

Draft for Advocates
“Coffee Meeting with an Elected Official”

Overview

Credit union advocates have a unique and important role in our advocacy efforts to spread the word about the important work of credit unions in local communities. GoWest plans many opportunities for you to engage with local, state and federal officials. Whether you attend a Governmental Affairs Conference or Hike the Hill in Washington, D.C. or Credit Union Day at the Capitol, you may have an opportunity to be in a one-on-one conversation with an elected official who may be in a position to review legislation important to credit unions.

However, many advocates attend local town hall meetings or meet with legislators in their district for coffee. This overview should assist you with your talking points plan.

It is important to remember that your advocacy team is in regular communication with legislators, and it is also important to coordinate and communicate with our team before any one-on-one meeting.

Where to Start

We hope credit union advocates will set up their own meetings like having coffee with your legislator or hosting an elected official at your credit union. In preparation for these meetings, we often get asked, “what should we say?”

This document is to give you quick tips when you have your own meeting or event. These are recommendations and meant to be high-level talking points:

- Legislators are just people from their community giving time for public service. Whether you agree or disagree with them personally on issues, in this meeting you are representing all credit unions and it is important to stay focused on credit union issues.
- Legislators are farmers, small business owners, retired teachers and come from all walks of life. There is no reason to be intimidated by their title.
- You are not expected to be an expert on any piece of legislation and if you get questions, you can also refer them back to the GoWest advocacy team.
- You can gather data for any elected official by going to their legislative website or campaign website.

- Finally, connect with your local advocacy team member for any background or information on the elected official. Here are the advocacy team contacts for each state:

Arizona – TBD

Colorado – Katie March, kmarch@gowest.org

Idaho – Zach Forster, zforster@gowest.org

Oregon – Pam Leavitt, pleavitt@gowest.org

Washington – Joe Adamack, jadamack@gowest.org

Wyoming – Bobbie Frank, bfrank@gowest.org

Preparing for Your Meeting

There are two main messages you can share in any meeting:

- a) The Structure, Value and Impact of Credit Unions; and
- b) The role your credit union is playing in their district

Structure, Value and Impact (SVI)

The most important message you can leave any elected official is discussion the credit union difference. This is our way of describing how credit unions operate differently than banks and therefore should maintain the not-for-profit structure. In many meetings with legislators, they may say “I am a member of a credit union,” or “I love credit unions,” but may not understand the structure. By educating them on the not-for-profit structure, they have the background to understand issues bankers may bring up in the Legislature or Congress.

Structure – Cooperative and Not-for-Profit credit unions are owned and driven by the very members using their services. Credit unions’ structure inherently holds them accountable to their members.

Value - Credit unions reinvest their earning back into their members’ households, staying focused on main street, not wall street. This means they’re able to offer tangible benefit such as competitive interest rates and fees.

Impact – As local, not-for-profit cooperatives, credit unions’ commitment to the community is in their everyday DNA. You’ll find us serving in communities large and small, rural and metropolitan.

A one-pager on SVI can be found in the Advocacy Resource Center on our website (gowest.org)

Background and Data on Your Credit Union

In addition to SVI, it is important to gather data from your credit union. Background to share could be examples like business lending data, home loans, special programs to assist members, and community engagement. Don't forget to stay focused on their legislative district. If your credit unions cover several communities, as much as possible, you should give them examples in their districts. Specifically, what kinds of programs at your credit union support their constituents?

Thank them for their time and follow up with any questions they asked and let them know you are a resource for them for any questions.

Conclusion

Building a relationship with a legislator or member of Congress outside the regular time that we engage during a session is an important way to help them understand credit unions. Because they have more time out of a regular legislative session and are "home" in their districts, these meetings are usually preferable to elected leaders. Your actions will go a long way when we are engaged in legislation!

Resources

State Legislative Websites:

Arizona - <https://www.azleg.gov/>

Colorado - <https://leg.colorado.gov/>

Idaho - <https://legislature.idaho.gov/sessioninfo/>

Oregon - <https://www.oregonlegislature.gov/>

Washington - <https://leg.wa.gov/>

Wyoming - <https://wyoleg.gov/>

US House of Representatives:

<https://www.house.gov/>

US Senate:

<https://www.senate.gov/>