



**Illinois Credit Union League  
Legislative Forum Representative  
(LFR)  
Handbook**

Updated March 31, 2026

# LEGISLATIVE FORUM REPRESENTATIVE

## Job Description

### Duties and Responsibilities

The Legislative Forum Representative (LFR) is the principal coordinator at the chapter level for the legislative and political action activities sponsored by the League and ACU. The LFR's primary responsibility is implementing the action steps necessary to achieve the credit union legislative & political action agenda. The LFR's main responsibilities include:

1. Report at each chapter meeting on the latest developments regarding legislative, regulatory and/or political action events, including CUPAC (monthly Legislative report provided by Advocacy department).
2. Plan, organize and coordinate annual chapter legislator events, such as: Chapter Legislator Appreciation Nights, Receptions, Luncheons, Breakfasts or other chapter activities intended to acquaint lawmakers with the credit union system. Useful links for legislator contact information:  
Illinois General Assembly: [www.ilga.gov/](http://www.ilga.gov/)  
State Board of Elections (find my legislator):  
[www.elections.il.gov/electionoperations/districtlocator/districtofficialsearchbyaddress.aspx](http://www.elections.il.gov/electionoperations/districtlocator/districtofficialsearchbyaddress.aspx)  
[x](#)
3. Plan, organize and coordinate a chapter legislative action network, to encourage credit unions to send emails, post on social media, or make immediate telephone calls or personal visits to lawmakers in case of a legislative emergency.
4. Plan, organize and arrange lawmaker district office meetings, credit union tours and election-year candidate interviews (as requested by ICUL Staff) to develop and maintain personal relationships with lawmakers and develop key credit union lawmaker contacts.
5. Promote CUPAC fundraising programs at chapter meetings. Join CUPAC as an Advocate Member and vote for members of the CUPAC board of directors and approve proposed amendments to CUPAC bylaws.
6. Promote Project Zip Code (<https://betterforillinois.org/project-zip-code/>) to credit unions in the chapter and assist credit unions with implementation.
7. Act as a liaison between the Chapter and the League to suggest proposed credit union legislative and/or regulatory improvements for the League Legislative Committee's consideration. Provide suggested changes to the League Advocacy Department or Compliance Department.
8. Plan, organize and coordinate credit union campaign involvement (as requested by ICUL Staff) in selected CUPAC/ACU supported candidate races.
9. Monitor local election year races for Congress, State Senator and State Representative. Forward items of interest on local races to the League's Advocacy Department.
10. In conjunction with ICUL staff recommendations, attend and/or coordinate CU representation at legislator events supported by CUPAC. Attend and/or support fundraisers organized to raise funds for CUPAC. Attend LFR educational sessions and League sponsored governmental affairs conferences.

**LAWMAKER MEETINGS**

**&**

**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 philosophy; 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 their 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 their district. Use & provide Project Zip Code (<https://betterforillinois.org/project-zip-code/>) data and/or listing of credit unions in district.
2. Determine the candidate/lawmaker's general attitude toward credit unions.
3. Educate a candidate/lawmaker as to what a credit union is and how it differs from other financial institutions. If you meet about specific legislation, ask for support.
4. Provide an opportunity for credit union members and candidate/lawmakers to get acquainted.
5. Provide opportunities for credit union officials to become key political contacts 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 the point of contact. 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 ICUL or chapter point of contact (with input from ICU) organizes all interview details including meeting time, place, participants (4 or 5), agenda, appointing spokesperson, handouts and completion of Interview Summary Sheet. Issues paper(s) provided by ICUL Advocacy department.
3. Candidate/lawmaker should receive materials regarding the credit union league, a listing of the credit unions in the district (available from Advocacy department), and Project Zip Code (<https://betterforillinois.org/project-zip-code/>) information.
4. An Interview Summary Sheet should be completed upon conclusion of the meeting and forwarded to the League office for future reference.
5. A thank you letter/email 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 Advocacy Department to inform them of the appointment date, time and location.
4. Advocacy Department will send you issues paper(s) for inclusion in your confirmation letter. Advocacy Department will schedule a League staff person to attend, schedule permitting.
5. Send 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. E-mail to Abby Walsh ([abby.walsh@icul.com](mailto:abby.walsh@icul.com)) 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 Abby Walsh.
11. Send the candidate/lawmaker a thank you letter/email. (see attached sample)

