A Blueprint for Lobbying

By Susan West Montgomery
For many, the word lobbying conjures up images of back rooms and cigar smoke, back slaps and bags of money. Those images are far from the truth. Casting your ballot in the voting booth may be the most fundamental of democratic acts, but talking to your elected official—lobbying—is the indispensable next step. We send our representatives to Washington, D.C., but unless we tell them what to do when they get there, we have squandered our vote.

Preservationists, like every other group of citizens joined in a common cause, have the prerogative and the responsibility to let members of Congress know that the legislation they enact has consequences, positive and negative, for our historic preservation goals back home. After all, who knows better than we do how rehabilitation tax credits can rebuild our downtowns? Who better to explain the full reach of the Historic Preservation Fund into plans and programs that protect our treasured heritage? Be assured that legislators cannot be counted upon to do the right thing unless thoughtful, well-informed constituents cultivate their support and secure their action through lobbying.

Blueprint for Lobbying is a primer designed to acquaint you with the legislative process, lobbying techniques, and resources available to aid your advocacy. While it focuses on the federal level, its information and recommendations can also be applied to state and local advocacy for historic preservation. Importantly, Blueprint should dispel the myth that lobbying is anything more than simply being a strong voice for heritage sites in your community, a role you play everyday through every action you undertake to preserve historic sites. You can trust your own voice.

Remember, the most fundamental part of lobbying is establishing positive long-term, working relationships with your legislators. You can do that anytime, by meeting with aides to update them on preservation developments and needs, by sending background materials that might be of interest, and by making yourself available to them as a source of information. That way, office staff get to know you and you get to know them. That lays the groundwork for taking specific action when the need or the opportunity arises.

Moving productive, long-term preservation legislation through the notoriously erratic House of Representatives and interminably contemplative Senate can take years; however, it is more than worth the effort. The National Historic Preservation Act, the Historic Rehabilitation Tax Credit, the Intermodal Service Transportation Efficiency Act and its successors took years of hard work and tireless lobbying by preservationists. Yet, each in its own way has reshaped the policy landscape for historic resources and made preservation the goal of many public and private development efforts.

What Is Lobbying?

Lobbying is letting your elected officials know what you, the constituent, want from them.

Lobbying provides members of Congress, statehouses, mayors, and city councils with the information they need to fully understand the consequences of their legislative decisions on constituents and communities.

Lobbying affects a wide variety of issues and problems, which may be as diverse as gun control and historic preservation or nuclear reactors and equal rights.

The right to lobby is protected by the First Amendment of the United States Constitution and, as citizens, we must take advantage of the opportunity to have our voices heard by elected officials at all levels of government. It is the elected official’s duty to fairly represent his or her constituency, but it is the constituent’s responsibility to provide the information to make that possible.
Lobbying is perceived by many as an activity synonymous with influence peddling, payoffs, and other ethically and legally questionable activities. While there have been abuses of lobbying laws and regulations, lobbying is a legal right that most citizens should use if they feel that a bill affects them. It is a tool that can be used to influence public policy in a democratic society. You are a valuable resource for your mayor, representative, and senator.

Congress passes hundreds of bills during each legislative session. To do this, the members need the expertise of professionals to draft the legislation. Your experience—volunteered through lobbying—is essential at this point in the legislative process.

Federal legislation, such as the recently proposed funding for tax changes in tax policy, can directly affect the preservation of your community. When you lobby with facts, figures, and strong arguments, your representative and senators will be able to assess the legislation and make informed decisions about how to vote. Remember, those on the other side of the issue are lobbying too.

