take the full half hour to hear about the issue.

THE CONVERSATION

You will typically have about 10 to 15 minutes—5 at the least and 30 at the most—to make your case. You may consider working with your team to agree on who will take responsibility for talking points for each of the following items.

THANK, INTRODUCE, AND CONNECT: **Thank the Member or staffer for meeting with you**. Identify yourself, your team, and your organization. You may want to begin with a statement about your institution's impact on the community or information about programs that your organization sponsors. This may also be a good opportunity to try to connect with the Member or staffer on a personal level so that they remember you and your visit at the end of the day.

MAKE YOUR CASE AND RELATE IT TO THE MEMBER: Drawing on the Issue Briefs and Talking Points that you've reviewed in advance, **make a persuasive case** about the impact of federal funding and/or legislation on archives programs. Remember to **focus on the positive**.

Frame your case in terms that will resonate with the Member of Congress. What issues are they passionate about? How do these intersect with archives, history, government accountability, electronic records, and/or the humanities? How can archival programs, for example, further their interests? Explain how archives programs, teaching, research, and preservation have a positive impact on communities in their district. Invite them to an event at your institution that might increase their popularity.

STATE YOUR REQUEST: **State your request directly, being as specific as possible**. Is the Member willing to take a more active role in championing archival issues or legislation? Is the Member a member of the Congressional History Caucus? If so, thank them; if not, ask them to become a member. The staff member will most likely take notes while you are talking, so follow up to ask if they need for you to repeat or clarify anything for their notes as the meeting progresses.

OFFER ADDITIONAL RESOURCES: **Don't let the conversation end once you leave the office**. Present yourself as a potential resource to the Member and staff. Leave literature behind and offer to provide additional information. Make plans for future contact — for example, promise to send information about a topic you discussed. Ask for a business card and inquire about how you might contact their office in the future. Remember to thank them again for their time and for discussing the importance of federal funding and legislation for archives.

DEALING WITH DIFFICULT SITUATIONS

IF THE STAFF MEMBER SEEMS UNINFORMED OR INEXPERIENCED:

- **Be prepared to drive the conversation**. This is not necessarily a sign of a lack of interest or disregard for your case. Whether these meetings last 5 minutes or 20 usually depends on how much advocates have prepared to say.

- **Leave materials behind** that will help the staff member write a memo about the subject, and invite that person to contact you (or the SAA, CoSA, or NAGARA staff offices) if they ever have questions or need information.

IF THE STAFF MEMBER HAS VERY LITTLE TIME:

- Thank the staffer for taking time to meet with you and for the Member's support (if appropriate).

- Quickly demonstrate the support for archives and records in your community by mentioning organizations you're a part of or briefly sharing an example of an important archives program.

- Follow up with an email providing more resources.

- A week after the meeting, check on the status of any specific requests you made during your visit (e.g., asking the Member to support federal funding, contact a key committee chair, join the Congressional History Caucus, or support legislation).

IF THE MEMBER IS UNSUPPORTIVE:

- Try to identify why the Member is unsupportive and if any misperceptions exist.

- Don't be afraid to politely dispel any misperceptions that come up. For example, common misperceptions about federal funding for archives include:

    "Archives and humanities grants are awarded by government bureaucrats."
    Explain that experts from around the country serve as peer reviewers for all grants.

    "Government funding crowds out private investment."
    Explain that many NHPRC, NEH, and IMLS grants require private matching funds that incentivize and facilitate private support.

    "Federal funding doesn't help my district and constituents."
    Be prepared with examples from your state/district.

Don't give up! Try to tailor the discussion to their concerns.

AFTER THE MEETING, CONTINUE BUILDING THE RELATIONSHIP

USE SOCIAL MEDIA TO PUBLICIZE THE MEETING

- Say thank you to the Member and, by first name, the staff member on Twitter and Facebook. Use the hashtag #ArchivesOnTheHill and tag the Member of Congress.

- If possible, take a picture of your team with the staff person or Member during the meeting and post it along with the thank you.