**(INTERVIEW REQUEST LETTER)**

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

<Date>

**ADDRESS IF INCUMBENT:**

*The Honorable* \_\_\_\_\_  
*State* <Representative or Senator>  
*Address,*  
*City, Illinois*

**ADDRESS IF NON-INCUMBENT:**

*Mr. -or- Ms.* \_\_\_\_\_  
*Candidate for State* \_\_\_\_\_  
*Address*  
*City, Illinois*

Dear <Senator/Representative **or** Mr./Ms. \_\_\_\_\_>:

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. 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 soon to arrange a convenient location, date and time. We are looking forward to meeting you.

Sincerely,

*Your Name & Title*

CC: Advocacy Department-Illinois Credit Union League

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

<Date>

**ADDRESS IF INCUMBENT:**

*The Honorable* \_\_\_\_\_  
*State* <Representative or Senator> \_\_\_\_\_  
*Address,*  
*City, Illinois*

**ADDRESS IF NON-INCUMBENT:**

*Mr. -or- Ms.* \_\_\_\_\_  
*Candidate for State* \_\_\_\_\_  
*Address*  
*City, Illinois*

Dear <Senator/Representative **or** Mr./Ms. \_\_\_\_\_>:

I am pleased to confirm our appointment for <day of week>, <Month, date>, at <time> in <your office, credit union, etc.> located at <address>.

Enclosed are some background materials on credit unions to prepare you for the interview <enclose/attach issues documents>.

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 THEM FOR THE INTERVIEW

(Use your chapter or Credit Union letterhead)

<Date>

**ADDRESS IF INCUMBENT:**

*The Honorable \_\_\_\_\_  
State <Representative or Senator> \_\_\_\_\_  
Address,  
City, Illinois*

**ADDRESS IF NON-INCUMBENT:**

*Mr. -or- Ms. \_\_\_\_\_  
Candidate for State \_\_\_\_\_  
Address  
City, Illinois*

Dear <Senator/Representative **or** Mr./Ms. \_\_\_\_\_>:

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 Illinois consumers.

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

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. CALL OR E-MAIL FOR AN APPOINTMENT...do not just walk in and expect to see the legislator. In arranging 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 for the legislators and their staff about credit unions. 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 YOU OF 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 ensure 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 their concerns and issues understood as much as you do. This does not mean you have to agree with their 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 are enormous. Being organized will ensure 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 they oppose your position, listen to their 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. Don't use industry acronyms.
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.
10. TELL PERSONAL STORIES. Personalizing stories about unique services or help you provided your members (the legislator's constituents) are memorable.

# 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 and outlook. This will help them understand your business and your problems.

## 3. BE REASONABLE

Recognize that there are legitimate differences of opinion. Never indulge in threats or recrimination.

## 4. BE FRIENDLY

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

## 5. BE THOUGHTFUL

Commend the right things that your legislator does.

## 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 compliments.

## 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 volunteers and financial supporters. Don't become aloof at the time they need your help, and then they won't be 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

People, including legislators, don't like to be pestered, or scolded, or preached to.

## 14. PROMOTE CREDIT UNIONS

Speak highly of your credit union and its cooperative nature. Remember to tell "good news stories".