Professional Lobbyists and Citizen Lobbyists

The Federal Regulation of Lobbying Act of 1946 defines a professional lobbyist as one who "shall engage himself for pay or for any consideration for the purpose of attempting to influence the passage or defeat of any legislation by the Congress or any State legislature." This definition is quite broad and has been interpreted to mean "some," which causes confusion and fear of lobbying among 501(c)(3) organizations. In fact, such organizations (other than churches or private foundations) may elect to lobby. Allowable lobbying activities are carefully defined and the percentage of income allowed for the influencing of legislation is carefully controlled. An organization may spend up to 20 percent of its first $50,000 of income (dues, receipts, changes, etc.) on influencing legislation. A graduated percent of income on lobbying is also allowed on amounts over $500,000.

If a 501(c)(3) organization engages in grassroots lobbying (see below), its expenditures are further limited to 25 percent of the amount allowed for direct lobbying. A charitable organization is limited to lobbying on issues for which it is chartered.

Restrictions on Lobbying for Nonprofit Organizations

A word of caution to any 501(c)(3) organization: federal law prohibits charitable organizations from working directly for—or advertising support of—the election of a single political candidate, whether federal, state, or local. To do so may cause loss of your tax-exempt status. A 501(c)(3) organization can inform candidates of its positions on issues, can urge candidates to support its positions, and ask candidates to go on record as supporters. Make certain that anything you do for one candidate is done for all candidates.

For example, a statewide preservation organization can lobby to persuade a representative to vote "yes" or "no" on an issue, but it cannot undertake any activities to encourage citizens to vote for or against a political candidate. If it does, it would lose its charitable status.

Professional lobbying is limited in their lobbying activities by a requirement that "no substantial portion" of their activities be used for carrying on propaganda or otherwise attempting to influence legislation. Unfortunately, "no substantial portion" has too often been interpreted to mean "none," which causes confusion and fear of lobbying among 501(c)(3) as organizations. In fact, such organizations (other than churches or private foundations) may elect to lobby. Allowable lobbying activities are carefully defined and the percentage of income allowed for the influencing of legislation is carefully controlled. An organization may spend up to 20 percent of its first $50,000 of income (dues, receipts, changes, etc.) on influencing legislation. A graduated percent of income on lobbying is also allowed on amounts over $500,000.

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Organizations that elect to lobby and wish to take advantage of these lobbying rules must file Form 7568 with the Internal Revenue Service.

Direct Versus Grassroots Lobbying

The Tax Reform Act of 1976 defines "direct lobbying" as the expenditure of staff time and money to lobby legislators directly and to encourage the membership of the organization to do likewise. "Grassroots lobbying" extends beyond the influencing of an organization's membership and attempts to influence the general public to lobby for a specific position on a specific issue. This type of lobbying can include such techniques as a paid full-page ad in a local paper or a paid radio or television announcement.

Following are examples of expenses, attributable to either direct or grassroots lobbying activities, that must be counted toward the lobbying limits: Compensation for all employees or officers engaged in lobbying.

Cost of telephone calls and letters when used to influence legislation or grassroots actions.

Cost of printing, postage, etc. for the portion of the material that is attempting to influence legislation.

Expenses related to overhead (rent, utilities) that is proportionate to the total number of hours employees or officers spend on lobbying activities. Some activities are not considered lobbying, therefore, the...
501(c)(3) organization can engage in these without limitation. For example:
- Contracts that are informational or technical and are given upon request of a legislative, such as presenting testimony before a committee;
- Information given to an organization's own members about legislation of interest—as long as there is no call to lobby;
- Contacts with non-legislative governmental officials, as long as information does not influence legislation;
- Sharing results of nonprofit studies or research.

As these rules make clear, a 501(c)(3) organization can—and should—lobby on preservation issues. The decisions to file depend on the amount of staff time and income that will be spent on lobbying activities.

Understanding the Process

The legislative process simply begins with an idea. It may be an elected official's idea or a campaign promise, or an initiative that has been brought to his or her attention by a constituent, an organization, or even the president of the United States. The idea can already be very well developed and written in legal language, or just in outline form. Often a private advocacy organization or interest group has already prepared the legal language.

