

ALTA Congressional Liaisons Toolkit



A L T A
CONGRESSIONAL
LIAISON



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The Role of a Congressional Liaison

Congressional Liaisons are industry professionals committed to offering helpful information about the land title and real estate industry to Members of Congress.

Congressional Liaisons (CLs) are an integral part of ALTA's advocacy efforts in Washington DC and as title insurance experts, play a vital role in educating legislators about issues related to our industry.

When you volunteer to serve as a Congressional Liaison, you become the primary point of contact for your designated Member of Congress and assume the responsibility of relaying the views of the title industry through frequent communication with the elected official and their staff.

Necessity for Congressional Liaisons

Many people, including our elected officials, do not know much about the title insurance industry. ALTA lobbyists spend lots of time meeting with Members of Congress, and while they can relay important information, they can never match the impact of you telling your personal story about your business and customers. Stories are memorable and move people. When delivered by constituents who live and vote in their district, the effect is even greater. As a Congressional Liaison your efforts will help advance the interests of our industry.

Grassroots communications put a human face on the issues that affect the title industry and help Members of Congress understand the choices they make impact the lives of their constituents back home. The facts, ideas and industry information you share with lawmakers will help them make more informed decisions, so they can better legislate. Congressional Liaisons' efforts have already contributed to many legislative victories.

Expectations and Responsibilities of a CL

Stay Informed - Your knowledge of the issues is vital to your ability to present information to Members of Congress. You can do this by keeping up with *News You Can Use* and *Title News*. Your ALTA Congressional Liaison contact will also send you information about active legislation.

Be a Member of TAN - The Title Action Network (TAN) is an easy way to advocate on behalf of title insurance industry. Our voice is stronger when we speak collectively, and TAN helps us do that. Joining TAN is free and takes about 2 minutes. Once registered, you will receive alerts when there is legislation that affects you, your business, or your customers. To act, simply click a button to review and edit a pre-drafted message to your legislators. It takes about 20 seconds and couldn't be easier.

Contact Your Member of Congress 2-4 Times a Year - As a Congressional Liaison you should connect with your target legislator's office at least 2-4 times per year. Members of Congress and their staff can be approached through a variety of ways. Personal meetings are the most effective form of communication, however communication with an elected official should be ongoing. Keep your elected officials abreast of any developments and enquire about bills you may have discussed. Remaining in touch with Congressional offices will make it easier to schedule subsequent meetings.

If you are able to speak with your Member directly, great. If not, it's no big deal. The communication doesn't always have to be with the actual Member. Congressional staff often help promote industry objectives. Good advocacy is all about CONNECTIONS and COMMUNICATION. Once you have made a connection with an elected official, it is time to start regular communication. Here are some ways to get started:

- When you get a TAN alert, use the message text to print a letter and hand-deliver it or mail it to your legislator's district office.
- When you get a TAN alert, use the message text as talking points, and call your Member of Congress' office.
- Act when ALTA staff ask you to reach out to your legislator about a specific issue.
- Schedule a visit to the district office of your Member of Congress. This meeting can be an introduction, a legislative request, or simply to provide information about what title insurance does. If you meet with staff, arrange to speak with the district director or the person responsible for insurance, banking or real estate. Get to know key staff. It is just as important to develop relationships with Congressional staff as the Member themselves. They are a Member's closest advisors in the Capitol.
- Attend Advocacy Summit and meet with your Member of Congress.
- Invite your Member of Congress to visit your office and meet your staff or to participate in meetings you hold for first-time homeowners.
- Involve your Member of Congress in your state LTA activities. Invite them to speak at your convention or attend meetings.
- Volunteer to help with campaign activities. Consider volunteering in the office, attending events, hosting a fundraiser, or even opening your office for an afternoon or evening of use.
- Consider making a personal contribution to a campaign or invite other title professionals to a fundraising event hosted at your home.
- Contribute to TIPAC and ask about personally delivering a PAC check.
- Continue to build your relationship by taking advantage of any occasions when you run into the Members of Congress or their staff.

