

LAWMAKER MEETINGS

And

CANDIDATE INTERVIEWS

PURPOSE OF CANDIDATE INTERVIEWS/LAWMAKER MEETINGS

Candidate/lawmaker interviews are an important part of any successful legislative/political action program. Often, these interviews are the first time a candidate/lawmaker becomes familiar with the credit union system; therefore, extreme care and professionalism must be exercised whenever conducting such an interview. The meeting can also be to educate the legislator on specific legislation and to ask for his/her support. The following five items should be accomplished in all candidate/lawmaker interviews:

1. Let a candidate/lawmaker know that there are substantial numbers of politically active and aware credit union members in his or her district. Use & provide Project Zip Code data and/or listing of credit unions in district.
2. Determine the candidate/lawmaker's general attitude toward the credit union system.
3. Educate a candidate/lawmaker as to what a credit union is and how it differs from other financial institutions. If meeting on specific legislation, ask for support.
4. Provide an opportunity for credit union members and candidate/lawmakers to get acquainted.
5. Provide opportunity for credit union officials to become key political contact for lawmakers (CU key contact person).

DUTIES OF LFR FOR CANDIDATE/LAWMAKER MEETINGS

The candidate/lawmaker interview program developed by the League involves credit union managers, board members and employees.

1. Interviews are arranged by the League and/or the Legislative Forum Representative who serves as team captain. Interviews are conducted with the assistance of credit union officials, usually in the legislator's or candidate/lawmaker's district office, campaign headquarters or credit union office.
2. The team captain organizes all interview details including meeting time, place, participants (4 or 5), agenda, appointing spokesperson, handouts and completion of Interview Summary Sheet. Obtain "Issues" paper(s) from ICUL Governmental Affairs department.
3. Candidate/lawmakers and legislators should receive materials regarding the credit union system, a listing of the credit unions in the district (available from Governmental Affairs department), and Project Zip Code information.
4. An Interview Summary Sheet should be filled out upon completion of the meeting and forwarded to the League office for future reference.
5. A thank you letter should be sent from the interview team.

HOW TO SCHEDULE A CANDIDATE/LAWMAKER INTERVIEW

1. Call or email the candidate/lawmaker's office asking for a 20-minute appointment. Explain the purpose of the interview is to get better acquainted with the lawmaker/candidate or to discuss specific legislation. (see attached sample letter)
2. Call/email office to follow-up and set actual time for appointment.
3. Call/email the ICUL Governmental Affairs Department to inform them of the appointment date, time and location.
4. Governmental Affairs (GPA) Department will send you "Issues" paper(s) for inclusion in your confirmation letter. GPA will schedule a System staff person to attend, schedules permitting.
5. Send a confirmation, stating the purpose, time & location of interview. Include "Issues" paper(s) (see attached sample letter)
6. Invite 4 to 5 credit union personnel from the chapter and candidate/lawmaker's district to participate. If possible, pre-arrange a spokesperson and assign questions or topics to be discussed at the meeting.
7. Make a list of participants who will attend the interview. Mail; fax (630-983-2713) or e-mail (pat.huffman@ilcusys.org) to Pat Huffman at least one week prior to the interview.
8. Be prompt and courteous!! The candidate/lawmaker is very busy.
9. Follow the guidelines in "Meetings/Interview Tips".
10. Complete the Interview Summary Sheet and forward it to Pat Huffman in the Naperville office.
11. Send the candidate/lawmaker a thank you letter. (see attached sample)

(INTERVIEW REQUEST LETTER)
SAMPLE LETTER FROM LFR TO Candidate/lawmaker, ASKING FOR INTERVIEW
(Use your chapter or Credit Union letterhead)

January 1, 2016

ADDRESS IF INCUMBENT:

*The Honorable _____
State (Representative or Senator)
Address,
City, Illinois*

ADDRESS IF NON-INCUMBENT:

*Mr. –or- Mrs. _____
Candidate for State _____
Address
City, Illinois*

Dear (Senator/Representative **or** Mr./Mrs.) _____:

As Legislative Forum Representative for the _____ Chapter of Credit Unions, an affiliate of the Illinois Credit Union League, I would like to arrange a 20-minute interview with you in your local office in the near future. Joining me will be several credit union officials from the area.