The idea is turned into a bill by congressional staff members, either on the staffs of individual members or on the staffs of congressional committees, with the help of specialists in the legislative counsels' offices. The bill is then introduced by a member of Congress—or group of members, called cosponsors—on the floor of the House or Senate. Often there will be a lead sponsor, usually from the opposite party as the lead sponsor, to demonstrate bipartisan support for the bill. The clerk of either the House or Senate assigns a number to the bill when it is first introduced (H.R. designates a bill introduced in the House of Representatives, S. designates a Senate bill). Next the bill is referred to the committee or committees that have jurisdiction over issues dealt with in the bill.

The next steps in the legislative process can stretch over months and even years. Many require more than a single, two-year congressional term for completion of the total legislative process. The vast majority of bills introduced never become law. If a bill does not pass during a two-year term, it "dies" and must be reintroduced during the next Congress.

Types of Legislation

There are three different types of legislation: authorizing legislation, appropriations legislation, and tax legislation. Each has a different purpose and specific set of committees designated to consider the bills.

Authorizing Legislation

The authorizing process is used to introduce new laws and prepare amendments to existing laws. The authorizing committees work on legislation that actually creates the activities that they undertake certain activities. The committees' names indicate their area of authority: Armed Services; Banking, Housing, and Urban Affairs; Budget; Energy and Commerce; Environment and Public Works; Foreign Relations; Judiciary; Transporation and Infrastructure, etc.

Most federal programs are established through the authorizing process to establish programs and to authorize the expenditure of federal dollars, usually with a "ceiling" placed on spending.

Authorizing legislation can originate in either the House or Senate. The National Historic Preservation Act started out as authorizing legislation. A small group of preservationists began the push for the legislation in the summer of 1964, with legislation first introduced in early 1966, following publication of With Heritage So Rich in January of that year. The legislation was enacted into law in October 1966. Authorizing legislation was also needed to amend it a dozen times in the decades that followed.

Appropriations Legislation

The funding of most government programs requires action by the appropriations committees on an annual basis. The committee appropriate revenue for all programs in government agencies, stay within limits imposed by the Congressional Budget Resolution and authorizing legislation. The appropriation committees in both House and Senate are divided into subcommittees such as Commerce, Justice, State and the Judiciary; Defense; Energy and Water Development; Interior; and Labor, Health and Human Services, and Education. The Constitution stipulates that all appropriations measures must originate in the House, with Senate action following. The Historic Preservation Fund, for example, must receive appropriations each year, and the actual amount of the appropriation has fluctuated according to how much the president requests in his budget and how much the Congress—either group of members, called cosponsors—on the floor of the House or Senate. Often there will be a lead sponsor, usually from the opposite party as the lead sponsor, to demonstrate bipartisan support for the bill. The clerk of either the House or Senate assigns a number to the bill when it is first introduced (H.R. designates a bill introduced in the House of Representatives, S. designates a Senate bill). Next the bill is referred to the committee or committees that have jurisdiction over issues dealt with in the bill.

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implies that religious institutions could be exempt from historic preservation ordinances. The National Trust, with the assistance of the New York congressional delegation, was able to get the following language added to the manager's statement: “This Act does not provide religious institutions with immunity from land use regulations, nor does it relieve religious corporations from applying for variances, special permits or exceptions, handrail approval, or other relief provisions in land use regulations, where available without discrimination or undue delay.” (A longer statement of the type used in this typical case, rather than a traditional committee report, because the bill passed by unanimous consent in both houses without any committee action required.) This added language may prove to be useful in any future legal challenges.

Full Committee
When the full committee considers the bill, further changes may be made. When changes are made, a committee member must take notice. An affirmative majority vote means that a bill is "reported out of the committee" and is ready to go to the House or Senate floor for further action. When a bill has been reported, a report is written by the committee staff to give the full legislative body details of action taken. This report is available to the public (including on Thomas, the Internet resource described on page 8).

