



GRASSROOTS TOOLKIT

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INTRODUCTION TO GRASSROOTS

Grassroots advocacy is the practice of educating public officials to promote and achieve legislative objectives. The effort is not the work of professional lobbyists or staff, but by members of a peer group working together toward common goals.

The Association for Corporate Growth (ACG) engages in grassroots to help ACG members meet with their members of Congress about key issues of concern to build long-term relationships with legislators.

ACG members can influence key decision-makers in our nation's capital and help shape the future of the middle market. Legislators make policy decisions that affect the businesses ACG members operate and the overall U.S. economy. Developing and delivering effective messages to elected officials about ACG's legislative priorities raises the profile of the middle market. These types of interactions can lead to building important relationships that improve the effectiveness of ACG's advocacy efforts on Capitol Hill.

If you have questions about ACG's activities or how to get involved please visit www.acg.org/public-policy or contact our public policy department at policy@acg.org.

FEDERAL GOVERNMENT BASICS

Congressional Structure & Leadership Positions

The United States House of Representatives is comprised of 435 voting members who serve two-year terms and represent an average of 650,000 constituents. The number of seats per state and the lines of the congressional districts are determined by the results of the U.S. Census and state government officials, respectively. The United States Senate has 100 legislators, two from each state, who serve six-year terms.

Decisions on what legislation is brought up in committee or to the floor for a vote are made by the House and Senate's majority party leadership. The structure of the House allows the majority party to set the agenda, and assuming all members of that party vote together, pass legislation, regardless of the minority party's views.

The lists below highlight the top leadership posts in the House and Senate.

HOUSE

- Speaker of the House: Chosen by members of the majority party.
 - Currently held by: Rep. Paul Ryan (R-WI-1)
- Majority Leader: Dictates the Floor schedule on behalf of the majority party.
 - Currently held by: Rep. Kevin McCarthy (R-CA-23)
- Majority Whip: Manages the vote or "whip" count for the majority.
 - Currently held by: Rep. Steve Scalise (R-LA-01)
- Minority Leader: Chosen by the members of the minority party.
 - Currently held by: Rep. Nancy Pelosi (D-CA-12)
- Minority Whip: Manages the vote or "whip" count for the minority.
 - Currently held by: Rep. Steny Hoyer (D-MD-05)

SENATE

- President Pro Tempore: Largely a symbolic role held by the most senior member of the majority party.
 - Currently held by: Senator Orrin Hatch (R-UT)
- Majority Leader: Dictates the Floor schedule on behalf of the majority.
 - Currently held by: Mitch McConnell (R-KY)
- Majority Whip: Manages the vote or "whip" count for the majority.
 - Currently held by: John Cornyn (R-TX)
- Minority Leader: Chosen by the members of the minority party.
 - Currently held by: Senator Harry Reid (D-NV)
- Minority Whip: Manages the vote or "whip" count for the minority.

- Currently held by: Richard Durbin (D-IL)

Committee Assignments & Issues Jurisdiction

Members of the House and Senate are assigned to serve on congressional committees. Committees hold hearings and consider legislation before it is brought to the floor by their respective leadership.

Committees are comprised of members of both parties, but the chair is always a member of the majority party and the minority party has fewer members seated on the committee. As with the floor agenda, the decision to bring up legislation or hold a hearing is determined by the chair and majority party members.

Each committee oversees different jurisdictions and legislative issues. It is not uncommon for bills, especially larger and more complex packages, to have issues of overlapping jurisdiction and require input from multiple committees.

Based on the issues important to ACG and the jurisdictions of the various House and Senate Committees, the committees that take the most action that can impact ACG members are:

HOUSE COMMITTEES

- House Financial Services Committee
- House Ways & Means Committee
- House Small Business Committee
- House Rules Committee

