



NEW MARKETS  
TAX CREDIT COALITION

# Take Advantage of Time At Home

Build a Meaningful Relationship  
With Your Senators and Representatives

April 2017 In-District Advocacy Toolkit

## In this advocacy toolkit, you will learn:

- ⇒ Why in-district advocacy is critical to your success
- ⇒ Easy ways you can take action, whether you have 1 minute, 15 minutes, 30 minutes or more
- ⇒ How to share your efforts and build momentum with fellow Coalition members

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# Advocacy Starts at Home

## *In-District Activities Critical to Your Success*

Congressional Recesses provide NMTC advocates and practitioners with the perfect opportunity to engage with legislators. The next recess will take place from April 10-21, 2017. While the NMTC currently has a five-year extension, passed in the PATH Act in December 2015, Congress and the Trump Administration have made tax reform a priority. Our goal is to ensure members of the House and Senate tax-writing committees understand the importance of the NMTC to rural and urban communities that have been left outside the economic mainstream.

Early in 2016, Speaker of the House Paul Ryan created six committee-led task forces earlier this year charged with "developing a bold, pro-growth agenda that will be presented to the country in the months ahead." House Ways and Means Chairman Kevin Brady led the Tax Reform Task Force and released the plan on June 24. The NMTC, along with many other popular provisions, is not included in the plan, but the task force staff made it clear that this is just the starting point in their minds. The Senate has indicated it will likely have its own bill and the President will surely want to delve further into his own outline, which largely mirrored the Ryan blueprint. As these plans progress, the NMTC community must work together to ensure the NMTC is a part of whatever tax reform legislation that emerges.

For this reason, we are urging those with an interest in the New Markets Tax Credit (NMTC)—community development entities (CDEs), investors, businesses, civic and community leaders—to reach out to their Members of Congress' District offices. Take advantage of upcoming in-district periods and show your Senators and Representatives and their staffs how the NMTC is having a positive impact on their areas. There is no substitute for a tour of an NMTC-financed business, visiting a project under development, or taking part in a ribbon-cutting—events where legislators can meet and hear about the effect the NMTC from constituents, businesses and local officials, leaving a large and lasting impression of the effectiveness of the Credit. This is especially important if your Representatives and/or Senators are members of the House Ways and Means Committee or the Senate Finance Committee.

In this toolkit, you will find tips for powerful actions to cultivate a new relationship or nurture an existing relationship with your Senators and Representatives at home and—most importantly—demonstrate the need to permanently secure this effective financial tool.

- ◆ **Invite your Senators and Representatives to visit a project.** Show him or her why the work you do is important to their district, and how that work is supported by the NMTC.
- ◆ **Meet one-on-one and bring some friends.** In-district meetings during recess are a great way to keep the issue in the forefront of their minds and back up what they have heard from us in D.C. It also allows you to bring business owners and other beneficiaries to validate your message on the importance of the NMTC.
- ◆ **Hold a community roundtable.** Partner with other local organizations and inviting your Senators and Representatives to discuss the issues.
- ◆ **Write an Op-Ed.** Showcase the impact the NMTC has made in your community, grow public support for your work, and inform local leaders on the importance of the credit.

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The good news is that it can take as little or as much time as you have to devote to action. While those activities listed above are the best opportunities to have an impact on your legislators, we have also listed **quick actions that can be taken in an hour or less.**

We hope these ideas will inspire you to take advantage of the upcoming recess. Doing so will not only increase your power and influence on Capitol Hill, but also help ensure that our voice carries the strength that it needs to be heard on the issues that matter most. **I encourage you all to contact Ayrienne Parks to let us know how we can help.**

Sincerely,



Robert A. Rapoza  
Rapoza Associates

## **We Can Help!**

### *Get Support On Your In-District Activities*

We are ready to provide NMTCCoalition members with answers to questions on details, provide guidance on how to carryout activities and brainstorm ideas on activities. We can help draft and edit materials for meetings, op-eds, or letters to the editor.

We would also like to help promote and share any events Coalition members are planning—regardless of how small or big the action—everything counts! You can keep up to date on these actions by following the Coalition on Facebook and Twitter.

