



NARFE
FEDERAL BENEFITS EXPERTS

**Federation Legislative Chair, Congressional District
Leader and Senatorial Leader Guide**

OVERVIEW

The National Active and Retired Federal Employees Association's (NARFE) primary mission is **ADVOCACY**. This entails protecting the earned pay, rights and benefits of all federal/postal employees, retirees and annuitant survivors. In fulfilling its mission, the Association relies on members at the federation level to serve as legislative chairs and Congressional District Leaders/Senatorial Leaders (CDLs/SLs) to work with members of Congress and their staff. For the purpose of this document, the terms CDL and SL will be used interchangeably.

The cornerstone of an effective national legislative advocacy program is grassroots actions by its members. Members serving as legislative chairs or CDLs/SLs must be fully committed to performing the tasks and responsibilities required to ensure continuous engagement with their member of Congress. Individuals serving in name only hinder efforts to protect members' earned benefits and pay. This document provides NARFE Advocacy Leader Guidelines which will help federations enhance their advocacy activities:

- ◆ *Duties and Responsibilities of NARFE Legislative Chairs* describes the responsibilities of NARFE members who hold legislative chair positions at the federation and chapter level.
- ◆ *Support for NARFE Federation Legislative Chairs* lists helpful resources for federation legislative chairs.
- ◆ *Establishing Congressional District Leaders* explains “why” each state should establish and maintain a strong advocacy program using CDLs/SLs. It also serves as a primer for newly elected federation presidents in their role in NARFE's national advocacy program.
- ◆ *Responsibilities of an Effective Congressional District Leader* covers “what” the required prerequisites are for members to serve as CDLs, as well as their duties and responsibilities.
- ◆ *Congressional District Leader Best Practices* describes “how” successful CDLs go about performing their duties using time-proven best practices for establishing a strong working relationship with members of Congress and their staff.
- ◆ *How to Identify Potential NARFE Advocacy Leaders* identifies “who” should be recruited to serve as a CDL based on personal attributes, knowledge and skills. When CDL/SLs are meeting with members of Congress, they are the face of NARFE. Consequently, the association depends on them to make favorable and

lasting impressions. In addition, this section provides suggested ways to identify potential CDLs.

For questions or more information, including scheduling CDL/SL training, please contact the Advocacy Department at advocacy@narfe.org.

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Duties and Responsibilities of NARFE Legislative Chairs

Every NARFE member plays a significant role in NARFE's legislative outreach. As your federation and/or chapter legislative chair, you are the focal point for legislative action and know-how for your chapter or federation. You serve as a liaison between your members, your federation leadership, your elected officials and NARFE's Advocacy Department, providing expertise and direction for members, motivating them and coordinating effective grassroots action.

As a NARFE legislative chair, you are responsible for:

- Providing legislative updates to NARFE members at chapter and federation meetings and through newsletters;
- Motivating NARFE members to participate in grassroots advocacy;
- Familiarizing yourself with NARFE's Advocacy Program and positions on pending legislation;
- Keeping up to date on congressional and NARFE's legislative activities;
- Personalizing messages to congressional staff instead of sending general advocacy messages; and
- Working with other legislative chairs in your state.

Legislative chairs in states with a CDL structure should work with CDLs to:

- Build relationships with members of Congress and their staff, including at least two annual meetings with the congressional office(s);
- Reach out to congressional offices to provide updates on NARFE's legislative priorities;
- Prepare grassroots activities in which NARFE members can participate; and
- Update your federation and the NARFE Advocacy Department about your legislative outreach.

At the **chapter level**, you also should work with your CDLs and fellow chapter legislative chairs in the area so you can plan joint events. You also should work with your federation legislative chair to ensure that work isn't being duplicated.

At the **federation level**, federation legislative chairs should be the primary contact for senators' offices if your state does not have Senatorial Leaders (SLs), and work with chapter legislative chairs and CDLs to make sure they have the resources necessary to be successful.