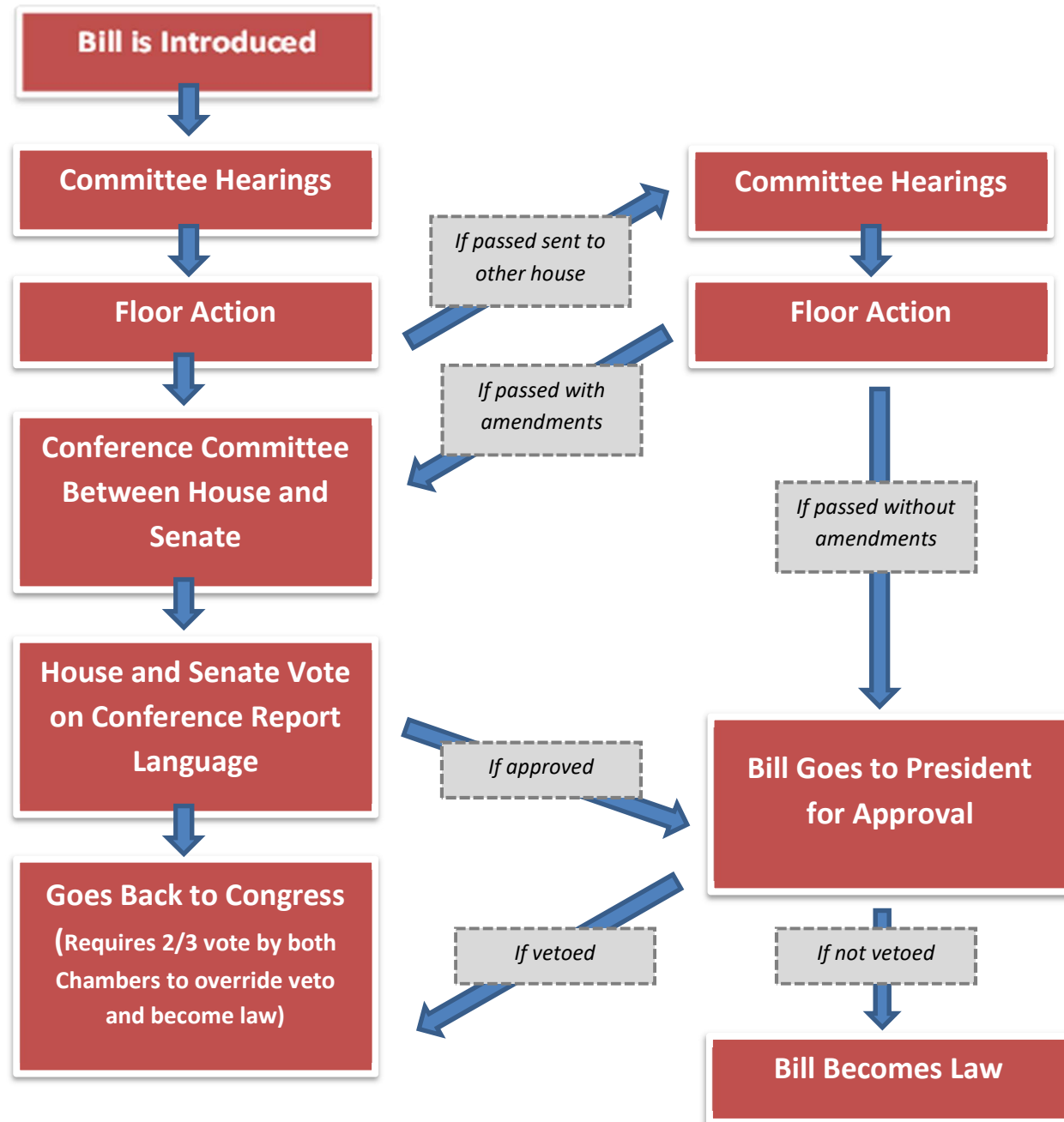
SENATE COMMITTEES

- Senate Banking Committee
- Senate Finance Committee
- Senate Budget Committee
- Senate Small Business Committee
- Senate Health, Education, Labor and Pensions Committee

The Legislative Process

The chart below outlines the process of how a bill becomes a law. It is important to note that legislation does not necessarily follow this exact route on the way to the President's desk – in fact, that very rarely happens. Regardless, it is still important to understand the list of hurdles that a bill must overcome before becoming law.

