ADVOCACY ACADEMY

THE ESOP ASSOCIATION

ADVOCACY TOOLKIT

HOW TO HOST YOUR ELECTED OFFICIALS



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The ESOP Association Government Relations & Public Affairs
esopadvocate@esopassociation.org

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Dear TEA Member,

Storytelling is powerful. People won't often remember facts, but they will remember a story. The story of your ESOP is important – it's about your retirement security, about helping your company compete, about a model that helps employee owners grow and succeed as a workforce, and about keeping jobs local to provide economic stability in your community.

But does your Member of Congress know that story? Your Senator? Your Governor?

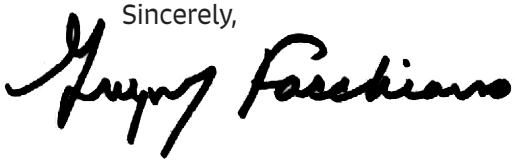
The ESOP Association has created this toolkit to help you share your story with them. Why? Though the history of employee ownership dates to the founding of our country, modern ESOPs were largely a creation of federal policy starting in the 1970s. Their continued existence and success, therefore, rely on sound federal policy. Similarly, ESOPs can be promoted in a state by a knowledgeable governor or state legislature. Simply put, sharing your story helps inform elected officials and motivate them to take action.

We've designed this toolkit to walk through the simple steps to successfully host an elected official at your ESOP or ESOP Association chapter event, and we hope you'll take advantage of it. The ESOP Association staff stand ready to assist you.

Hosting an elected official at your company or chapter event is a powerful, easy, and often fun way to share your story and hear the latest news on legislation affecting employee ownership. It's an opportunity to explain not just the valuable services and products you provide, but the fact that it's driven by something different -- employee ownership.

If you believe in employee ownership and the advantages ESOPs provide for both employee owners and employee-owned companies, take a moment to review this toolkit and then get started with your own event soon. We look forward to helping you share your important story.

Sincerely,



Gregory Facchiano
Vice President of Government Relations and Public Affairs

Simple Steps to Invite and Host Your Elected Official(s)

1. Requesting the Meeting/Visit

Make it official with an invite letter

- Use The ESOP Association staff as a resource for proper formatting, delivery, and contact information
- Address to the Member, send to District and DC Staff Contacts

Include the basics

- **Who** – describe who you are; how long you've been in business, how many businesses/employees are chapter members
    - TEA can provide information on how many ESOPs are in the Member's district and other useful data
- **What** – the purpose of a visit; lay out what the Representative / Senator would see or do; the topics discussed during a visit
- **When** – offer some options during a Congressional recess or a "hook"
    - October is Employee Ownership Month
    - August is Congressional recess
    - Present them with a "Champions" award if applicable
- **Where** – provide address of visit
- **How** – contact information for staff to follow up

Follow up at appropriate times

- Follow up with a phone call for maximum efficiency
- Be ready to answer questions
- Be flexible with the Member's schedule. A private appointment may be proposed to you as an alternative to a site visit.

Tip: *If your Representative can not make it, invite the District Director of Field Representative instead. Fostering a good relationship with staff is often very important and can be very effective.*

2. Make the Meeting/Visit Happen

Arrangements

- **Determine One Point of Contact** – easier for both parties
- **Understand Member's Time** – be flexible if needed
- **Identify Needs to Help ESOPs Improve**
    - TEA's Government Relations team can help provide specific policy asks and materials
- **Dedicate Space** – parking and pre-determined place for Member to settle

Media

- **Ask the Member's office about press**
    - Let them do it – they deal with the media every day
- If you cannot have press onsite or something specific cannot be photographed, simply be upfront

Materials

- **Provide briefing material**- Content helps you control the narrative and builds confidence you are worth a meeting and continued relationship. In a briefing memo, include the following information:
    - Purpose of visit
    - Background on business or chapter members and issues being covered
    - Meeting attendees
    - Short bios of key leaders or others involved in visit
    - Sequence of events
    - Will the Member be asked to give remarks? If so, explain whether they will have a microphone, stage, who and how big the audience is, etc.