 [Facebook.com/nmtccoalition](https://www.facebook.com/nmtccoalition)

 [Twitter.com/nmtccoalition](https://twitter.com/nmtccoalition)

Contact Ayrienne Parks at [ayrienne@rapoza.org](mailto:ayrienne@rapoza.org) or 202.393.5225 for assistance. We look forward to hearing from you.

### *Where Can I Find the Congressional Calendar?*

The Congressional Calendars can be viewed online at <http://www.cq.com/pdf/4995406.pdf?0>

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# Show The NMTC At Work

*Invite your Senators and Representatives to visit a project.*

Having a politician make an on-site visit to an NMTC-financed project is one of the most powerful things you can do to build a relationship and advocate for the Credit. By showing your Senators and Representatives first-hand the work that you do, how you serve your community, and how this federal programs supports your efforts, you can make a lasting impression. This is your opportunity to shine.

## Showcase Your Organization

- ◆ Always try to organize your event in such a way that your Senators and Representatives can speak to, and meet with, a significant number of constituents.
- ◆ Some ideas include inviting your Senators and Representatives to:
  - ◇ Meet your staff and members of the community that you serve.
  - ◇ Celebrate your organization or project's success at a ceremony and say a few words in support of your organization.
  - ◇ Receive an award from your organization for the good work that they have done in support of your cause.
- ◆ Connect the Dots. You are not only showcasing your organization, but the federal programs that support your work. This can help turn your Representative or Senator into a champion for the federal programs you rely on.

## Make it About the Member of Congress

- ◆ If your Senator or Representative responds strongly to business interests, be sure to have you event business focused and give the business owners a prominent role.
  - ◇ Ensure the business owner will speak to the necessity of the credit to make these projects possible.
- ◆ If your Senator or Representative is on a committee that addresses the needs of a special population, such as veterans, be sure that they are featured prominently on the agenda. In short, match your program to the interest areas of your Member of Congress.
- ◆ Personalize the experience by inviting a constituent who has benefited from the project can share a personal story of how your organization impacted their life.
  - ◇ Individual clients or local government leaders can put a human face on the work you do.

## Things to Remember Before and During the Visit

- ◆ What two or three points do you want to drive home with your elected officials? Make sure flyers, handouts, and remarks reflect those points.

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- ◆ Make a sign that says the business is financed by the NMTC. This is a great way to ensure the NMTC is on full-display and will help community members realize this too. It is a great tool for projects that are under construction too. If you need help with a template, contact us.
  - ◆ Determine what day is the busiest at the site where you have chosen to hold the event. This is the best time to hold the visit, since it will confirm the success of the project.
    - ◇ Invite your Senators and Representatives as far in advance as possible—they receive many invites every day, so make your invitation stand out. Let them know you are flexible and willing to accommodate the Member’s schedule. An invitation template is included on page 12.
    - ◇ When scheduling a meeting in the district or state, begin by calling that district or state office, as each office has a different system for scheduling. Tell them you live or work in the Member of Congress’ district, and ask them how to submit a formal meeting request. Some members require meeting and event requests to be in writing and submitted via fax or e-mail. Others require a web form be filled out, while some are fine with phone requests.
  - ◆ Maximize the value of the visit by inviting media to attend the event. Make sure the Member knows about the media’s involvement in advance and offer to coordinate with the Communications Director in the D.C. office.
  - ◆ Be sure to send information on the event to the NMTC Coalition and Rapoza Associates—we can provide assistance with invitations and planning as needed, as well as help promote the visit. In advance
  - ◆ During the visit, volunteer your organization to serve as a resource for their offices.

### Things to Remember After the Visit

- ◆ Send thank you letters, including any press releases, news articles, and photos from the event.
- ◆ Share photos and articles via email and through social media.
- ◆ Make sure that you provide the name, email address, and direct phone number of a person in your organization to serve as a constituent services liaison for the Congressional office.