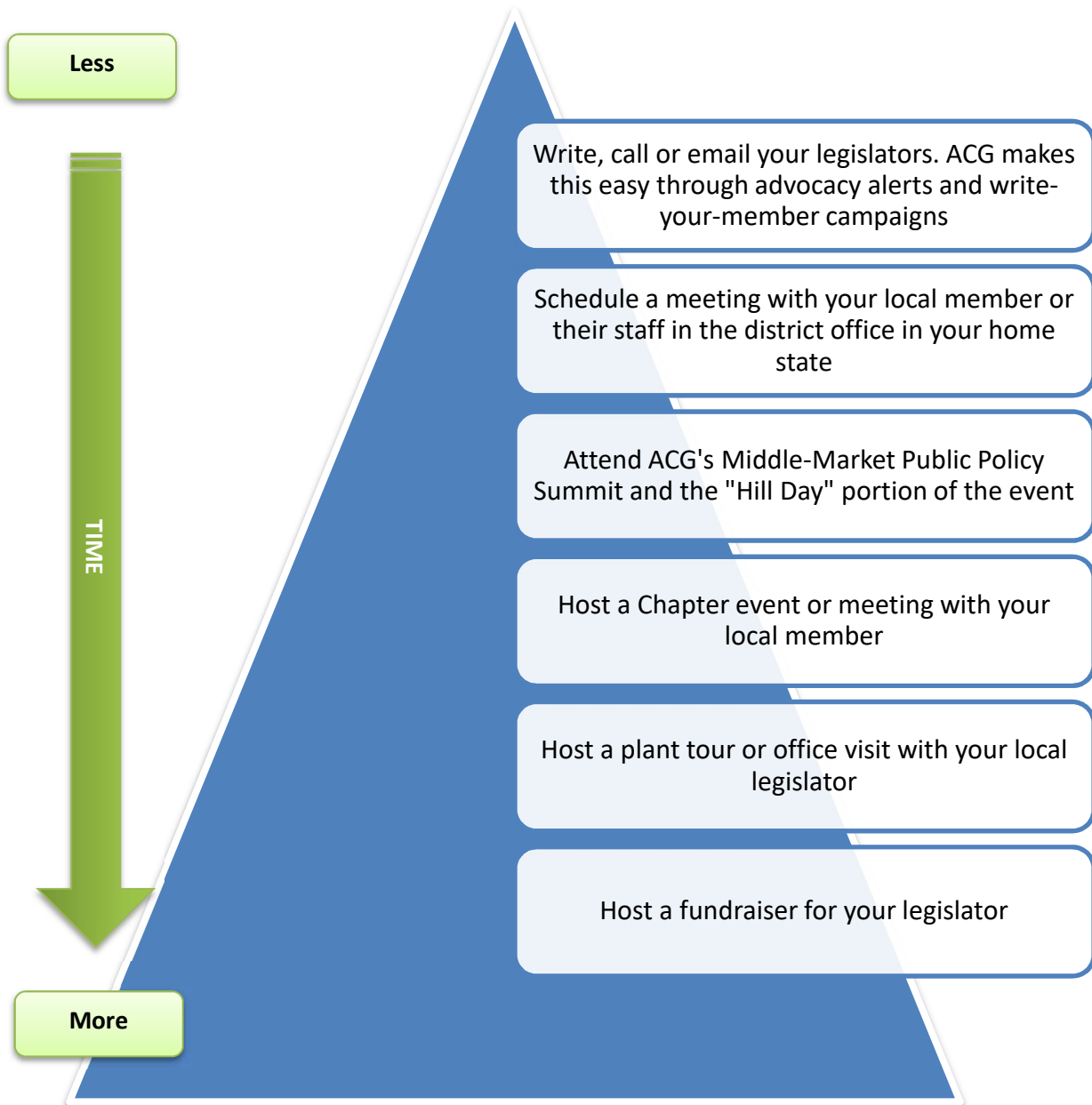
How a Bill Becomes Law



GETTING INVOLVED

The Spectrum of Grassroots Activities

Becoming involved with ACG's grassroots advocacy does not have to be a large time commitment. ACG Global seeks to offer a variety of advocacy options that can fit into your busy schedule. Below is a chart outlining the spectrum of grassroots activities – ranging from those that take very little time to others that require a more substantial time commitment. Ways to get **involved** include:



Advocacy Activities

Participate in Advocacy Campaigns

Through ACG Global grassroots action alerts, ACG members have the opportunity to participate in a variety of email advocacy campaigns through the [ACG Action Center](#). These campaigns are user friendly and provide ACG members with the necessary tools to contact respective legislators on issues important to the middle market.