# **CANDIDATE INTERVIEWS**

## **QUESTIONS TO EXPECT FROM CANDIDATES**

(The interview group point of contact 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 League does have a PAC named Credit Union Political Action Council (CUPAC). CUPAC is a bi-partisan political action committee that is governed by a board of directors elected annually by the 19 statewide Chapter Legislative Forum Representatives affiliated with the ICU League. CUPAC contributions to individual candidate/lawmakers are determined by the CUPAC Board based on several 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 League Advocacy Department personnel.

### **QUESTION:**

**Does your association endorse candidate/lawmakers?**

### **ANSWER:**

Neither the ICU League 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 campaigns in their local areas.

### **QUESTION:**

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

### **ANSWER:**

The ICU League lobbyists (led by Ashley Sharp) can best answer this question. As a 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 3.5 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 many 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 (<https://betterforillinois.org/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 between 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 #3:**

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

- Prior elected offices
- Educational background
- Present occupation
- Legislation the candidate/lawmaker interested in sponsoring if elected
- Credit union membership & knowledge of the credit union movement

### **ISSUE #4:**

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 League 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 point of contact 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 family member, 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 \_\_\_\_\_

\_\_\_\_\_



Important: Send a 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 it to: Abby Walsh, Illinois Credit Union League, 225 S. College Ave., Suite 200, Springfield IL 62704. [abby.walsh@icul.com](mailto:abby.walsh@icul.com)**

**CHAPTER**  
**LEGISLATOR**  
**APPRECIATION**  
**EVENTS**

**CHAPTER LEGISLATOR**  
**APPRECIATION EVENTS**  
*(NOT candidate events)*

Successful legislation rests largely in developing a good personal relationship with your lawmaker in what has become a very competitive legislative environment. Chapter legislative appreciation events (legislative recognition programs, legislator acquaintance nights/breakfasts) serve as an excellent opportunity to: better acquaint legislators with the credit union movement; build good will; and develop a strong working relationship with policymakers. The basic ingredients for a successful legislative event are the right attitude, hard work by you and the members of your organization, good timing and a certain amount of luck. Outlined below is a planning checklist for a successful legislative event program.

- Plan the event while the Illinois General Assembly is not in session.
- Some chapters have found it beneficial to combine their CUPAC chapter fundraising event (auction, family picnic, etc.) with their legislative appreciation event. This affords legislators the opportunity to be recognized at a chapter function, as well as gain an appreciation for how hard credit unions/chapters work to raise funds for CUPAC.
- Invite lawmakers (not candidates) on chapter letterhead (if available) at least 45 days in advance of the meeting date. Send copy of invitation to Abby Walsh in the League's Advocacy Department. Inviting legislators by chapter LFR or other chapter official fosters the local connections to credit union personnel and the legislator will be responding to local people.
- Contact the League's Advocacy Department for guidance and contact information for legislators to invite.
- If possible, an Advocacy Department staff member will attend.
- Follow up the letter or e-mail with a phone call to the legislator's scheduler.
- Call to confirm legislators' attendance the day before the event.
- Contact Advocacy staff the day before the event with a list of confirmed legislators.
- Prepare nametags for legislators, all chapter officials, and other special guests.
- Designate credit union official(s) to meet and greet legislator(s) and have them introduce the legislator to other credit union officials.

- Designate someone to take individual and group photos for chapter and credit union publication. Please provide copies of the photos to the League's Advocacy Department.
- Seat legislators at a head table for awards purposes or among the credit union officials to allow them to become better acquainted. Try not to seat lawmakers at the same table.
- Designate CU official for formal introduction of lawmakers (bios available from Advocacy Department, or from the Illinois General Assembly's website: [www.ilga.gov](http://www.ilga.gov).)
- Have a podium and microphone available.
- Legislators should be recognized and address audience prior to chapter business & reports. It's their option to stay throughout the meeting. They may have other appointments or commitments. Work your meeting around their schedule.
- Thank legislators for their support and attendance. Send thank you letters immediately following the event.