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# Meet One-on-One with your Representatives

## *Keep NMTC in the Forefront of Their Minds*

A one-on-one meeting with your Senators and Representatives, or their staff, to discuss the issues carries much more weight than signing a petition, sending a letter, or making a phone call. Make your visit a success by following these pointers:

### Preparing for the Meeting

- ◆ **Know the politician.** Find out their background, information on the committees they're on, and other positions they hold that might be relevant. This information helps draw a direct link between the Senator or Representative and your advocacy efforts.
- ◆ **Focus on the NMTC.** You won't have time to deal with more than one issue well at the meeting; every additional issue that you raise will be less important to the representative or their staff.
- ◆ **Know the issue.** If you don't already know, learn the facts, figures, arguments, and counter-arguments surrounding the issue before your meeting. Knowledge is the cornerstone of advocacy.
- ◆ **Make it personal.** Sharing a real-life example of how your organization has impacted their district will put a human face on the work you do.
- ◆ **Call us.** We are here to help our members successfully frame the issues and understand them inside out. Our office can offer talking points, issue briefs, research, and specific information about the Senators and Representatives that you are going to meet.

### At the Meeting

- ◆ **Don't skip the preliminaries.** Introduce everyone present and their organizations. Thank the legislator for the opportunity to meet. Confirm how much time you have and respect those limits.
- ◆ **Designate one person as the lead speaker.** Cutting down on the number of people talking shows consensus, allows the Senator and Representative, and their staff, to focus on the message, and reduces the chances of getting sidetracked.
- ◆ **Listen.** Finding out their views is just as important as conveying yours. Ask genuine questions and respect their answers. They often contain valuable information.
- ◆ **Be clear and ask for what you want.** Don't walk away from a Congressional meeting without asking your Senators and Representatives to take the specific action that you want them to take.
  - ◇ If the Member of Congress is not a supporter of the NMTC permanency bills (S. 384 in the Senate; H.R. 1098 in the House), ask them to cosponsor the bill. Provide them with a current copy of the fact sheet on the NMTC bills.
- ◆ **End with thank you.** Regardless of the outcome, thank your Senators and Representatives for the opportunity to meet and raise your concerns. Don't forget to thank their staff as well.

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## **After the Meeting**

- ◆ **Follow up.** Send your Senators and Representatives a formal thank you, forward any additional information, and create a written confirmation of any agreed-to actions.

# Host a Community Roundtable

## *Partner with Local Organizations to Get Attention*

A Community Roundtable can be an important tool for getting the attention of federal lawmakers, informing them about community and economic development issues, garnering media attention, and demonstrating the strength of a community's stance. Host your own meeting with a Senator or Representative by taking the following steps:

### **Planning Stage: Form a Planning Committee with Other Local and State Groups**

- ◆ The more local and state partners you work with, the better your chances of getting your Senators and Representatives to attend.
  - ◇ Nothing creates a more powerful incentive than having your event supported by a broad (and large) swath of community stakeholders.
  - ◇ Invite your Board of Directors, clients, staff, and others who are committed to the work you do and who can share a personal story of how your organization has impacted their life.
- ◆ Call us and let us help you lay the groundwork.
  - ◇ Will you have a specific theme like business, education or healthcare? You can also keep it more general to show the flexibility of the NMTC.
  - ◇ There are other organizations across the nation who share your passion about strengthening local communities. We can help you find like-minded organizations in your area to partner with and help your planning committee organize the event.
- ◆ Decide whether this will be a roundtable that is open to the press. If so, contact the Coalition for tips on how to work with your Member of Congress' communications staff and your local media.
- ◆ Thank everyone for coming. Always have attendees fill out a sign-in sheet with their name, phone number, address, and email address. Contact information will help you follow up with people after the event to let them know what's happening on the issues that were addressed.

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# Short on Time?