Participate in ACG's Middle-Market Public Policy Summit

ACG's Middle-Market Public Policy Summit offers a chance for ACG members to stay abreast of hot issues impacting the middle market. Featured speakers and panelists include leaders from the Administration, Congress and other thought leaders.

In addition to speakers at the Middle-Market Public Policy Summit, ACG Global offers a chance for members to advocate on behalf of the middle market in the busy environment of Capitol Hill. ACG provides talking points on legislative priorities, as well as additional resources and presentations crafted specifically to prepare you for meeting with staff and members of Congress. This opportunity is great for those new to advocacy as well as ACG members who are experienced in sharing our message with legislations.

For more information on hill visit opportunities please contact ACG's Public Policy Department at policy@acg.org.

Stay tuned for information around ACG's Middle-Market Public Policy Summit in 2015.

Attend a Local Town Hall Meeting

One of the most effective ways to gain the attention of elected officials and their staff is to attend a town hall or community meeting. Legislators arrange these meetings to hear from constituents. Take the opportunity to introduce yourself as a leader of ACG and ask questions. To accommodate travel schedules, local meetings generally occur during district work periods when legislators are back in their home districts. ACG Global encourages members to visit your elected leaders' websites, Facebook pages and Twitter accounts to stay informed on local events and top issues.

Invite Legislators to Speak at a Chapter Event

Members of Congress are invited to speak at numerous events every year, especially back in-district. Speaking engagements in front of a large crowd of constituents are a great way for legislators to easily reach out to many voters while providing insights on critical legislation.

Inviting a member of Congress to an ACG Chapter event or meeting is a great opportunity to for ACG members to hear at length from a local federal official on issues that directly impacts their community and the middle market.

ACG Global regularly helps facilitate meetings with members of Congress. Feel free to contact us at policy@acg.org for assistance.

Please find below instructions and a sample speaking engagement request letter.

Step 1: Identify your legislators

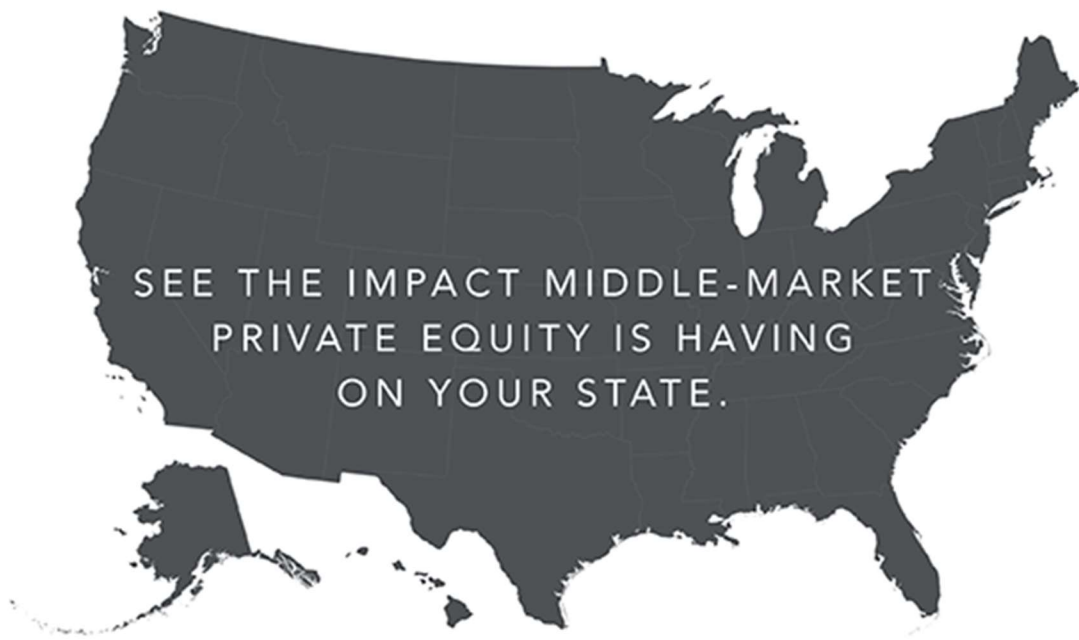
The federal government has official websites that can direct you to your federal legislators. To locate and contact your U.S. Senators, please visit www.senate.gov to see a complete list of Senators and links to their official websites. Contact information for their local offices are usually found at the bottom of the page or under a “Contact Me” tab.