**(ON CHAPTER LEADERHEAD, IF AVAILABLE)**

<Date>

The Honorable <First name> <Last name>

State <Senator or Representative>

<Address>

<City, State, Zip>

Dear <Senator or Representative> <Last Name>:

The \_\_\_\_\_ Chapter of Credit Unions will be hosting their annual legislative appreciation <night, breakfast, or luncheon> on <Day of Week>, \_\_\_\_\_, 202\_\_, at the \_\_\_\_\_ in \_\_\_\_\_. This meeting is being held to honor our area legislators that have been supportive of the credit union movement.

We are inviting you and a guest or aide to attend this special legislative appreciation <night, breakfast, or luncheon> to meet informally with your credit union constituents. <details of the event, such as *cocktails are from 6:00 until 6:30 p.m., followed by dinner and a formal program.*>

Legislators joining us will be recognized and asked to say a few words to the audience. Please RSVP to me no later than \_\_\_\_\_.

We are looking forward to meeting with you.

Sincerely,

Your name, chapter title

Your credit union, title

**LEGISLATIVE  
ACTION  
ALERTS**

## ***CREDIT UNION LEGISLATIVE ACTION ALERTS***

One of the duties and responsibilities of the Legislative Forum Representative (LFR) is, "to plan, organize, and coordinate a chapter legislative action network, to encourage credit unions to send emails, or make immediate phone calls or personal visits to lawmakers in case of a legislative emergency." To this end, this section has been developed to serve as an overview of the credit union legislative action alerts as well as to help identify the LFR's role within the network.

The sole purpose of the Credit Union Legislative Action Alerts is to involve as many credit union members in as short a time as possible in a chain of communication to be activated in times of legislative emergency. Beginning at the League office, staff members contact Legislative Forum Reps, who in turn contact either: their Chapter officials; credit union managers within their chapters; or legislative key contact persons from their chapters. Depending upon the issue and the need for emails, phone calls, or letters, the Advocacy Department will inform the LFRs which lawmakers to contact, prescribe the method of contact and message to communicate. A legislative action alert will be distributed from the league office containing the details of immediate action necessary by the LFR.

To enhance the LFR network, on many occasions it is necessary for the Advocacy Department to make direct contact with credit unions after going through the LFR system. Usually, such cases involve high volume of contacts with a lawmaker utilizing credit unions throughout the state. In such cases, the LFR is still encouraged to contact credit unions within the chapter to reinforce the need for immediate action.

## ***STRUCTURE & COMPONENTS OF LEGISLATIVE ACTION ALERTS***

### **LEGISLATIVE COMMITTEE**

The Legislative Committee of the Illinois Credit Union League is responsible for analyzing proposed and/or pending legislation that would impact member credit unions. It is the Committee's responsibility to develop and suggest League positions for consideration by the League Board of Directors regarding all such legislation. The Legislative Committee has responsibility for the overall legislative agenda development for Illinois credit unions.

### **ADVOCACY STAFF**

Regarding the Credit Union Legislative Action Alerts, Advocacy staff have the responsibility for developing the political and legislative strategy necessary to carry out the legislative agenda as proposed by the Legislative Committee and approved by the League Board. Such strategy encompasses lobbying, organizing grassroots support, providing education to member credit unions about proposed legislation and directing the political action network necessary to garner support for credit union legislative objectives.

## **LEGISLATIVE FORUM REPRESENTATIVES**

To assist the Advocacy staff in their efforts to organize an effective political action network of concerned, involved credit union members, the position of Legislative Forum Representative (LFR) was created. Each chapter of the League should appoint a Legislative Forum Representative. LFRs have the main responsibility for carrying out directives of the Advocacy staff regarding legislative alerts. They are, in effect, overseers of the legislative action alerts.