SEND A FOLLOW-UP EMAIL MESSAGE

- Thank them for their time and their support or consideration, as appropriate. When an office is unsupportive of archives or records issues or concerns, stay positive and **please avoid expressing disappointment!**

- Because you're likely to be sending your follow-up message to the staff member with whom you met, your message might include, "Please pass along my thanks to Congresswoman X for the time that you spent with us."

- Send along any additional information and materials that you promised.

SAMPLE EMAIL MESSAGE

Here is an example of a follow-up email to give you an idea of what kinds of points you might make. If you feel that a more detailed follow-up would be appropriate, please reach out to the SAA, CoSA, or NAGARA staff offices for help in crafting it.

Dear _____:

Thank you so much for taking the time to meet with [Name of your organization] today! We really appreciated the opportunity to discuss [issue/project] and to give you more information about [upcoming event/opening/initiative]. As always, we are so grateful for [Member's] support of our projects and the [NEH/NHPRC]. These programs are so important to our community. We'll keep you updated on any developments.

Additionally, please find [document/resource you discussed in meeting] attached to this email. Please don't hesitate to reach out if you have any questions or require further information from us. Again, thank you so much for your time today.

Sincerely,
[Name]
[Contact Information]

GIVE US YOUR FEEDBACK

Please give your "home" organization (SAA, CoSA, RAAC, and/or NAGARA) feedback on your visit by filling out the **Post-Visit Worksheet** (page 23) and emailing it to the organization's staff office.

Details about how Members of Congress or staff members responded to your questions can be helpful in:

- Gauging their level of support and their attitudes about archives and records.
- Noting particular interests in or objections to federal funding for archives.
- Honing our arguments and strategizing about new approaches to unsupportive Members.
- Identifying Members who are interested in becoming more involved in promoting the interests of archives in Congress.

If you let us know about your visit, we'll send you an "I'm An Archives Advocate" button!

REMEMBER THAT EFFECTIVE ADVOCACY IS YEAR-ROUND

Once you've made in-person contact with a congressional office, it's much easier to communicate on specific policy issues in the future.

Hold your elected representatives accountable by monitoring and acknowledging their actions on the policy issues that matter to you. You can do this by emailing the staff member with whom you have met.

Add the office to your organization's mailing list or periodically forward selected publications and news items of interest.

On social media, like and follow your legislators, offices, and the federal agencies of interest to help gather information and increase visibility. See what else your legislators are up to/thinking about.

Invite the Member to participate in a local archives or humanities event. Take pictures and post them on your organization's website, Twitter, and Facebook to thank the legislator for their involvement with archives issues. See page 18 for tips on inviting a Member of Congress to an event.

Send to the staff member a relevant photograph or scanned document from your institution's collection as a follow up and to keep the conversation going.

THANK YOU FOR GIVING YOUR TIME TO ADVOCATE FOR ARCHIVES AND RECORDS!

LAYOUT OF CAPITOL HILL AND SURROUNDING AREAS

DISTRICT ADVOCACY:
Engaging Members of Congress on the Local Level

In addition to meeting with Members of Congress in Washington, an equally important way for advocates to engage with their elected officials is to schedule a visit with their local offices or invite them to attend a tour or special event. These in-district engagements are logistically easier and also help to establish stronger relationships over time.

Following are two key strategies for engaging with your Member of Congress on the local level: The first outlines how to initiate and conduct a meeting with a senator, representative, or staffer in a district or state office, and the second outlines how to invite a senator, representative or staffer to an event (such as a repository opening, public lecture, or tour) and create a meaningful role for them during the event that will foster engagement and investment in your organization.

As you consider possibilities for engaging with Members of Congress, be sure to make use of resources available through your repository's "home institution," such as government relations offices, media relations offices, and deans' offices, and follow any guidelines in place for advocacy at your institution.

MEETINGS IN DISTRICT AND STATE OFFICES

Representatives and senators maintain offices in both Washington, DC, and their home states and districts. Each type of office has a slightly different set of priorities and functions: Washington offices are centered on policymaking and congressional duties at the Capitol; district and state offices are tasked with facilitating Members' engagements at home.