If you are unsure of your U.S. Representative, please visit www.house.gov and fill in your zip code in the “Find Your Representative” tool located on the top right of the page. This will lead you to your U.S. Representative’s official website. Similar to the Senate, contact information can be found at the bottom of the page or under a “Contact me” tab.

Because ACG Chapters can touch several districts, it is recommended that you do a bit of research on your adjoining elected leaders to ensure the best fit for ACG members and your event. We encourage chapters to look at their Member’s websites to see their congressional committees, political party, leadership positions, issues they care about and their career background. This will ensure a productive meeting and allow you to assess how much education the Member may or may not need on the middle market during your meeting.

Step 2: Visit GrowthEconomy.org

Importantly, it will be critical in advance of the request to have data points to help supplement the importance of private capital in your elected leader's district or state. Visit www.growtheconomy.org to view snapshots of jobs and sales growth by congressional district to help prepare your official for their visit and why it matters to them. If you have questions about Driving Growth data, please contact us at policy@acg.org.



Step 3: Compose a speaking engagement request letter

When requesting a federal legislator speak at an upcoming local event, it is important to provide the office with the request in writing to the office scheduler. Please keep in mind the best chances to secure a meeting are during in-district work periods. The letter should clearly include the following:

- Contact information
- Dates/Times/Availabilities (it's important to provide options and remain flexible to the Representatives/Senators busy schedules)
- Summary about the format of the meeting
- Suggestions for topics to be included in the presented remarks

Below is a template request to a congressional office letter for your reference.

To meet at facility or office:

Month x, Year

The Honorable <**first & last name**>

<**office number & building**>

Washington, D.C. <**zip code**>

Dear <**Congressman or Senator Last Name**>:

On behalf of ACG <**insert chapter**> and our <**insert number of ACG Chapter members**>, we invite you meet with an elite cross-section of our membership during the upcoming in-district recess period. We would be privileged to introduce you to ACG and our <**insert chapter**> leaders who bring growth to middle-market companies all over the country.

This visit is an informal opportunity for you to see firsthand the value ACG members bring to your <insert district/state> and speak candidly with our leadership. We expect the entire meeting to take no more than 60 minutes and would like to suggest meeting on <**insert options: Wednesday, March x, or Thursday, March x**>, at <**insert location**>.

As you consider this invitation, please also keep in mind:

- <**insert Driving Growth data relevant to state or district**>

We sincerely hope you will accept this invitation to meet with us in-district. Please let me know if one of these dates is convenient. Please feel free to contact me at <**insert email and phone number**> with any questions. We appreciate your consideration of this invitation in advance.

Sincerely,

<**insert name**>

<**insert title**>

<**insert company**>

<**insert ACG chapter**>

To speak at an ACG Chapter event:

Month x, Year

The Honorable <**first & last name**>

<**office number & building**>

Washington, D.C. <**zip code**>

Dear <**Congressman or Senator Last Name**>:

On behalf of ACG <**insert chapter**> and our <**insert number of ACG members**>, I would like to invite you to speak at our upcoming meeting at <**event**> in <**location**>. We would love to hear from you at any point between <**time slot**> on <**date**>.

As background, <**insert event title**> is held annually and provides an opportunity for the <**number of attendees**> ACG leaders in the region to meet and discuss business issues that are important to the growth of middle market. Specifically, we would appreciate to hear your perspectives on <**insert issues: i.e. financial services, tax reform, etc.**>

As you consider this invitation, please also keep in mind:

- <**insert Driving Growth data relevant to state or district**>

We hope your schedule will permit you to join us for our upcoming meeting. Please feel free to contact me at <**insert email and phone number**> with any questions. We appreciate your consideration of this invitation in advance.

Sincerely,

<**insert name**>

<**insert title**>

<**insert company**>

<**insert ACG chapter**>

Step. 4: Contacting the congressional office

After completing your request letter, it is recommended that you email the request to the Member's scheduler. The scheduler plays a critical role in securing a meeting with the Member and the overall coordination of your event or meeting. You can find out the scheduler's email by contacting policy@acg.org.