Support for NARFE Federation Legislative Chairs

Federations have different ways of supporting their legislative chairs. While some smaller federations might not need an entire team of advocates, federations might find that delegating some of the outreach is not only easier for the federation legislative chair, but also helps encourage participation by members and develops a willingness to take on a leadership position. Because the federation legislative chair is responsible for reaching out to grassroots activists and NARFE members, having “deputies” can help in that effort. Additionally, it will ensure federation members know what is going on in the state and help update the other federation leaders and NARFE Headquarters. The following may be of assistance to federations:

- **Legislative Committee** – The committee is composed of a representative of each congressional district with a chairperson selected from the committee. Sometimes the chairperson is the federation’s legislative chair, and sometimes a separate person is elected to serve as the committee chair (i.e., federation vice president). In states where a CDL structure is not utilized, the committee is responsible for carrying out NARFE’s grassroots agenda, and reaching out to congressional offices on behalf of the federation.
- **Congressional District Leaders** – Similar to a legislative committee, Congressional District Leaders are responsible for reaching out to a specific congressional office and reporting activities to members living in the congressional district.
- **Area or District Representatives** – Some federations have area or district vice presidents responsible for legislative outreach, while others have individuals specifically tasked with legislative outreach on behalf of the NARFE members within a certain geographical boundary.

Regardless of how your federation is organized, establish a clear communications path. Know how you can reach the NARFE members, and make sure the members can reach you. Have written expectations for those carrying out advocacy activities. Sometimes, a phone tree can be useful – especially in urgent situations such as an upcoming vote.

Establishing Congressional District Leaders

NARFE members, through approval of a resolution at the 2016 National Convention and in the 2017 Strategic Plan, have embraced establishing Congressional District Leaders (CDLs) and Senatorial Leaders (SLs) within their federations. This guide covers why your federation should establish CDLs and SLs.

First, the basics: What is a CDL/SL?

A Congressional District Leader (CDL) or Senatorial Leader (SL) is a NARFE federation position. The NARFE member in this position serves as the main point of contact between a member of Congress' office and the NARFE members within that congressional district or state (for senators). In short, they act as a liaison between the congressional office and the NARFE chapters and members in the district or state.

Why should my federation establish CDLs/SLs?

By dedicating one person to serve as the liaison between NARFE members and a congressional office, NARFE's grassroots efforts are streamlined, more professional, efficient and consistent in messaging.

When surveyed, members of Congress and their staff have consistently reported that having one local point person on the ground is the most effective way to get views across and persuade members of Congress to take action.

Building and maintaining relationships with congressional staff is critical to advancing NARFE's priorities. When the staff knows whom to contact within NARFE, they are more likely to reach out in advance of legislative action. Congressional staff have often told NARFE lobbyists that they've been in contact with many NARFE members, and they don't know who to proactively contact as a result. It's too confusing and overwhelming.

By creating a CDL/SL structure, a federation will streamline advocacy efforts and strengthen NARFE's message on Capitol Hill. By being more efficient in our advocacy efforts, NARFE will be more effective in protecting and enhancing the earned pay and benefits of its members. By working directly with a congressional office and the NARFE Advocacy Department staff, a CDL also will ensure every chapter and every member within a congressional district is receiving the same information regarding NARFE's advocacy efforts and priorities.

How can my federation financially support CDLs/SLs?

NARFE federation 10 Percent Funds are a great way to reimburse CDLs/SLs for postage and other expenses. By providing reimbursement, you're likely to receive greater interest in volunteering to serve as a CDL/SL from federation members.

Responsibilities of an Effective Congressional District Leader

The goal of a CDL/SL is to develop and strengthen a relationship with your member of Congress and his/her staff to further the NARFE Advocacy Program. This guide builds on the previous guide on [establishing CDLs](#) and covers the necessary prerequisites and job duties of an effective CDL/SL.

Required Prerequisites to be an Effective CDL/SL

- Be a constituent living in the congressional district/state.
- Have an established email address and ready access to the internet.
- Be familiar with NARFE's Legislative Action Center and its products.
- Possess a basic understanding of the legislative process.
- Have strong oral and written communication skills, including:
 - Being able to stay focused and on message.
 - Communicating the NARFE position succinctly.
 - Being comfortable meeting with and talking to people.
- Be polite and assertive without being aggressive.
- Remain nonpartisan and leave your personal opinions at the door to focus on NARFE legislative priorities and positions.
- Be willing to work with NARFE Advocacy Department staff, participate in training seminars and receive guidance to advance your skills.