District offices handle constituent outreach and service and also keep a finger on the pulse of constituents' wants and needs in the district. These offices communicate regularly with the Washington office, and messages conveyed at the district level do figure into policymaking decisions. Many Members have more than one district office. For example, Representative Tom Cole (OK-04) has three offices in his Oklahoma district, located in Ada, Lawton, and Norman. Similarly, Senator Amy Klobuchar has four regional offices throughout Minnesota which serve, respectively, the northeastern, northwestern, metro, and central/southern regions of the state. When scheduling a meeting or event in a district, you'll want to identify which office is located nearest to you or to the event, and begin there.

The goals of a meeting at a district or state office are similar to the goals of a meeting at a Capitol Hill office:

- Establish a collegial relationship with the office. This is a long-term investment that will depend on follow-up from you and our professional associations.

- Address misconceptions about archives and records—and the humanities in general—and show the Member the impact of your work in the community.

- Make specific requests, such as join the bipartisan Congressional History Caucus or sign a "dear colleague" letter that supports funding for NHPRC.

- Gauge the Member's attitude toward the archives and records issues for which we're advocating.

- Provide information that will allow a Congressional staff member to create a memo on those archives- and records-related issues that will inform the Member's official policy position.

In addition to the convenience of meeting close to home, district visits may last longer than a Washington office meeting (giving you a greater chance to make a connection) and are often more relaxed because the Members and staff are at "home."

Consider visiting as a group. Meeting in-district also provides an opportunity to gather colleagues from your organization and/or related organizations to hold a shared meeting with the Member of Congress or staff. Meetings like these give a concrete picture of the variety of archives work in the district or state and the range of constituents concerned with archives- and records-related issues.

SCHEDULING A MEETING

WHEN TO MEET

If you would like to meet with your Senator or Representative: You can increase your chances by requesting a meeting date that falls on a week when Congress is in recess and by being flexible with your date. For example, if you are able to meet any time during the last two weeks of November, the scheduler should have lots of options for working around the Member's existing schedule. **Note:** The House's recess schedule is easy to find online on the House Majority Leader's website. There are several sources for the Senate schedule and the schedule changes frequently, making it difficult to find information about certain dates.

If you would like to meet with a staffer: It is reasonable to request any time for a meeting with a staffer. District staffers work full time in the offices located in-state, so you will be able to schedule a meeting with them even if the Member is in Washington, DC.

Making contact with the office:

- Explore your connections and resources. Although anyone can schedule a meeting with a district office, if you already have a direct connection with a district staffer (or a connection through a board member or someone else in your institution), consider asking that person to facilitate a meeting. Working through an existing connection may result in a quicker response and may also provide additional positive context for your meeting. If you work on a college or university campus, reach out to your government relations office (if you have one).

- If you don't have an existing connection, contact the Member's scheduler. Some Members employ one scheduler who handles all of the meeting requests for both locations, while others have one scheduler for the Washington office and another who manages the district schedule. If contact information for the district scheduler is listed on the Member's website, feel free to reach out directly. If the website provides only a meeting request form, be sure to note clearly that you would like to schedule a meeting in the district and not in Washington, DC.

If you're having trouble tracking down the scheduler: If you've already checked a Member's website and are still unable to find information about the process for scheduling a meeting or event, call the Member's office and ask for the scheduler's email address or for the best way to request a meeting.

Script for Finding Scheduler Contact Information:

"Hello, I'm calling from [Organization Name] and I'm wondering if I could get the name and email address of your scheduler, please?" OR "Hello, I'm calling from [Organization Name] and I'm wondering what would be the best way to schedule a meeting. I'm having trouble finding contact information for your scheduler on the website. Could you help me?"

What to say in the meeting request: When you reach out with a meeting request, be sure to include the following items in a clear, concise, and specific email:

- Your organization's name. (If you use an acronym, make sure to write out the full name—no matter how obvious it may seem.)
- Your contact information.
- Potential meeting dates (see above).
- Specific district office where you would like the meeting to take place.
- Specific meeting topic (e.g., "We would like to request a meeting with Rep. Doe to discuss the importance of local records preservation programs in our community, as well as funding for the National Historical Publications and Records Commission").
- Names and titles of each person attending the meeting, with their organizational affiliations.

PREPARING FOR THE MEETING

- Research the Member and identify ways in which their policy interests intersect (however loosely) with archives, history, libraries, or the humanities.