3. Capitalizing on the Meeting/Visit

- Send a thank you note to the Member
- Include any follow up information requested or reiterate a point
- If given a staff contact, also separately send a note
- Offer to be a future resource
- Work with The ESOP Association after the meeting
    - This information is crucial to TEA staff when planning future efforts and ensures TEA's message is consistent

Meeting Dos and Don'ts

Do:

- ☑ Respect their time
- ☑ Be organized
- ☑ Avoid temptation to "over talk"
- ☑ Leave them with ability to say "I visited "X" in my district and they [do a great job at...] or [they need this...]"
- ☑ If planning to give the Member something or ask to wear anything, run it by staff first

Don'ts:

- ☒ Talk about campaign or political things – like Political Action Committees "PACs"
- ☒ Complain about a policy without offering a solution/ alternative - what needs to happen?
- ☒ Bait & Switch – stay on message from what invite said

Additional Resources

- Prepare for your visit or meeting by reviewing **TEA's Advocacy issues** and by coming prepared with information on your company to help make these meetings as effective as possible.
- Don't forget to learn more about your Representative or Senator and see if they **have supported us in the past.**
- Check out how The ESOP Associations formats its **Advocacy Day meetings** to get the most out of your meeting.

CONTACT THE ESOP ASSOCIATION

Please reach out to The ESOP Association Staff with any questions or comments about ESOP Advocacy.

Greg Facchiano
Vice President, Government Relations & Public Affairs
gfacchiano@esopassociation.org

Patrick Russo
Director of Public Policy
prusso@esopassociation.org

In-District Request for Site Visit—Sample Letter

Your Company's Letterhead

Date

The Honorable Senator/Representative
Attn: Scheduler
Street
City, State ZIP

Dear [Representative or Senator] [Last Name]:

I am a constituent and [Your Job Title] at [Company Name] from [City]. [Mention your connection to employee ownership, i.e. Since 2010, our company has been employee owned and we have over 70 employee owners.] I am writing to invite you and your staff to visit our office next month when you are home or the next time you are in the district. [Feel free to be specific if you have an event already in mind.]

[Company Name] is just one of the more than 6,500 employee-owned companies in the United States, representing more than 10 million employee owners nationwide. As you may know, ESOPs provide unique benefits to the employee owners, the institutions, and the surrounding communities that they are involved in. I would greatly appreciate the opportunity to introduce you to our employee owners and to give you a tour of our facility to show you the impact our employee owners have in your district.

Thank you in advance for your consideration of this meeting. If you or your staff have any questions, or would like to discuss details, please feel free to contact me at [Phone Number] or [Email Address].

Thank you.

Sincerely,
[Name and Company]

In-District Request for Meeting—Sample Letter

Your Company's Letterhead

Date

The Honorable Senator/Representative
Attn: Scheduler
Street
City, State ZIP

Dear [Representative or Senator] [Last Name]:

I am a constituent and a [Your Job Title] at [Company Name] from [City]. I would like to request an opportunity to meet on [Date] or perhaps another date that works for you to discuss issues related to employee ownership. My colleagues [list others here who plan to attend the meeting] are planning to participate as well. I/we are happy to visit with you in your district office or other location.

[Company Name] is just one of the more than 6,500 employee-owned companies in the United States, representing more than 10 million employee owners nationwide. As you may know, ESOPs provide unique benefits to the employee owners, the institutions, and the surrounding communities that they are involved in. I would greatly appreciate the opportunity to discuss with you the important impact our employee owners have in your district.

[Feel free to add information about your company and the issues you wish to discuss here.]

Thank you in advance for your consideration of this meeting. If you or your staff have any questions, or would like to discuss details, please feel free to contact me at [Phone Number] or [Email Address].

Thank you.

Sincerely,
[Name and Company]

Chapter Event Invite—Sample Letter

Your Company's Letterhead

Date

The Honorable Senator/Representative
Attn: Scheduler
Street
City, State ZIP

Dear [Representative or Senator] [Last Name]:

I am the President of the [Chapter Name] of The ESOP Association, representing (X Number) employee-owned businesses from [Member's State or Congressional district]. I am writing to invite you to speak at our upcoming chapter event at [Location] on [Date] to discuss the important work you are doing in our nation's Capital and issues related to employee ownership. The over [Number] attendees would be honored to have your perspective.

[Chapter Name] members are a portion of the 6,500 employee-owned companies in the United States, representing more than 10 million employee owners nationwide.

As you may know, ESOPs provide unique benefits to the employee owners, the institutions, and the surrounding communities that they are involved in. I would greatly appreciate the opportunity discuss support for employee-owned businesses and the impact our employee owners have in your district.

[Feel free to add information about your Chapter and the issues you wish to discuss here.]

Thank you in advance for your consideration of this event. If you or your staff have any questions, or would like to discuss details, please feel free to contact me at [Phone Number] or [Email Address].

Thank you.

Sincerely,

[Name and Chapter Name]

NOTE: Feel free to have several chapter officers or sign, including TEA staff or PPC members.