The report is valuable in determining the "intent of the committee" in its decision making. For example, when it was first drafted, the language of the Religious Land Use and Institutionalized Persons Act had no "mark-up" completed, a vote was taken if passed, the bill went to full committee.

House or Senate Floor
Legislation can be amended again just when it reaches the floor of either the House or Senate. Following approval on either floor of Congress, the bill is automatically sent to the other chamber. It is referred to the appropriate committee and subcommittee. Complaints bills—or bills concerning similar issues—often move through both the House and Senate simultaneously.

Conference Committee
If both chambers pass identical versions of the bill, the bill must be apportioned by the Speaker, and conferences representing the Senate and House are appointed by the majority leader. The conferences meet to consider the points of difference. During conference, new provisions that exceed the "scope" of the two original bills can be introduced, but if the final version may include compromise language that differs from either House or Senate versions.

Final Floor Vote
After Conference Committee action is completed, both the House and Senate must take a first vote on the conference bill.

President's Signature
The president has 10 days (not counting Sundays) in which to sign or veto the bill. (If your lobbying effort is late too far, a decision may have already been made.) If you lobbied too early, the impact of the lobbying effort may have been lost in the intervening time. The president does not sign within 10 days, the bill automatically becomes law. If Congress has adjourned and there is no signature within 10 days, the bill is "pocket-vetoed" and will not become law.

Congress can override a presidential veto with two-thirds votes in both chambers. A bill can be defeated at any point in the process by a negative vote, or may "die" from lack of action. If no final action is taken before the end of a congressional term (each term consists of two one-year sessions), the bill must be reintroduced in the next term.

In 2000, the House of Representatives, by a vote of 315 to 102, passed the Conservation and Reinvestment Act which would have fully and permanently funded the Historic Preservation Fund at $150 million annually. The Senate Resources Committee favorably reported the same bill to the Senate floor where it met significant opposition from some members. Shortly thereafter, 63 Senators signed a letter asking the Senate majority leader to bring the bill up for a vote. However, the 106th Congress was drawing to a close and the leader declined to act on the bill saying he feared that debate over the measure would divert the Senate's attention from more important matters. The final version included compromise language that differed from either House or Senate versions.

Appropriations Schedule
Appropriations bills offer a good example of how considering the timing of your advocacy can make it more effective. In June of each year federal agencies begin to plan for their next fiscal year's budget. By August, their budget requests must be presented to their respective directors and then are sent to the Office of Management and Budget (OMB). After considering overall spending levels and the specific requests from each agency, OMB returns the budget request to each agency usually with requests for modifications. Each agency can appeal OMB's decisions, but the final plan is normally locked in by December. The first week of February, the president submits his budget to Congress. Between March and May the House and Senate Appropriations Subcommittees meet, hear testimony, and then prepare their own spending plan which is often very different from the president's. By August, most appropriations bills have been passed by each chamber and the bill is spent reconciling any differences between the House and Senate. It is highly recommended to contact contact key members in any negotiations with your members. The Senate Resources Committee should include a clear statement of the action you would like them to take.

Make a Specific Request
First, why are you contacting the member in the first place? What, very specifically, do you want him or her to do? Introduce a bill? Become a cosponsor? Vote to keep a committee or on the floor in favor of a bill or amendment? Contact another key member? Any contact you make with your member should include a clear statement of the action you would like them to take.

Have Accurate Information
It is important to know as much as possible about the bills which you are lobbying. Your case will
Finance Committees write tax bills. However, legislation with implications for preservation may come up in any committee; for example the judiciary committee has jurisdiction over property rights and religious liberty initiatives.

If your representative or senator is on the committee that has jurisdiction over the bill you are lobbying, contact him or her and ask support for your position.

If not, determine whether or not a member of your state congressional delegation is on the committee. If so, contact that member and/or ask your own member of Congress to speak to that committee member on your behalf. When communicating with representatives from other districts in your state, you'll make more headway if you can tell them that many of their own constituents are part of your organization or can be shown to agree with your position.