Reporting Back to ALTA

Information you gather talking to Members of Congress is very valuable to ALTA Lobbyists. Knowing about your interactions enables us to better plan and coordinate our own activities. The fastest and easiest way of keeping ALTA staff in the loop is to complete a brief survey each time you interact with your Member of Congress. Take the survey at: [IMBEDDED ADDRESS]. The survey will take no more than 2-3 minutes to complete.

Calling Your Member of Congress

Calling the office of your Member is great way to communicate your concerns. Office staff track the number of phone calls and letters that the Member's office receives on various topics. Therefore, the more, the better! Every Member's office information can be found online (www.usa.gov/elected-officials) or by calling the Congressional switchboard: 202-225-3121 (House of Representatives); 202-224-3121 (Senate)

- Ask to speak with the aide who handles matters of real estate, insurance, or finance.
 - Mention that you live in the district and provide your name and company name.
 - Briefly describe your experience with title insurance to establish further credibility before explaining your concern or request.
 - Always be certain to ask for the Member's position
 - Report back to ALTA by filling out an Action Report on ALTA.org [IMBEDDED ADDRESS].
 - Remember that you can also reach out to the Member's district.
-

How to Compose a Letter to your Member of Congress

- Get to the point - Your purpose for writing should be stated in the first sentence of the letter. If the letter pertains to a specific piece of legislation, include the bill name and number.
 - Layout your case - Explain how legislation would affect you, your employees/coworkers, your industry or your customers.
 - Be concise and courteous - Keep your letter to 1 page and only bring up one issue. Make your case but be polite.
 - Ask for a response - Include in your letter that you would appreciate a reply containing the position of the Member of Congress on the issue. As a constituent, you have a right to this information.
 - Say Thank You - In addition to making requests, make time to send thank you messages if your Member of Congress supports you or votes as you requested.
-

Structuring Correspondence with Your Congressional Member

(DATE)

The Honorable (NAME)
United States Senate or U.S. House of Representatives
(STREET)
(CITY, STATE, ZIP)

Dear Senator or Representative (NAME),

As you know, I am a constituent and a title insurance professional. I am writing today because I am gravely concerned on recent developments regarding [INSERT ISSUE] and how this may adversely affect our district and the title insurance industry.

[INSERT INFORMATION ON THE ISSUE AND YOUR PERSONAL EXPERIENCE DEALING WITH THE ISSUE, ETC.]

Please let me know your position on this issue and if I can provide you with additional information

Thank you for your consideration of my request. I look forward to hearing from you soon. You can reach me at _____ or via email at _____.

Sincerely,

[SIGN]

How to Schedule Appointments with Your Member of Congress

- Send an email to the scheduler requesting a meeting.
- The request should include: The date and time of day you would like to meet with the member, or their staff if needed. Include the name of the legislation or topic you would like to discuss. Provide contact information so the scheduler can reach you
- If you have not received a response, follow up with a phone call one week after you send the request. Ask to speak with the scheduler. Keep in mind that this person is the gate-keeper for connecting with your Member of Congress.
- A few days prior to the scheduled meeting, call the scheduler to confirm the meeting.
- Please send a thank you note after the meeting that includes any follow-up on your requests.
- Please file your Action Report on ALTA.org [IMBEDDED ADDRESS] within 10 days of your meeting.

Structuring Correspondence to Request a Meeting

(DATE)

The Honorable (NAME)
United States Senate or U.S. House of Representatives
(STREET)
(CITY, STATE, ZIP)

Dear Senator or Representative (NAME),

As you know, I am a constituent and a title insurance professional. I am writing today because I would like to meet with you to discuss issues related to the title industry that impact [STATE].

I would like to meet with you on [INSERT DATE], in your Washington, D.C. office [District Office if applicable] while I am in the area for [INSERT REASON FOR VISIT].

As a member of the American Land Title Association (ALTA), I am interested in discussing these issues [LIST TOPICS].