The purpose of the interview is to allow us to become better acquainted and familiarize you with the many credit union members in your (area or Senate/House district number).

I will contact your office in the near future to arrange a convenient time. We are looking forward to meeting you.

Sincerely,

Your Name & Title

cc: Governmental Affairs Department-Illinois Credit Union League

(INTERVIEW CONFIRMATION LETTER)
SAMPLE LETTER FROM LFR CONFIRMING INTERVIEW TIME
(Use your chapter or Credit Union letterhead)

January 1, 2016

ADDRESS IF INCUMBENT:

The Honorable _____
State *(Representative or Senator)* _____
Address,
City, Illinois

ADDRESS IF NON-INCUMBENT:

Mr. -or- Mrs. _____
Candidate for State _____
Address
City, Illinois

Dear (Senator/Representative **or** Mr./Mrs.) _____:

I am pleased to confirm our appointment for (day of week), (Month, date), at (time) in your office located at (location).

Enclosed are some background materials on credit unions to prepare you for the interview (enclose "Issues" papers).

If you have any questions prior to our _____ meeting, please give me a call.

Sincerely,

Your Name & Title

(INTERVIEW THANK YOU LETTER)
SAMPLE LETTER FROM LFR THANKING FOR THE INTERVIEW
(Use your chapter or Credit Union letterhead)

January 1, 2016

ADDRESS IF INCUMBENT:

The Honorable _____
State *(Representative or Senator)* _____
Address,
City, Illinois

ADDRESS IF NON-INCUMBENT:

Mr. –or- Mrs. _____
Candidate for State _____
Address
City, Illinois

Dear (Senator/Representative **or** Mr./Mrs.) _____:

Thank you for your time last (Month, date), to meet with me and credit union officials from your district to discuss Illinois credit unions and the important benefits they provide to nearly 3 million Illinois consumers.

Our legislative objectives, simply stated, are to maintain our ability to serve our members by maintaining our regulatory independence and not-for-profit, tax-exempt status.

If you have any questions about credit unions, please give me a call.

Sincerely,

Your Name & Title

MEETING/INTERVIEW

TIPS

TIPS ON MEETING WITH A LEGISLATOR

1. FIRST, CALL FOR AN APPOINTMENT...do not just walk in and expect to see the legislator. In setting up meeting, acknowledge what subjects you want to discuss. No one likes surprises, it can be embarrassing for everyone. This allows a legislator to prepare for the meeting or have the staff member who is responsible for the issue area(s) available. Remember, if you can't meet with the legislator, spend time with the staff.
2. BE ORGANIZED...have an agenda. This keeps the meeting from going astray. Remember, your meeting is creating an image to the legislators and their staffs about you or your group. Therefore, seriousness and knowledge of the issue is important. Don't overstate your case.
3. IF YOU ARE A PART OF A GROUP MEETING, TO INSURE A SMOOTH PRESENTATION, HAVE A PRE-MEETING...discuss which topics will be raised and who will present each. Choose one person to lead conversation and see agenda is followed.
4. ALWAYS BE A GOOD "LISTENER"...The legislator's comments and questions should provide insight into a strategy for follow-up materials or who to include in another meeting. Remember, the legislator needs his concerns and issues understood as much as you do. This does not mean you have to agree with his views or compromise your position. Do not speak critically of a lawmaker or his colleagues.
5. BE ON TIME AND DON'T TAKE MORE THAN THE TIME ALLOTTED FOR THE MEETING unless the legislator initiates the continuation. Time demands on legislators is very great. Being organized will insure your discussion of the issues(s) will cover the critical aspects regardless of the time limitation.
6. DON'T LET THE LEGISLATOR EVADE THE ISSUE, AND DON'T BE AFRAID TO ASK FOR A COMMITMENT. An agenda will help to keep everyone on the subject, even the legislator. Don't be timid, ask how the legislator stands on the issue or on specific aspects of the bill. Remember, be tactful. Hostility will only close the legislator's door to you on future issues. If he opposes your position, listen to his arguments, for it may provide insight into developing further issue strategy.
7. DON'T BE AWED. Legislators are people just like you. Most of the time they are "generalists" on issues. It is highly likely they do not understand the issue as well as you. Discuss the issue with them, don't lecture or be defensive. Generally, the Legislative Assistants are generalists on issue, too.
8. DON'T PRETEND TO WIELD POLITICAL INFLUENCE . Never offer election support nor threaten to oppose the legislator in the next election based on your issue.
9. LEAVE FACT SHEETS OR "ISSUES" PAPER(S)...Make them concise. Relate impact of the program or legislation to the lawmaker's own district or state.