About a week after emailing the scheduler with the invitation, please call or send another follow-up email. He or she may ask you to resend the request or they may request you forward to their local office. Please keep in mind that Senators and Representatives keep a very hectic calendar, even in the district. **To ensure a greater**

success of the Member participating, you should email the invitation at least six weeks in advance and be as flexible as possible.

Please be aware that legislators, especially on the west coast or in rural areas, may not be able to travel home every week when Congress is in session. It is helpful to request a meeting during a congressional recess to increase chances of availability. To view House and Senate calendars, visit the websites below:

House: <http://www.majorityleader.gov/floor/#annual>

Senate: https://www.senate.gov/legislative/resources/pdf/2017_calendar.pdf

If you have questions about the congressional calendar, please contact policy@acg.org.

Tips for a Successful Meeting with Your Legislator

Once you have secured a meeting with your legislator or an appropriate congressional staff, it is important to use the opportunity to educate and advocate for the middle market, as well as lay groundwork for a long-term relationship. Below are some tips and reminders to ensure a successful meeting:

Tip 1: Be Prompt & Patient

Plan to arrive 10 minutes beforehand, but keep in mind that it is not uncommon for a legislator to be late or have a meeting interrupted by other pressing matters in the member's crowded schedule. *If interruptions do occur, be flexible.*

Tip 2: Be Prepared

It is important to have an agenda on what you will be discussing at the meeting or event. This agenda should be sent to the scheduler or point of contact with the Member's office in advance of the meeting, along with a list of attendees. Legislators and staff spend hours every day in meetings, so it is important to make a positive impression and relay a list of clear requests or discussion topics to stand out from other meetings.

Ideally, you should bring leave-behind materials outlining basics about your chapter and the middle market, including data from GrowthEconomy.org. These materials should be provided on site.

You do not need to be an expert on each issue you are discussing. ACG Global can be a resource for you on a variety of topics, and we encourage you to reach out in advance of your meeting. If you cannot answer a question asked of you, it is perfectly

appropriate to say, “I do not know, but I will find out the answer and follow up.” This is actually a great way to develop a relationship with the legislator’s staff and be a resource once your meeting is over.

Once again, we encourage you to know basic facts about your legislator including their political party, leadership positions, congressional committee, issues of importance and their career background.

Tip 3: Make a Constituent Connection

Legislators are greatly influenced by what they know and what they hear – especially from the people they represent. It is important to establish a personal connection with the legislator or congressional staffer.

Members of Congress are elected to represent the best interests of their district or state. Wherever possible, demonstrate the connection between what you are requesting and interest of your chapter members.

Tip 4: Stay on Message

Legislators and their staff are very busy and time is a valuable commodity. Be sure to stick to the key topics and the agenda you have prepared. It is important to make your requests clear and concise.

At this same time, don’t assume staffers know about ACG or will feel slighted if you need to provide them an overview or background on the middle market. Use this as a chance to promote the great things about ACG local members and the significance of the middle market. Additionally, don’t let this explanation go longer than a minute or two and don’t get too technical.

If it becomes clear that the legislator or staff disagrees with ACG’s position, move onto the next issue. On the other hand, if they promise to “look into it” – take the opportunity to offer yourself and ACG Global staff as a resource for additional information. This provides a great excuse to send follow-up information and messages.

Tip 5: Avoid Campaign Talk

When you are meeting in a legislator’s official office, either locally or in Washington, D.C., it is important to keep the discussion focused on policy and not politics. Even if you are a supporter, it is not appropriate to mention an upcoming election or a fundraiser in an official congressional office or setting. There are strict federal rules and

repercussions about campaign talk in official business meetings with Members. This talk should be limited to campaign events only.

Tip 6: Don't Forget to Follow Up

Be sure to get the name and business card of the staff member accompanying the elected official. This person will likely be your point of contact as you develop a relationship with the Member.

Additionally, if you and the Member discussed specific ACG issues, be sure to share this information with ACG Global. This information is often very helpful on the advocacy front.

After the meeting, be sure to send a thank you note (email to the Member's scheduler) to express your appreciation for their time and briefly restate the issues discussed and the way you would like to see them respond to the issue.