- Prepare to describe the impact of federal archives or records funding or legislation on you or your organization.

- Research federal grants to the district or state more generally to make the case for a broader local impact. (Visit https://www.archives.gov/nhprc/projects/states-territories to view NHPRC grants awarded by state and territory and NEHforAll.org for profiles of compelling NEH grants.)

- See the SAA website for Issue Briefs on a wide range of topics, including federal funding for archives. (https://www2.archivists.org/statements)

- Identify an event to which you might invite the Member. District staffers are focused on community outreach and constituent engagement. Presenting them with opportunities to engage with your organization is an effective way to build a relationship.

- Identify materials (business card, brochure, invitation) that you can leave behind.

- Consider the questions posed on the worksheet on page 6 as you plan for your high-impact visit.

THE MEETING

WHO YOU ARE MEETING

Although you may have a meeting with a Member of Congress, your meeting will usually be with a staff person who is entrusted to work on behalf of the Member. You might be meeting with one of the following staff members:

Chief of Staff: Coordinates the office's strategy and manages all staff; frequently acts and speaks on behalf of the Member.

District Director: Manages the district staff, directs district outreach and engagement strategy, and advances the agenda through high-level collaboration with other congressional offices.

Field Representative / Constituent Services Representative / Casework Manager / Constituent Advocate: Has a high level of experience with organizations and constituents in the community and a strong grasp of demographics, opinions, and trends.

Scheduler / Executive Assistant / District Office Manager: Manages the Member's district, congressional, travel, and personal schedules, and sometimes has a minor legislative role in House offices.

Staff Assistant: Provides support to senior staff on legislative and administrative tasks. May not have a deep knowledge of legislative issues but will likely be very willing to take the full meeting time to hear your pitch.

WHAT TO BRING TO THE MEETING

There are a variety of "leave-behind" materials that might be helpful to refer to during the meeting or leave with the Member or staff person after the meeting. Leave-behinds might include:

- **Dear Colleague letters**, which are written by Members of Congress and circulated to other offices. They can serve several purposes, from simply notifying other Members of an upcoming event, to calling on the head of a federal agency to support an issue, to calling for a certain appropriations funding level for a program or agency. When Members "sign on" to a Dear Colleague letter, they are lending their support to the letter's purpose or "ask." You might bring a Dear Colleague letter pertaining to your issue to a meeting along with instructions for signing on and ask the Member to lend their name in support.

- **Issue Briefs,** which are one-page summaries of issues or pieces of legislation that include all of the key points that someone with a limited knowledge of the situation would need to understand the basics. A brief should include key monetary figures or statistics that illustrate the scale of the issue, previous actions or progress made, an outlook on possible future outcomes, and potential next steps. Issue Briefs on a variety of issues are available on the SAA website.

- **If your organization has pamphlets, brochures, or other materials that illustrate the work you do** (especially in an easily consumable, simple, and eye-catching format), these also make great leave-behinds that will keep the work you do fresh in the minds of Members and staffers even after your meeting.

THE CONVERSATION

THANK, INTRODUCE, AND CONNECT: Thank the Member or staffer for meeting with you. Identify yourself and your organization. Try to connect with the Member or staff person on a personal level so that they remember you and your visit at the end of the day.

MAKE YOUR CASE AND RELATE IT TO THE MEMBER: Drawing on the Issue Briefs and (particularly) your own experiences, make a persuasive case about the impact of archives and records programs or legislation in a way that is meaningful and will resonate with the Member. Need help? Let us know via the SAA, CoSA, or NAGARA staff offices!

STATE YOUR REQUEST: State your request directly, being as specific as possible. Is there a letter you would like the Member to sign? Or a caucus for them to join? Will the Member take a more active role in championing the NHPRC?

OFFER ADDITIONAL RESOURCES: Don't let the conversation end once you leave the office. Present yourself as a potential resource to the Member. Leave literature behind and offer to provide additional information.

FOLLOWING UP

Effective follow up will help build your relationship with the office and reiterate your message.

SOON AFTER THE MEETING

- Say thank you to the Member and, by first name, the staff person on Twitter and Facebook. Use the hashtag #ArchivesOnTheHill and tag the Member of Congress.