MEETING REMINDERS

1. BE FAIR

Remember, your legislator really represents all their constituents...regardless of their party. Don't condemn a legislator just because they support a piece of legislation, which you think is too liberal or too conservative.

2. BE UNDERSTANDING

Put yourself in a legislator's place. Try to understand their problems, outlook and aims. Then you are more likely to help them understand your business and your problems.

3. BE REASONABLE

Recognize that there are legitimate differences of opinion. Never indulge in threats or recriminations. They are only confessions of weakness.

4. BE FRIENDLY

Don't contact your legislator only when you want their vote. Invite them to your meetings....perhaps as a speaker. Take pains to keep in touch with them throughout the year.

5. BE THOUGHTFUL

Commend the right things that your legislator does. That's the way you'd like to be treated.

6. BE COOPERATIVE

If your legislator makes a reasonable request, try to comply with it. You can help them by giving them the information they need. Don't back away for fear you're "getting into politics".

7. BE REALISTIC

Remember that most controversial legislation is the result of compromise. Don't expect that everything will go your way, and don't be too critical when it doesn't.

8. BE ACCURATE AND FACTUAL

The mere fact that you want or do not want a piece of legislation is not enough. If an issue goes against you, don't rush to blame the legislator for "failing to do what you wanted". Make certain you have the necessary information and do a good job of presenting your case.

9. GIVE CREDIT WHERE CREDIT IS DUE

If an issue goes the way you wanted, remember that your legislator deserves first credit. They have the vote, not you. And, remember also that many organizations and individuals might have participated on your side. Say "Thank You"! Everyone appreciates a compliment.

10. LEARN TO EVALUATE ISSUES

The introduction of a legislative bill doesn't mean that it will become law. Whether you're for it or against it, don't get excited about it until you learn the "who, what and why" of it.

11. SUPPORT YOUR LEGISLATOR

If they are running for re-election and if you believe they deserve it, give them your support. They need workers and financial supporters. Don't become aloof at the time they need your help, and then they won't when you need them.

12. MAINTAIN CONTACT

Don't contact your legislator only when you want their vote. Keep in touch with them throughout the year.

13. DON'T BE A BUSYBODY

Legislators don't like to be pestered, or scolded, or preached to. Neither do you.

14. PROMOTE CREDIT UNIONS

Speak highly of your credit union and its cooperative nature. Remember to spread the "good news membership service stories".

CANDIDATE INTERVIEWS

QUESTIONS TO EXPECT FROM CANDIDATES

(The interview team captain should review this handout with the interview team prior to conducting a candidate/lawmaker interview and may wish to refer to it when completing the interview summary sheet.)

QUESTION:

Does your association have a political action committee (PAC)? How are PAC funds allocated?

ANSWER:

The Illinois Credit Union System does have a PAC named Credit Union Political Action Committee (CUPAC). CUPAC is a bi-partisan political action committee that is governed by a board of directors elected annually by the 23 statewide Chapter Legislative Forum Representatives affiliated with the ICU System. CUPAC contributions to individual candidate/lawmakers are determined by the CUPAC Board based on a number of factors including but not limited to:

- Candidate/lawmaker's prospects for a successful election.
- Sponsorship of credit union related legislation.
- Voting record on credit union related issues.
- Leadership position and/or committee assignment.
- Candidate/lawmaker interview team results.
- Past & present support as reviewed by ICU System core Governmental Affairs Department personnel.

QUESTION:

Does your association endorse candidate/lawmakers?