Please find a template thank you letter for your reference.

Month x, Year

The Honorable <**first & last name**>

<**office number & building**>

Washington, D.C. <**zip code**>

Dear <**Congressman or Senator Last Name**>:

On behalf of ACG <**insert chapter**> and our <**insert number of ACG Chapter members**>, please accept our sincerest thanks for taking the time out of your busy schedule to meet with us on <**date**> at <**location**>.

The middle market is an important segment to the economy, and it is important for ACG members to advocate for policy measures that allow these business leaders to do what they do best, grow companies and create jobs.

Thank you for your remarks on important issues impacting ACG, including your comments on:

- <insert issues discussed/recap highlights of the meeting>

Please do not hesitate to contact me should you have any questions on these issues or other topics relating to ACG and the middle market.

Once again, thank you for your time and attention and your service to our country.

Sincerely,

<**insert name**>

<**insert title**>

<**insert company**>

<**insert ACG chapter**>

Tips for a Successful Site Visit

As with securing a legislator to speak at your event or meet in your office, scheduling a tour of a middle-market company in a legislator's state or district is incredibly powerful. This opportunity allows for the greatest education and lays the groundwork for a long-term relationship. In addition to the local meeting tips above, below are some specific tips and reminders to ensure a successful site tour:

Tip 1: Clarify Site Visit

There are different types of activities that can be included in a site visit including a "town hall" with line employees or inviting media. It is important to confirm the planned

activities before the meeting and to keep the total visit under 60 minutes, unless otherwise preapproved by the legislator's office.

Tip 2: Be Prepared

While a site visit is less formal than a sit-down meeting, it is still important to have a plan of what you will be discussing at the meeting. Additionally, before or after the tour, consider arranging a formal gathering to provide history and background about the company you will be touring and its impact to the legislator's district or state.

Tip 3: Make the Constituent Contact

Legislators are greatly influenced by what they know and what they hear – especially from people they represent. It is important to establish a personal connection with the legislator.

Be sure to share how the middle-market firm or company has expanded sales and job growth. Utilizing the data from GrowthEconomy.org allows you to provide snapshots of data and the role the middle market plays at the local level. In addition, provide necessary and important background information on the firm, including any corporate social responsibility engagement within the local community.

Most importantly, highlight how current regulation and legislation is impacting your business and what it means for growth.

Tip 4: Avoid Campaign Talk

This is another example of an inappropriate time to talk about upcoming elections or fundraising.

Tip 5: Don't Forget to Follow Up

To establish a long-term relationship, be sure to connect with staff and get their contact information. Be sure to follow up with ACG Global on any issues discussed. Most importantly, be sure to send a thank you note to express appreciation for the time and issues that were discussed. See page 14 for a sample thank you.

FREQUENTLY ASKED QUESTIONS

1) *Is grassroots advocacy effective?*

Yes! While the federal process is notorious for being slow-moving, the most effective way to advance legislative goals is through grassroots advocacy. Thousands of bills are introduced in Congress every session, but only a select few become law. Often, it takes years to build enough support to move a bill through Congress.

Participating in grassroots activities ensures that ACG has the ability to successfully share the priorities of the middle market with members of Congress.

2) *Do I have to be informed about politics to participate?*

No – ACG Global staff always provides both political and policy background information when appropriate.

3) *My local legislators have not been supportive of policies important to ACG in the past – should I still reach out to them?*

ACG always encourages its members to meet with their local legislators. While public officials might not agree with all of ACG's legislative priorities, there may be some common ground. If you have had a notably aggressive experience with a particular legislator and/or their staff, please contact ACG Global staff.

4) *My local legislator is a member of a political party that I do not support – why should I engage him/her via grassroots advocacy?*

When participating in ACG grassroots activity, it is important to remember you are advocating on behalf of the middle-market and other ACG members. While you may have a different party affiliation and opposing political views, your legislator may support ACG legislative priorities now or in the future.

You should only participate in meetings you feel comfortable with, but ACG members are encouraged to advocate on a bipartisan basis. This is critical because the political winds shift frequently in Washington, DC, and it's important to have friends on both sides of the aisle. The party in power has the potential to shift every election cycle.