- If possible, take a picture of your team with the staffer or Member during the meeting and post it along with the thank you.

SEND A FOLLOW-UP EMAIL MESSAGE

- Thank them for their time and support or consideration, as appropriate. When an office is unsupportive of archives issues or concerns, stay positive and **please avoid expressing disappointment!**

- Because you're likely to be sending your follow-up message to the staff member with whom you met, your message might include "Please pass along my thanks to Congresswoman X for the time that you spent with us."

- Make sure that you get a business card for any staff person you meet to ensure that you have full name, title, and email address for follow-up.

- Send along any additional information and materials that you promised.

Sample Email:

Dear _____,

Thank you so much for taking the time to meet with [Name of your organization] today! We really appreciated the opportunity to discuss [issue/project] and to give you more information about [upcoming event/opening/initiative]. As always, we are so grateful for [Member's] support of our projects and the [NEH/NHPRC]. These programs are so important to our community. We'll keep you updated on any developments. Additionally, please find [document/resource you discussed in meeting] attached to this email. Please don't hesitate to reach out if you have any questions or require further information from us. Again, thank you so much for your time today.

Sincerely,
[Name]
[Contact Information]

STAY IN TOUCH

- Continue to touch base with all staffers with whom you came in contact.
- Thank them for any supportive comments.
- Send press clippings about your work or other updates.
- Invite the Member to future events (see below).
- Try to touch base every two to four months. If you have any specific news in the meantime, use that as a reason to be in touch sooner.

INVITING A MEMBER OF CONGRESS TO AN EVENT

Although meetings in a district office present a more personal setting that allows you to make meaningful connections with Members and their staff, a Member's presence at an event can be an extremely effective way to showcase your work and highlight its impact. When possible, offer the Member an opportunity to speak at an event. This will give the Member the chance to reflect on the value of archives and records and to highlight their record on cultural heritage issues. Having a speaking role may also make the Member more interested in attending.

PLANNING AND SCHEDULING THE EVENT

IDEAS FOR EVENTS

- A performance or a showcase of your work.
- A breakfast, lunch, or dinner featuring a speaker who will present on a topic pertinent to your mission.
- A gala or benefit dinner.
- A celebration of a milestone or an award you have received (e.g., receipt of a grant, award from the community for your work).
- A workshop for teachers or other professionals visiting from out of town.
- A National History Day judging.

CONSIDER THE TIMING

- When possible, schedule your event far in advance. You'll want to reach out to the Member's scheduler about two months before the event if you would like them to speak and about one month in advance of the event if you would just like them to attend.

- Plan around Congressional recesses. You can use the House and Senate online session calendars to determine when the House or Senate are out of session. (Note: The House's recess schedule is easy to find online on the House Majority Leader's website. There are several sources for the Senate schedule and the schedule changes frequently, making it difficult to find information about certain dates.)

- Even if you can't schedule your event during a recess, send an invitation anyway. A Member might happen to be home for another event or might be willing to send a staffer in their place.

HOW TO REACH OUT

- Explore your connections and resources. Although anyone can schedule a meeting with a district office, if you already have a direct connection with a district staffer (or a connection through a board member or someone else in your institution), consider asking that person to facilitate the request. Working through an existing connection may result in a quicker response and may also provide additional positive context for your meeting. If you work on a college or university campus, reach out to your government relations office (if you have one) to notify them of the event and that you would like to invite a Member of Congress. They might be able to help!

- If you don't have an existing connection, contact the Member's scheduler. Some members employ one scheduler who handles all of the meeting requests for both locations, while others have one scheduler for the Washington office and another who manages the district schedule. If contact information for the district scheduler is listed on the Member's website, feel free to reach out directly. If the website provides only a meeting request form, be sure to note clearly that you would like to invite the Member to an event in the district and not in Washington, DC.

If you're having trouble tracking down the scheduler: If you have already checked a Member's website and are still unable to find information about the process for scheduling a meeting or event, you can call the Member's office and ask for the scheduler's email address directly, or for the best way to request a meeting. Script for Finding Scheduler Contact Information: "Hello, I'm calling from [Organization Name], and I'm wondering if I could get the name and email address of your scheduler please?" OR "Hello, I'm calling from [Organization Name], and I'm wondering what would be the best way to invite [Member's Name] to an event. I'm having trouble finding contact information for your scheduler on the website. Could you help me?"