ANSWER:

Neither the ICU System nor CUPAC "endorses" candidate/lawmakers. CUPAC does provide financial support for candidate/lawmakers who look favorably on credit unions and their legislative objectives. Individual credit union officials and credit union members are encouraged to actively participate in campaign elections in their local areas.

QUESTION:

What are your current legislative issues? Who are your lobbyists?

ANSWER:

The ICU System lobbyists (Steve Olson, Keith Sias, Ashley Niebur, Dick Lockhart, Joe Lyons) can best answer this question. As a general rule of thumb, credit unions seek the same privileges that other financial institutions enjoy. Issues include: maintaining the cooperative structure of credit unions, maintaining a strong dual-chartering system and meeting the growing needs of over 3 million Illinois credit union members for convenient financial services. As needs change, the law should change as well.

ISSUES TO COVER DURING AN INTERVIEW

ISSUE #1:

Be sure to inform the candidate/lawmaker that there are a large number of credit union members (that are politically active) who live or work in their district. For privacy, however, the names and addresses of credit union members are not available to candidate/lawmakers. Use and provide Project Zip Code data and/or listing of credit unions in district.

ISSUE #2:

Assume that most candidate/lawmakers have little knowledge of credit unions so:

- a) Prior to interview, provide the candidate/lawmaker with "Issues" paper(s) supplied by the League;
- b) Explain the cooperative structure of credit unions and the difference from for-profit financial institutions. Share positive stories
- c) Answer questions the candidate/lawmaker might have about credit unions, but don't get into a long discussion regarding specific legislation. If you can't answer a question immediately, offer to get the answer. The League can supply you with the information later. The main purpose of this meeting is to get acquainted.
- d) Do not leave the impression that there is disunity in the credit union movement. Politicians are quick to spot internal conflicts and this would only serve to weaken our position.

ISSUE #2:

Please review the candidate/lawmaker interview summary sheet prior to the interview. Be sure to focus on the following issues:

- Prior elected offices
- Education Background
- Present occupation (It is OK to ask for a resume.)
- What legislation is the candidate/lawmaker interested in sponsoring if elected?
- Credit union membership & knowledge of credit union movement

ISSUE #3:

In order to evaluate the candidate/lawmakers' chances for election, please ask the candidate/lawmaker to provide their election plans, including: campaign brochures and any other material they would like to share.

Illinois Credit Union System Candidate Interview Summary Sheet

Candidate/lawmaker Name _____ Date _____

Address _____

Phone _____

Candidate/lawmaker for: State Representative State Senator Congressional Member

District _____ Party Affiliation _____

Incumbent? _____ Yes _____ No

(The following is to be completed by the Team Captain and forwarded to the League office immediately after the interview).

1. Is the candidate/lawmaker a member of a credit union? _____ Yes _____ No

2. If so, indicate name of credit union _____

3. If not a credit union member, is candidate/lawmaker familiar with the credit union movement?

_____ Yes _____ No

4. Does the candidate/lawmaker have a close friend or contact in the credit union movement?

_____ Yes _____ No

If so, who and which credit union? _____

5. What was the candidate/lawmaker's general opinion of the credit unions' place in the financial world compared to banks, S&L, or finance companies?

___ Pro Credit Union

___ Pro Bank

___ Anti-Credit Union

___ Anti-Bank

___ Neutral

___ Neutral

Other _____

6. What was the candidate/lawmaker's general attitude toward credit unions?

7. Did the candidate/lawmaker seem genuinely interested in the objectives of the credit union movement?

_____ Yes _____ No

8. Did the candidate/lawmaker ask any questions which you could not answer?

_____ Yes _____ No

If so, please list the questions below and we will get an answer to you for follow-up.

9. Describe your over-all impression of the visit: What was said? What Questions were asked? Problems raised? Other?

10. Did you make any arrangements for a future contact? If so, describe.

Interviewing Team Consisted of:

Name *Credit Union*

Name *Credit Union*

Name *Credit Union*

Name *Credit Union*

Name *Credit Union*

Important: Send copy to the League office. Retain one or more copies for the interviewing team. Also, enclose a copy of the campaign brochure, if available, with the League copy. **Please return to: Pat Huffman, Illinois Credit Union System, 1807 W Diehl Rd, PO Box 3107, Naperville, IL 60566-7107**