

Planning a Virtual Legislator Appreciation Event

Chapter legislator appreciation events are a time when chapters invite the legislators that represent their chapter area to an event (breakfast, lunch, dinner, reception) to allow chapter credit unions and legislators to build and enhance relationships. Some chapters hold events jointly with neighboring chapters, other chapters hold individual events.

The COVID-19 pandemic prevented in-person meetings, teaching us that online meetings can be as effective as a traditional in person meeting, often with higher attendance. Leading a virtual meeting requires more coordination on introductions, making the ask, telling the story, and coordinating follow-up.

Scheduling Meetings

Lawmakers have turned to a variety of teleconference platforms such as Zoom, Skype, Google Hangouts, Teams and conference call services to meet with constituents. Some offices may have their preferred platform, while others may defer to yours.

Scheduling these meetings is the same process as scheduling any in-person meeting—book a meeting just as you would if it was in-person.

- Plan the meeting while the Illinois General Assembly is not in session (confirm with Governmental Affairs staff).
- A list of legislators that serve your chapter is available from the League's Governmental Affairs Dept. Contact information is also available from the League or from the Illinois General Assembly's website: www.ilga.gov.
- Invite lawmakers at least 30 days in advance of the meeting date.
- Notify Governmental Affairs Department of date/details. A staff member will participate if possible.
- Follow up the initial invite with a phone call to the legislator's scheduler. Obtain email address in which to send the meeting access information.
- Email lawmakers and attendees the meeting access information a few days prior to the meeting.
- Call to confirm legislators' participation the day before the event.
- Contact Governmental Affairs staff the day before the event with a list of confirmed legislators.

During the Meeting

- Designate credit union official to be the moderator of the meeting.
- Moderator should log into virtual platform approx. 5-8 minutes prior to start time.
- Some legislators will not want the meeting recorded. Keep that in mind as you consider this.
- Make sure all microphones are muted and remind people to mute themselves, and unmute only when speaking.
- The moderator will introduce the legislator(s) and provide an overview of the meeting flow
 - example:
 - introductions
 - legislators speaking
 - pre-selected CU people speaking
 - Q&A if time allows.
- The moderator should introduce each attendee by name and credit union (go around your screen to see who is on). Ask attendee to wave when name is mentioned.
- Moderator will give a little background on credit union mission and difference, number of credit unions in the chapter, number of members they serve, number of members in the legislator's district (this data can be found on CUNA's "public facing" project zip code website: [State \(pzconline.com\)](https://www.pzconline.com) and issues important to them.
- The number of legislators will dictate how much time you want to ask each legislator to talk.
- In advance of the meeting, ask a few preselected credit union people to discuss one or two topics such as (these are just examples):
 - How their credit union serves their community differently than banks
 - How their credit union helps the underserved
 - Provide a story of how their credit union helped a member that couldn't be helped by a bank
 - Describe how their credit union went above and beyond to provide service to members during COVID
 - Products/services different from banks that help their members
 - Other awesome things credit unions do. Toot your horn!
- Thank legislators for their support and attendance. Provide a credit union contact name/information should legislator have follow up questions.
- Designate someone to take screen shots to use for social media. Publicly thanking the legislator's office for meeting with you. Twitter is an effective tool to do so, and it is best to incorporate four things in a thank you message: 1) the legislator's official (not their campaign) handle, 2) a mention of the lawmaker's community, 3) reinforcing the credit union difference, 4) the #CUAdvocacy hashtag.
- Remember to send any additional information or resources that may have been requested during the meeting.