I understand you have a busy schedule, so let me know if there is another day or time that works best for you. Should you not be available to meet, I would be happy to meet with your chief of staff, legislative director, and/or legislative assistant who handles Insurance, Banking or Real Estate.

Thank you for your consideration of my request. I look forward to hearing from you soon. You can reach me at _____ or via email at _____.

Sincerely,

[SIGN]

Meeting with Members of Congress DO'S & DON'TS

DO:

Before the Meeting:

- **Learn about your Member** - Your meeting will begin with small talk. Know where your member is from and anything else that can help break the ice. Read information on a member's congressional website and sign up to receive email updates. Offices promote what is important to the Member. When meeting with a legislator who opposes or is undecided on an issue ALTA advocates for, try to find common ground on other topics.

- **Plan Your Meeting** - You don't want to forget anything, so write talking points that include real examples or evidence in support of your position. If someone is attending the meeting with you, decide who will lead each part of the conversation and what each person will cover while making sure to cover all talking points. An effective strategy is to make sure your comments complement each other. For example, Person A makes a point and Person B provides an example.
- **Be Respectful of a Legislator's Time.** Show you value the time given to you when you meet with your Member of Congress by being on time and quickly covering the most important items you wish to discuss. It is likely you will only have 20 mins – so make the most of it.
- **Notify ALTA.** Touch base with ALTA before your meeting so we can provide pertinent background or things to know.

During the Meeting:

- **Make your issue local.** Tell a story that makes the issue relevant to the constituents of the Member of Congress. Providing real evidence and examples of how the issue relates to people in the district will add weight to your position.
- **Make the Ask.** Present your request as a need and not a favor. Why is it important the Member offer support?
- **Get an Answer.** After explaining the issue and providing your talking points, ask the member his/her position on the issue and why.
- If a Member opposes or is undecided on the position you advocate, try to discover why they are having difficulty coming to agreement with you. Acknowledge their opinion, as there are pros and cons to every issue. Politely relay that you have considered their position but respectfully disagree.
- **Be truthful.** If you are asked something that you do not know or are unsure of, say you don't know, but are happy to follow up. Nobody knows everything.
- **Be grateful.** Before leaving the meeting, thank the Member and any participating office staff for their time and consideration of your requests.

After the Meeting

- **Stay on the radar.** Send a thank-you email to the Member and any staff you met with. Aside from being good follow-up, this has the added benefit of keeping your issue fresh on the minds of those who you met with.
- **Report back to ALTA** - File an Action Report on ALTA.org [IMBEDDED ADDRESS]. Your update is very important to planning our lobbying efforts.

DON'T

- **Don't get off topic.** People like to talk about what they know, and most are not title insurance experts. If you get off topic, return the meeting to your talking point and maintain control of the conversation.
- **Don't be nervous.** You are an expert on issues related to the title industry. You have important and valuable information to share. Be confident and talk about the issues and how they relate to your business and customers.
- **Don't talk politics.** Don't talk about politics or bring up campaign activities or TIPAC contributions.

Presenting TIPAC Contributions

Last year, the Title Insurance Political Action Committee (TIPAC) contributed a record amount of over \$500,000 to Congressional Members. The generosity of ALTA's members continues to provide us with an additional way to interact with Members of Congress. Because we believe ALTA members are our best advocates, we want you to deliver TIPAC checks when possible.

It is vitally important that an ALTA Congressional Liaison adheres to rules mandated by federal law when representing TIPAC and presenting any campaign contribution.

- Have an in-person meeting or attend an event as a TIPAC representative (in some cases, the TIPAC check will be delivered separately)
- TIPAC contributions should be given at non-government locations like your office, or the campaign headquarters. NEVER deliver a check on government property.
- If you have been given a check, deliver it at the prescribed date/time only.
- Contact TIPAC if you cannot deliver the check for any reason.
- Thank the Member of Congress for his/her work and supportive actions, but do not discuss specific legislation. You must not make a legislative ask when delivering a TIPAC check.