Job Responsibilities Duties of an Effective CDL/SL

- Keep current on NARFE top issues and advocacy positions. This requires regular check-ins with the NARFE Advocacy staff.
- Hold at least one face-to-face meeting annually with your congressional office on NARFE's priorities. Limit each discussion and handouts to no more than three items.
- Work directly with the NARFE Advocacy Department in advance of any meeting with congressional offices.
- Send or email thank-you letters after meetings and provide other recognitions for support when appropriate.
- Email the staff members of your representative or senator periodically on relevant and timely issues to work towards building a strong relationship.
- Invite your representative or senator and his/her staff to speak at federation and chapter meetings annually.
- Be ready to respond to NARFE Advocacy alerts with telephone calls and/or emails in a timely manner. Calls are best suited for when significant and timely issues arise.
- Report any significant interactions with the congressional office to the NARFE Advocacy Department via the [Congressional Meeting or Event Feedback Form](#) in the Legislative Action Center.
- Follow up on any commitments you make during the meeting.
- Regularly attend town hall meetings and other community events where the member of Congress and/or his/her staff will be in attendance. Face-to-face time with the legislator is most likely to occur at town halls and community events, not congressional meetings. Seek out these opportunities and invite NARFE members to join you.
- Sign up for the legislator's official congressional newsletter and campaign distribution list.
- Work with the chapter presidents and legislative chairs in the district to coordinate efforts and keep them apprised of interactions with the legislator's office. Make sure they are aware of your efforts and vice versa. Collaborate to the extent possible.
- Remember that legislation and politics are separate entities, and do not discuss political issues, such as the legislator's campaign, opponent, and NARFE-PAC contributions, while in the official government congressional office. This includes written correspondence. Unsure if something is appropriate to say? Err on the side of caution and do not say it.

Congressional District Leader Best Practices

The goal of a CDL/SL is to develop, maintain and strengthen a relationship with your member of Congress and his/her staff to further the NARFE Advocacy Program. Your NARFE federation established a CDL/SL structure, and you're now serving as a NARFE CDL or SL. You've reviewed your duties, are honing in on your skills and are working with your congressional office regularly. Here are some best practices to take your advocacy efforts to the next level. This guide builds on the previous guides on [establishing CDLs](#) and [responsibilities of an effective CDL](#).

Have an “ask” and define your message carefully. Don't communicate with a congressional office only for the sake of communicating. Whether it's a meeting, an email or a phone call, have a clear “ask.” Keep your ask simple, clear and specific, and include the action you would like your legislator to take. This can be vocal opposition to a policy proposal or co-sponsorship of a bill NARFE supports. Clear, concise messages are more likely to be remembered and considered by the legislator. Use the materials on the NARFE Advocacy [webpage](#) to structure the message.

Set the tone. Make sure the member of Congress and his/her staff are aware of NARFE's legislative priorities and what you plan to discuss prior to any meeting. Send materials to the staffer before the meeting so he/she can be prepared to talk about the legislator's position.

Utilize various communication channels. Recognition of NARFE's position can be strengthened through social media, email messages, and calls from NARFE advocates throughout the state or district. Ask other NARFE members to use NARFE's Legislative Action Center to contact their legislators about the issues. If NARFE members from across the district/state are contacting the legislator, your meeting will strengthen those messages and elevate NARFE's voice.

Humanize the issues. Include a personal story in any correspondence to help influence your legislator to support NARFE's legislative priorities and explain first-hand how you or other constituents would be affected by the legislation you discuss. When holding a meeting, bring another NARFE member with a compelling personal story.

Ask for the staffer's card, and have your own NARFE card handy. When introducing yourself to the staff person who works on federal issues, ask for his/her business card. Usually the best way to contact congressional staff is via email.

Wear your NARFE name badge and provide your business card when meeting with a congressional office or attending a community event in your NARFE capacity.

Use the phone when time is of the essence. Although emails are preferred for day-to-day communication, pick up the phone to discuss urgent matters when legislation is being considered.

Arrange some meetings when Congress is not in session. You will likely have more of the legislator's time and attention when he/she is in the district/state.

Don't be afraid to say "I don't know." Let the congressional staff know you will get back to them on any question for which you do not immediately have an answer. This is preferable to guessing and possibly supplying an incorrect answer.

Follow up after every meeting. Send a thank-you note after your meeting, and take that opportunity to answer any outstanding questions.

Organize a coordinating and communication structure. Create a communications system that allows you to send information to NARFE members and mobilize action quickly around the district/state. Building a network of advocates helps to target your messages and actions most effectively. Engage the chapter legislative chairs and other activists in the district/state to build a structure that works for you. One size does not fit all.

Know the key issues inside and out. This includes not only the position you are advocating, but the other side too. Know the congressional committees with jurisdiction over the issue, as well as the members of Congress who support NARFE's position and those who don't. Knowing the arguments against your position will not only help you prepare your case, but help you inform your legislator. Staff will often ask, "Where's the objection to what you're proposing?" Knowing how to answer that question shows the staff you take the issue seriously.