Script for Finding Scheduler Contact Information:

"Hello, I'm calling from [Organization Name] and I'm wondering if I could get the name and email address of your scheduler, please?" OR "Hello, I'm calling from [Organization Name] and I'm wondering what would be the best way to invite [Member's name] to an event. I'm having trouble finding contact information for your scheduler on the website. Could you help me?"

WHAT TO SAY IN THE INVITATION

In an initial email, be sure to include:

- Your organization's name. (If you use an acronym, be sure to include the full name as well no matter how obvious it might seem.)
- Your contact information (email and phone).
- Date of the event (or potential dates if flexible).
- Location of the event.
- Event name and details.
- Clear and detailed participation "ask" (i.e., "We would like to invite Rep. Doe to give a 15-minute speech to our members on the importance of X in our community").
- Offer to provide talking points on the requested topic if you are asking a Member to give a speech.
- List a date by which you need an RSVP. This will help ensure that your request is handled quickly.
- Let the scheduler know if you are willing to schedule the event around the Member's schedule, and share the potential dates you've identified.

STAY FLEXIBLE

- Members have very tight and typically very fluid schedules that often change up until the last moment. Be prepared for a Member to ask for adjustments even during the week of the event, such as moving their speaking time 10 minutes earlier or later or requesting to arrive near the end of the event rather than at the beginning.

- Keep the lines of communication with the Member's scheduler open, and remember that a positive interaction with a Member at your event can be the start of an ongoing, collaborative relationship that will be to your benefit.

DAY OF THE EVENT

Set a meeting place: As you are planning the event, designate one of your staffers to meet the Member of Congress and their staff at a specific location upon their arrival. Share these details with the Member's office to ensure an easy meet-up on the day of the event.

Confirm the schedule: Designate a point of contact on the Member's staff with whom you can communicate on the day of the event. Confirm the day's schedule with that person and provide any updates in real time throughout the day. The scheduler will likely be your point of contact, but it may also be one of the Member's staffers who will accompany them to the event. Ask which method of communication they prefer, but be prepared to communicate via text or email—these options are usually easiest when Members are on the move.

Backup plans: Sometimes Members' schedules are subject to forces beyond their control, such as changing vote schedules or emergency meetings. Have a backup plan in case the Member needs to adjust the arrival or departure time. If the Member is running late, can someone else be moved forward in the program to speak first? If the Member must leave early, can you have them speak right away at the beginning of the event? Additionally, ask the Member's staff if you can print out a backup copy of any materials the Member may use for the event so that you can have them available at the venue. Many Members will speak without notes or might prefer to keep them private, but it's always good to offer.

Photo/Video: Confirm before the event whether it's okay to photograph or videotape the Member while they are presenting. If the answer is yes, be prepared with your own equipment. Be aware that the staffer accompanying the Member may also take photos or video at the event to use for office purposes. Communicate beforehand if there are any restrictions (e.g., no photography due to sensitive art or artifacts) that the staffer will need to follow.

Press: It's essential to communicate your intentions for press involvement to the Member's staff before the event. Let them know if you plan to have media present and, if so, what kind (i.e., newspaper, local broadcast news, national news outlet). Work with the Member's staff to accommodate any requests to exit or enter the event in a way that either engages or avoids the press if necessary.

Parking: Provide information about parking/drop off for the Member's staff prior to the event. Most Members will be driven to the event and dropped off. Sometimes the staffer who is driving will stay at the event and require a place to park or wait. They may also return at the end of the event to pick up the Member.

Gifts/Awards: If you intend to present the Member with a gift or an award at the event, make sure that your choice falls within the acceptable standards of the gift rules for Members of Congress and their staff. The gift rules can be found on the webpages of the House and Senate ethics committees.

Food/Dietary Restrictions: If the Member will be present at an event that involves a meal or other food and beverages, ask beforehand about any dietary restrictions that the Member might have (i.e., vegetarian, allergic to eggs, does not drink alcohol) and be sure to accommodate them.

