



NEW MARKETS TAX  
CREDIT COALITION

# In-District Advocacy Toolkit

## Take Advantage of Time At Home

Build a Meaningful Relationship

With Your Senators and Representatives

### **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, 10 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

The longest Congressional Recess takes place in August. This five-week period is the longest break that Members of Congress will be in their states and districts throughout the year, but it is not the only opportunity to interact with your legislators at home. There are several smaller breaks throughout the rest of the year when you can take action in your area. Upon returning to Washington this September, Congressional tax-writing committees are preparing to take up comprehensive tax reform legislation.

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 take advantage of upcoming in-district periods and show their Senators and Representatives 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 and local officials leave a large and lasting impression of the effectiveness of the Credit.

In this toolkit, you will find tips on three powerful actions that can 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 them 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 town hall meeting.** Partner with other local organizations and inviting your Senators and Representatives to discuss the issues.

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 this August 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.**

Thank you for your advocacy.

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## We Can Help!

### Get Support On Your In-District Activities

We are ready to provide NMTC Coalition 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.!

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.gpo.gov/fdsys/browse/collection.action?collectionCode=CCAL>

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# See 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 it 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.
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## 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.
- ◆ Determine what day is the busiest at the site where you have chosen to hold the event? This is when you will want to try 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.
  - ◇ Fax or Email the invite to both the office in DC (attention scheduler) and to the local office. Follow up with the scheduler after a few days.
- ◆ 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 Rapoza Associates,—we can provide assistance with invitations and planning as needed and 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 one issue. 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.
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- ◆ 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.

### 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 Town Hall Meeting Partner with Local Organizations to Get Attention

Town hall meetings are an important tool for getting the attention of federal lawmakers, informing your neighbors about the issues, garnering media attention, and demonstrating the strength of a community's stance. Host your own town hall 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 voters. Remember that constituents always matter!
    - ◇ 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.
    - ◇ 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, help your planning committee organize the event, and invite media to attend.
  - ◆ Use social media to garner additional participation and raise the profile of your Town Hall meeting. Need ideas—ask us and we will provide you with social media best practices for this type of event.
  - ◆ 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](#) on the NMTC—and encourage others to share. Include [state-specific information](#) when you craft your short message.
- ◆ Sign on to the [NMTC Support Letter](#). Then send an email asking others to do the same, including local officials, organizations, and businesses that have benefitted directly or indirectly from the credit.

### Do you have 15 minutes?

- ◆ Send a letter or email to your Senators and Representatives urging them to secure the NMTC. [Read an example letter here.](#)

### 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.](#)

### Do you have an hour?

- ◆ Attend a town hall meeting.
    - ◇ If you don't have the time or resources to arrange a town hall meeting, you can still use someone else's as an opportunity to engage your Senators and Representatives. Visit your legislators' websites to find out the time and date of any upcoming town hall meetings.
    - ◇ Don't be afraid to stand up and ask questions. Make your questions precise and direct! [Contact us](#) if you want help crafting questions.
  - ◆ 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.](#)
  - ◆ 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 70% go to communities in extreme distress.
- ◆ The Credit delivered over \$60 billion in capital to economically distressed rural and urban communities between 2003 and 2013, directly creating over 550,000 jobs, at a cost per job of less than \$20,000.
- ◆ If not for the incentive of the Credit, 88 percent of NMTC investors would not have made their investments (According to a 2007 U.S. Government Accountability Office (GAO) report).

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

- ◆ Instead of Washington picking the winners and losers, the decision-making and project underwriting are the responsibility of 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 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 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 2012)

**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.** Most outlets are writing about tax reform, so it shouldn’t be difficult to find an article to relate 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 discussions are dominating much of the policy conversations in Washington and we want to draw your attention to the impact the New Markets Tax Credit (NMTC) has had on local economies in low income urban and rural communities in [STATE]. 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].

[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]

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