## **CREDIT UNION CHAPTERS**

Regarding the credit union legislative action alerts, individual chapters have a role in enhancing legislative communications with local lawmakers. For example, many chapters invite local lawmakers to events such as chapter legislator appreciation nights, a chapter family picnic or other similar events. Lawmakers are already conditioned to hearing from local chapters of other associations; therefore, local credit union chapters are included in the legislative action network. Specifically, if a chapter has chapter letterhead, it may be very effective to communicate as part of the legislative action network on this letterhead. This illustrates the important role that an individual chapter can play in the legislative alert network and the political process.

## **KEY CONTACTS**

A key contact person is someone who has an extremely close association with a member of Congress or the Illinois General Assembly. A key contact is someone whose name is instantly recognized by the legislator and who would be willing to make a phone call or secure an emergency appointment for credit unions, if necessary. The Advocacy Department should be provided with contact information for each key contact. The key contacts will become a vital component of the credit union legislative action network as well as credit union campaign involvement and other political action programs.

## **LEGISLATIVE ACTION COMMUNICATION**

The League, LFRs, and credit union members will coordinate efforts to inform and influence legislators about specific issues of interest to credit unions. Communication is a key part of the entire legislative action network. It is to be activated when legislative matters of significant importance to credit unions are pending in the legislature that demands immediate attention on the part of legislators. It is designed to provide rapid communication between credit union members and their legislators in times of legislative alerts. The following details are the ways in which communication should work:

1. Once League staff has determined that a legislative alert is necessary, Legislative Forum Reps will be contacted either by phone or e-mail. Forum Reps will receive information concerning the nature of the bill, its impact upon credit unions, its status and the desired action to be taken by legislators.

2. The Advocacy Department will inform the LFR as to whom to contact. In certain cases, a legislator may be targeted as an individual that needs a great deal of attention. In those cases, it may be desirable to contact a specific key contact person, rather than several people. In other instances, the more contacts made, the better. Each bill will have to be handled on an individual basis.
3. The LFRs must be able to contact as many credit union managers within their assigned areas as possible within as short a time as possible, such as by phone, text and/or group e-mail group distribution list.
4. LFRs must impress upon the managers they contact the importance of the issue to the credit union or the credit union movement. They should request the manager to phone or email his or her legislator immediately (or post on social media if appropriate). LFRs must ensure the manager has adequate information regarding a particular issue and the desired action requested by the legislator. Emails, phone calls, or other contact from credit union managers to legislators must be generated immediately in times of legislative alerts. Rapid communication is a must.
5. Of critical importance are the responses received from a legislator regarding a specific contact via email or phone call. These responses should be relayed to League staff.
6. A legislative summary/tracking sheet of League monitored legislation is available on the Illinois Credit Union League website <https://www.icul.com/advocacy/current-issues/>. This information is updated at least weekly during the legislative session.
7. The Capitol Connection is an electronic newsletter designed to provide affiliated credit unions (and chapter LFRs) with weekly updates regarding the status of ICUL's state and federal legislative agendas. This communication is sent out by the ICUL every Friday (as events warrant) while the Illinois General Assembly is in session to provide the latest information regarding the status of bills, compliance and regulatory updates, and any other issues of interest to credit unions. When the Illinois General Assembly is not in session, this newsletter will be sent out to include congressional legislative issues as necessary.

## **ICUL Advocacy Staff**

Patrick Smith, EVP, Chief Advocacy Officer

[Patrick.Smith@icul.com](mailto:Patrick.Smith@icul.com)

Ashley Sharp, Chief Legal Officer & SVP, State Advocacy

[Ashley.Sharp@icul.com](mailto:Ashley.Sharp@icul.com)

Keith Sias, SVP, Federal Advocacy

[Keith.Sias@icul.com](mailto:Keith.Sias@icul.com)

Abby Walsh, Director, Political Action

[Abby.Walsh@icul.com](mailto:Abby.Walsh@icul.com)

Emily Wollet, Governmental Affairs Assistant

[Emily.Wollet@icul.com](mailto:Emily.Wollet@icul.com)

Steve Olson, Consultant

[Steve@olsongc.com](mailto:Steve@olsongc.com)