## *You Can Still Make a Difference*

### **Do you have 5 minutes?**

- ◆ Write a message on your elected officials' Facebook or Twitter pages using **key messages** (page 10) on the NMTC—and encourage others to share. Include **state-specific information** when you craft your short message (NMTCC Website, Under Advocacy and State Fact Sheets). You can also share links to the **NMTC at Work Video** (NMTCC Website under News/Video Vault) and the **2016 NMTC Progress Report** (NMTCC Website under The Credit/Reports & Case Studies).
  - ◇ Example tweets:
    - ⇒ @RoyBlunt #NMTC created 750k jobs in low-income communities. Read the 2016 Progress Report to find out more: <http://nmtccoalition.org/wp-content/uploads/NTMC-Coalition-Progress-Report-2016.pdf>
    - ⇒ @SenSchumer the #NMTC has helped provide needed financing for 199 NY businesses: <http://nmtccoalition.org/wp-content/uploads/state-profiles/New-York.pdf> #econdev
  - ◇ Example Facebook posts (Be sure to tag the member's official Facebook account):
    - ⇒ Send a video with a note. Thanks Rep. Pat Tiberi for your support of the NMTC. The Muskingham Rec Center, which is featured in this video, is a great example of how the NMTC is helping the district. <https://www.youtube.com/watch?v=073kCOQOgt4>
    - ⇒ Share a photo from a recent project: Sen. Isaakson the NMTC is making a huge difference in Georgia. For example, the opening of Premium Peanut this spring was made possible through NMTC financing. The shelling facility is located in an area of Douglas, Georgia with a poverty rate of almost 30 percent and an unemployment rate above 9 percent. The plant will create approximately 100 direct jobs, plus an additional 30 indirect jobs at the storage facilities. The majority of direct jobs will be unskilled positions available to low-income individuals and all will pay a living wage for single adult in the county and include benefits. (Attach this short summary to a compelling photo).

### **Do you have 15 minutes?**

- ◆ Send a letter or email to your Senators and Representatives urging them to secure the NMTC. **Use our Coalition sign-on letters as an example** (NMTCC Website under Advocacy/Sign-On Letters).
- ◆ Share the link to the **NMTC at Work Video** (NMTCC Website under News/Video Vault) with your local media person who covers economic policy, community development or national policy. Send them a state fact sheet, a photo of a recent local project, and be sure to note if your Congress Members are supportive and cosponsors of the NMTC bills.



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## Do you have 30 minutes?

- ◆ Write a Letter to the Editor
  - ◇ A Letter to the Editor is typically very short, around 200 words, and in response to a to an article the media outlet recently published. **Read tips on how to write and submit it** (page 11).

## Do you have an hour?

- ◆ Write an Op-Ed
  - ◇ Submitting an opinion piece to your local or state press is a great way to bring attention to the impact of the NMTC in your community. Highlight the projects and the effect the Credit has had on economic growth as well as creating and retaining jobs where they are needed the most. **Find out how to write and submit it** (page 11).
- ◆ Create a short video
  - ◇ Seeing is believing. Create a video about a great NMTC-financed project by interviewing a local leader, business owner, and an individual from the community. Then send it to your Representative and Senators—don't forget to **share it with us too and we'll help you spread the word.**

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# Talking About the NMTC

## *Key Messages on the Credit*

**The NMTC is a proven incentive that spurs private sector investment in low-income communities—growing local economies and creating jobs in places that need it the most.**

- ◆ Over the last 30 years, federal spending on community development, as measure as a share of GDP has fallen by 75%—meaning this effective financial tool is more important than ever.
- ◆ 100% of NMTC investments go to distressed communities and more than 72% go to communities in extreme distress.
- ◆ The Credit delivered an unprecedented level of investment to economically distressed rural and urban communities, leveraging over \$80 billion in capital between 2003 and 2015, directly creating more than 750,000 jobs, at a cost per job of less than \$20,000.

**The NMTC is a unique and flexible incentive.**

- ◆ The Credit does not target a specific type of business or sector. Instead of Washington picking winners and losers, the NMTC places the project underwriting responsibility with community development organizations with deep ties to the communities in which they work.
  - ◆ The NMTC is the only incentive that provides both the flexibility to finance a variety of businesses and projects in these communities as well as an effective, established system to deliver that financing.