Compliance Checklist:

- Present the TIPAC check away from federal property
- DO NOT discuss pending or specific legislation
- Never present a check after the election day.
- Coordinate with Nicole Reppert
- Deliver the TIPAC check in person
- Immediately notify ALTA if the check is misplaced

How to Volunteer on a Campaign

Volunteering during your members reelection campaign is also a great way to develop your relationship with your Member of Congress and their staff. To get involved with your Member's campaign events:

- Call the campaign office and ask to speak with the campaign manager
 - Provide your name and your company name
 - Explain that you live in the district
 - Express your desire to get involved with campaign activities
 - Ask how you can make yourself be of any help
-

Congressional Staff: Who's Who

Capitol Hill Staff

Chief of Staff (CoS): The principal advisor to the Member, the CoS generally runs the office, manages the staff, delegates assignments.

Press Secretary/Communications Director: Manages the Member's media and public relations (press releases, speeches, social networking, media inquiries, etc.)

Executive Assistant/Scheduler: Manages the official schedule and travel. (constituent meetings, committee gatherings, receptions, press conferences, etc.)

Legislative Director (LD): Manages the legislative staff and advises the member on all legislative activity.

Legislative Assistant (LA): The vast range of issues that all Members must vote on are divided among LAs. Each LA generally focuses on a specific set of "portfolio" issues. If a constituent wishes to discuss an issue with the Office of their Representative, the constituent will be referred to the LA who handles the topic of inquiry.

Legislative Correspondent (LC): Receives all constituent mail and issues a response that has been coordinated with the office LAs and LD.

Staff Assistant/Receptionist: Staff Assistants greet visitors and relay general information to any constituent that calls the office. Staff Assistants are often quickly promoted, often within the same office. As they are the gatekeepers to office access, they should not be disregarded.

District Staff

District Director: Manages all activities within the Members home district.

Caseworker/Field Representative: Constituents seeking assistance from a federal agency often contact the caseworker. The caseworker either refers the matter to the appropriate federal agency, or directly handles the issue on the constituents' behalf. The caseworker also handles the Member's meetings and events within the home district.

How a Bill Becomes a Law

HOW DOES A **BILL** BECOME A **LAW**?

1 EVERY LAW STARTS WITH AN IDEA



That idea can come from anyone, even you! Contact your elected officials to share your idea. If they want to try to make it a law, they will write a bill.

2 THE BILL IS INTRODUCED

A bill can start in either house of Congress when it's introduced by its primary sponsor, a Senator or a Representative. In the House of Representatives, bills are placed in a wooden box called "the hopper."



Here, the bill is assigned a legislative number before the Speaker of the House sends it to a committee.

3 THE BILL GOES TO COMMITTEE

Representatives or Senators meet in a small group to research, talk about, and make changes to the bill. They vote to accept or reject the bill and its changes before sending it to:

the House or Senate floor for debate or to a subcommittee for further research.

4 CONGRESS DEBATES AND VOTES

Members of the House or Senate can now debate the bill and propose changes or amendments before voting. If the majority vote for and pass the bill, it moves to the other house to go through a similar process of committees, debate, and voting. Both houses have to agree on the same version of the final bill before it goes to the President.



DID YOU KNOW?

The House uses an electronic voting system while the Senate typically votes by voice, saying "yay" or "nay."

5 PRESIDENTIAL ACTION

When the bill reaches the President, he or she can:

✓ APPROVE and PASS

The President signs and approves the bill. The bill is law.



The President can also: Veto

The President rejects the bill and returns it to Congress with the reasons for the veto. Congress can override the veto with 2/3 vote of those present in both the House and the Senate and the bill will become law.

Choose no action

The President can decide to do nothing. If Congress is in session, after 10 days of no answer from the President, the bill then automatically becomes law.

Pocket veto

If Congress adjourns (goes out of session) within the 10 day period after giving the President the bill, the President can choose not to sign it and the bill will not become law.

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