Familiarize yourself with the legislator's background. Review his/her biography and see if there's any way to build a connection. Maybe you grew up in the same general area, or went to the same school. Also, take note if the legislator has prior government experience at any level. Know his/her committee assignments and look for ways to connect your issue to the interests of those committees, as committee assignments usually reflect the legislator's interests. Use [NARFE's Legislative Action Center](#) to learn about your legislator's background.

Rally your allies. Recruit and organize other supporters of NARFE's position including individuals, organizations and agencies who are affected by the same policy. This includes vocal NARFE members and other organizations.

Be patient. Successful advocacy does not happen overnight. Building support for an issue takes time and effort on behalf of lobbyists, NARFE members, congressional staff and other stakeholders. Getting a piece of legislation through Congress takes time. Success should also be judged on whether the needle was moved or if the narrative changed, either of which may be the best result.

How to Identify Potential NARFE Advocacy Leaders

Finding new advocates to take on NARFE leadership roles can be challenging. This guide serves to assist Federation Presidents and Legislative Chairs recruit members who are willing to devote time and effort to serve as Congressional District Leaders/Senatorial Leaders (CDL/SLs) representing NARFE in meetings with their members of Congress. NARFE is looking for individuals who are committed to performing the duties of this essential and critical position; without them, there is no advocacy program. Here are some ideas to get you started in identifying and choosing advocacy leaders.

- 1) Federation Presidents and/or Legislative Chairs should start by reviewing chapter legislative chairs and presidents as well as CDLs/SLs across the state:

- a. Who actively volunteered for their current position?
 - b. Determine those who have proven to be capable (organizing meetings, working with legislators, etc.).
 - c. Does anyone have strong relationships with a member of Congress (MOC)?
 - d. Report your findings to the Advocacy Department.
- 2) The Advocacy Department can review the Congressional Meeting or Event Feedback Form responses. Which members who don't currently hold a leadership position reported an activity?
 - 3) The Advocacy Department can use the Legislative Action Center to collect names of those who contact legislators on most of NARFE's legislative priorities. Contact these individuals to ask which issues they are most interested in and why, and also ask about their interest in becoming a leader. Then, depending on responses, identify those who are interested in leadership roles.
 - 4) Send new NARFE members information about how to get involved and help them develop an understanding from the beginning that NARFE federations are run by leaders. Explain the types of positions available and ask if they would like to learn more about becoming a NARFE leader. The Advocacy Department can help you craft this message.
 - 5) Spotlight leaders who are excelling in their position. Determine a way to measure this so others aren't upset they weren't chosen. Spotighting leaders may help inspire other NARFE members to take on leadership roles, especially if these roles are perceived as being not too time-consuming.
 - 6) Using the background documents prepared by the Advocacy Advisory Committee and the Advocacy Department, publish articles seeking volunteers for your vacant CDL/SL positions. These articles should be placed in your federation's newsletter and website.
 - 7) Provide copies of your recruiting articles to your chapters for inclusion in their newsletters.
 - 8) NARFE's Advocacy Department can track advocacy activity by current members. Use these reports to identify which NARFE members have taken action already and therefore expressed interest in advocacy. Ask the Advocacy Department for copies of the Congressional Meeting or Event Feedback Form responses and work with Advocacy staff to contact members who completed the form but don't currently hold an advocacy leadership position.

- 1) Federation Area/District Vice Presidents should work with their chapters to help identify potential CDL/SLs in the chapters. They are in the best position to do face-to-face recruiting.
- 2) Success in recruiting and, more importantly, retaining state CDL/SLs depends highly on federation support, both in terms of training and finances. When CDL/SLs are meeting with members of Congress they are performing a critical federation responsibility and should receive reasonable reimbursement for expenses incurred.

NARFE's Advocacy Department

- 1) The Advocacy Department established a dedicated staff position to assist federations with grassroots advocacy. For questions, assistance, guidance and anything else, contact the Advocacy Department at advocacy@narfe.org.
- 2) The Advocacy Department is developing a series of articles for *NARFE Magazine* highlighting the importance of the CDL/SLs and how to encourage and solicit members to volunteer.
- 3) Individuals and federations will be encouraged to attend LEGcon, NARFE's biennial Legislative Training Conference in the Washington, DC area. At LEGcon, attendees learn about advocacy best practices and have the opportunity to meet with legislators and their congressional staff to address NARFE's legislative priorities. Federations should provide financial assistance to enable members to attend this all-important, premier advocacy training.