**The NMTC is a cost effective tool that pays for itself.**

- ◆ There is also substantial evidence that the cost of the Credit is fully offset by the federal income tax revenue generated by businesses and jobs benefiting from New Markets investments.
  - ◆ For every dollar of revenue forgone through the NMTC, eight dollars of investment flows to economically distressed communities lacking access to traditional capital streams. (*New Markets Tax Credit Economic Impact Report*, December 2014)

**MOST IMPORTANTLY** share how one of your local projects has helped a business in your area, and created jobs. Don't forget to explain how the project benefitted the community at large.

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# Share NMTC Success Locally

## *Write an Op-Ed or Letter to the Editor*

Submitting an opinion piece to your local or state press is a great way to bring attention to the impact of the NMTC in your community. Highlight the projects and the effect the Credit has had on economic growth as well as creating and retaining jobs where they are needed the most.

Editors do not publish every letter or op-ed, but they do pay attention—especially if it is well-written and timely. A Letter to the Editor is typically very short, around 200 words, and in response to a to an article the media outlet recently published. An op-ed is a longer opinion piece that provides information on a subject that would be of interest to the outlets readers. Therefore it is important to demonstrate how the issue affects individuals locally. To find out how to submit a Letter to the Editor either call or look on the outlet’s website.

- ◆ **Be timely.** Local outlets may not be consistently writing about tax reform, but they may be talking about the economy, jobs and other types of services that are related to types of projects being financed by NMTC. This makes it easier to find an article and relate it to concerns about the future of the NMTC. The budget, unemployment, and the health of the economy can also be used as a lead-in.
- ◆ **Follow the rules.** Make sure to adhere to the outlet’s guidelines on length. Spell everything correctly and pay close attention to grammar—letters are not usually edited, rather the outlets select well-written letters that meet their guidelines. Include your name, full address, and phone number.
- ◆ **Be concise.** Include your main points in the first paragraph even if your media outlet length guidelines are greater than 200 words. Two to three points are ideal.
- ◆ **Avoid jargon and acronyms.** Explain points in “plain English.” This makes the information more understandable and accessible to a wider audience.

Email your letter to insure timeliness. To do this, paste the text into the body of an email—DO NOT SEND AS AN ATTACHMENT. You may also fax it, but sending it electronically is generally the preferred way to receive letters.

Lastly, be sure to copy us or forward your submission and we will have our PR Firm follow up on placement. Remember, we are here and happy to help!

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# Seeing Is Believing

## *How to Invite Your Member to Visit a Project*

[DATE]

The Honorable [NAME]

US House of Representatives/U.S. Senate

[ADDRESS]

Washington, DC 20515

Dear Representative/Senator [LAST NAME]:

Tax reform, the economy and jobs continue to be a top priority for Congress and the people they represent. Often though, most of these policies' effects are hard to see in terms of real impact on businesses, communities, and individuals. The New Markets Tax Credit (NMTC) is one policy that is making a tangible impact on our local economy in [STATE], as well as around the country. It is driving capital to rural communities and urban neighborhoods through public-private partnerships, leveraging over \$80 billion in investments and creating over 750,000 jobs since its inception. To better illustrate this point, I would like to invite you to tour [PROJECT], an NMTC-financed project located in [CITY], to hear from [local business/constituents/local officials] about the difference this financing has made in the community and in their lives.

[PROJECT] is just one example of the impact the New Markets Tax Credit has in communities throughout [STATE]. The NMTC has provided [\$X] in investments and leveraged more than [\$X] in total capital to businesses and economic development projects. These investments have directly created well over [XXXX] jobs in our state.

[COMPANY] would be honored if you would join us for tour and discussion on tax reform and its effect on the people of [STATE]. We would like to invite you to join us from [TIME, e.g. 8:00-9:30 am on DATE]; but we are flexible if there is another time that would work better for your schedule. [DESCRIBE WHAT S/HE WILL SEE, I.E. We would give you a tour of our facility and provide time for you to meet some of our employees.]

I will follow up this request with your office or you may reach me at [PHONE/EMAIL].

Thank you for your attention and we hope to see you here soon.

Sincerely,

[YOUR NAME]

[TITLE]

[COMPANY]

[WWW.NMTCCOALITION.ORG](http://WWW.NMTCCOALITION.ORG)