FOLLOWING UP

SOON AFTER THE EVENT

- Say thank you to the Member and, by first name, the staff person on Twitter and Facebook. Use the hashtag #ArchivesOnTheHill and tag the Member of Congress.

- If possible, take a picture of your team with the staffer or Member during the event and post it along with the thank you.

SEND A FOLLOW-UP EMAIL

- Thank them for their time and support or consideration, as appropriate. When an office is unsupportive of archives issues or concerns, stay positive and **please avoid expressing disappointment!**

- Because you're likely to be sending your follow-up message to the staff member with whom you met, your message might include "Please pass along my thanks to Congresswoman X for the time that you spent with us."

- Make sure that you get a business card for any staff person you meet over the course of the event to ensure that you have full name, title, and email address for follow-up.

- Send along any information and materials that you promised, as well as photos of the event.

Sample Email:

Dear _____,

Thank you so much for attending [name of event] yesterday. Your [presence/remarks/other participation] lent so much to the event, and we really appreciated the opportunity to showcase [exhibit/project]. As always, we are so grateful for [Member's] support of our projects and the [NHPRC/NEH]. These programs are so important to our community, as you saw yesterday. We'll keep you updated as the [project/exhibit] continues. Also, as we discussed yesterday, please find [document/resource you discussed] attached to this email. Please don't hesitate to reach out if you have any questions or require further information from us. Again, thank you so much for joining us. We look forward to welcoming you again in the future!

Sincerely,

STAY IN TOUCH

- Continue to touch base with all staffers with whom you came in contact.
- Thank them for any supportive comments.
- Send press clippings about your work or other updates.
- Invite the Member to future events.

GIVE US YOUR FEEDBACK

Please give your "home" organization (SAA, CoSA, RAAC, and/or NAGARA) feedback on your visit by filling out the **Post-Visit Worksheet** (page 23) and emailing it to the organization's staff office.

Details about how Members of Congress or staff members responded to your interactions can be helpful in:

- Gauging their level of support and their attitudes about archives and records
- Noting particular interests in or objections to federal funding for archives.
- Honing our arguments and strategizing about new approaches to unsupportive Members.
- Identifying Members who are interested in becoming more involved in promoting the interests of archives in Congress.

THANK YOU FOR GIVING YOUR TIME TO ADVOCATE FOR ARCHIVES AND RECORDS!

WORKSHEET: POST-VISIT REPORT

Your name (reporting for team): ____

Member of Congress:____

State/district: ____

With whom did you meet? Name/position:

____

Did the Member/staffer make any commitments regarding your ask(s)?

____

____

Did the Member/staffer raise any questions or objections to your ask(s)?

____

____

Did you commit to follow up on any specific issue or request for additional information?

____

____

Are there areas in which we can collaborate with this Member beyond our specific ask(s)?

____

____

Do you need any additional resources or assistance in following up after your visit? If so, what needs do you have?

____

____

Comments:

____

____

____

____

____

THANK YOU FOR GIVING YOUR TIME TO ADVOCATE FOR ARCHIVES AND RECORDS!

Advocacy in Your State and Community

As a national organization, SAA's focus is primarily the federal government and national legislative issues with Congress. But many of those national issues also are present in our states, municipal and local governments, and communities. Many of the approaches and techniques used for national advocacy efforts can be implemented readily with those entities, and because they are nearer to our repositories, our colleagues, and our users, advocacy can be more direct and even more immediate in its effectiveness.

This section of the Advocacy Guide suggests what you need to do to become a more active archival advocate in your state and community.

GETTING STARTED

If you're not already experienced with advocacy at the state or local level, a good place to start is connecting with people and organizations in the archives and records management community to learn more about issues, approaches, and "how things work" in state and local government.

Among those to whom you can reach out to do some fact-finding:

- **The State Archives and State Archivist:** If you don't already have contact with this organization, check with the Council of State Archivists to find your agency and learn about where it is placed in state government. (www.statearchivists.org)

  Some state archives are combined with records management, some are independent. Some are part of a library and museum agency, while others are part of the Secretary of State's Office. And others are part of a state historical society, cultural affairs, or other government agency. That placement may affect how much they can be involved with advocacy, but the State Archives/ State Archivist can inform you of current issues, legislation, and how your government operates in relation to archives. And they may share valuable information with you about key stakeholders and interested groups.

- **The State Historical Records Advisory Board:** Each state and territory has an appointed SHRAB, a group of professionals and citizens who provide advice on issues and needs in your state. Given their mission, they should be a good resource for identifying areas in need of advocacy efforts. The activities and involvement of SHRABs vary from state to state, but often they are well-versed in local issues and the needs of local programs. The SHRAB works directly with the State Archives.

- **Local Government Records Management and Archives Programs:** Most local governments have some form of records management to guide their care of the records they produce. In some states it is more focused and guided through the State Archives, in others it is more localized. Some counties and cities, particularly in large urban areas, have well-developed records management and even archival programs. Again, contact the State Archives to learn about the status of issues and areas for advocacy with local governments in your state.

- **Regional and state archival organizations** can also be a good resource for finding out about the status of archives in your state and communities, as well as hearing from other archivists about the issues of concern and connecting with partners with whom you can work. For information on regional, state, and community archival organizations, check with the Regional Archival

Associations Consortium (RAAC) at https://www2.archivists.org/groups/regional-archival-associations-consortium-raac.

IDENTIFYING ADVOCACY ISSUES

You may already have in mind some issues or ideas—like how your state or local government officials manage their email; the Freedom of Information or privacy laws in your state; how executive-level records are managed (or not managed!); or getting additional funding sources for archives and archivists. The groups and individuals noted above may have ideas to share, may be aware of efforts underway, may help you connect with others with similar interests, and may be able to help clarify and define advocacy issues.

FACT-FINDING ABOUT "HOW THINGS WORK" IN YOUR STATE OR LOCAL GOVERNMENT

As you identify an issue or advocacy goal to pursue, it's important to find out how things "work" in various government settings. You will need to know and/or gather background information on:

- Who or what group manages or makes decisions relating to the issue or topic or can affect any decisions. In your state government, for example, there will be key agencies that are involved, particular legislative committees under whose auspices any legislation will have to be addressed, and key officials who may have the ability to make or break any effort you undertake.

- The legislative/governmental processes involved in making the change(s) you seek, budget and legislative cycles and timelines that will affect when to do advocacy, and existing laws or regulations that may affect both your topic/issue and your advocacy efforts.

Some useful sources of information on the operation of state and local governments, in addition to the individuals and groups noted previously, can be found through the following websites:

State-Level Government Institutions
- Government websites
- State legislatures, state agencies, city councils, city managers, county boards
- National Council of State Legislatures (www.ncsl.org)
- National Governors Association (www.nga.org)
- Organizations for most state government offices:
    - NASCIO for Chief Information Officers
    - NASS for Secretaries of State

Local-Level Government Institutions
- Statewide organizations for local governments:
    - Associations of mayors
    - Associations of school boards/superintendents
    - Associations of county, town, city clerks
- State professional associations and local chapters of national organizations
    - Association of Records Managers and Administrators (ARMA)
    - Archival associations
    - Institutional government affairs liaison (good for all levels of government)

CONNECTING WITH YOUR AUDIENCE

Once you have identified issues, partners, key leaders, and the people or groups to whom you need to deliver your advocacy message, the remaining steps are very much the same as those for advocacy at the federal level. The information provided in other parts of this guide on preparing for, conducting, and doing follow-up on meetings is directly applicable. Check out those sections and apply them to your state and community advocacy situation or initiatives.

If you have questions or need help in working through those steps, contact SAA, CoSA, NAGARA, or RAAC for advice or assistance.

TO CONTACT SAA, COSA, NAGARA, OR RAAC:

Society of American Archivists
saahq@archivists.org
www.archivists.org
866-722-7858

Council of State Archivists
info@statearchivists.org
https://www.statearchivists.org/
502-229-8222

National Association of Government Archives and Records Administrators
info@nagara.org
www.nagara.org
202-508-3800

Regional Archival Associations Consortium
https://www2.archivists.org/groups/regional-archival-associations-consortium-raac