If your state is not represented on the committee, ask your congressman or senator to speak with the chairman or members of the committee to endorse your position.

Remember, a bill must be passed by both the House and the Senate. If your representative is not sympathetic to an issue, lobby your senator and vice versa.

Who Do You Contact and How

Washington, D.C., Office
Your first call to the office of a member of Congress is likely to be directed to the legislative assistant who handles preservation issues. The receptionist may not immediately know who that is, unless your member has consistently been involved with preservation issues.

Members of the House have 18 staffers, about half of whom are likely to work in Washington and half in various offices in their home districts. More senior members will also have staff on the various committees on which they serve, and these committee staff members will sometimes handle preservation issues for their member. Only 1 to 3 of these 18 staffers are legislative assistants who provide policy research and analysis services, so they must each cover a broad range of issues and can't be deeply engaged with very many of them.

Legislative assistants are generally scrambling to assemble briefings on short deadlines and not inclined to engage in extensive discussions or policy debates with constituents. They want concise, well-organized presentations, including material on how this issue plays out in their member's district. They do not want long position papers that will take huge amounts of time to read and then summarize.

When meeting with congressional staff in Washington it is useful to bring materials to illustrate your point. Here Maryland preservationists meet with Charlie Sek of the office of Senator Paul Sarbanes during the annual Preservation Action Lobby Day.

District Office
Senators may have six or so offices around their state. A congressman in a small district will only have one, in a larger district, two or three.

Staff members who work in the district office are not directly involved in the legislative process, however, they are a valuable lobbying resource. The district office is readily accessible and the staff is familiar with local issues. Usually the district director or
Writing to your Representative or Senator

To address and start a letter to a senator:
The Honorable Jane Smith
United States Senate
Washington, D.C. 20510

Dear Senator Smith,

To address and start a letter to a member of Congress:
The Honorable John Doe
United States House of Representatives
Washington, D.C. 20515

Dear Mr. Doe,

To close a letter to a senator:
Sincerely yours,

another senior advisor is the member’s eyes and ears in the district and provides important feedback on the priority of local issues. The member’s schedule in his home district is usually arranged by these offices as well. Use them often!

To locate the district offices, look in the “government” section of your local phone book, contact Preservation Action, or log onto Thomas.

Lobbying Techniques

Lobbying in Person in Washington, D.C.

When you are in Washington, D.C., you should contact your represent-ative and senators. If your elected official is unable to see you, make an appointment to meet with the staff person who is working on preservation-related issues. Some members of Congress do not have aides assigned specifically to preservation, so you should ask to speak to the aide in charge of housing, taxes, appropriations, etc., about a preservation-related matter.

The following suggestions will help ensure that your meeting is productive:

Before

• Schedule an appointment in advance by calling your member of Congress’s scheduler. Be firm in your request to see the member. If you have trouble getting time to see the member, consider talking to the chief of staff about your desire for a meeting, or plan to meet with the staff person who works on preservation issues.

• Prepare and send beforehand a memorandum or agenda that outlines what you plan to dis- cuss at the meeting and who will be attending. Staff will appreciate the opportunity to familiarize themselves with the issues and brief their boss. Include bill numbers when ref- erencing particular legislation.

• Gather any background mate- rial that may be useful, including some mementos of a preser- vation project—a poster, arti- fact, or the like.

• Recommit a week or so before the meeting.

• If several people will be attend- ing the meeting, coordinate your remarks in advance, in- cluding deciding who will take the lead and how.

During

• Bring copies of your memo- randum/agenda and a list of meeting participants, including contact information for each, to hand out at the start of the meeting. Present any mementos you have brought.

• Acknowledge the member’s support for preservation.

• Get to the point of the meeting quickly, be succinct, and keep the meeting as informal as possible.

• Discuss the bill by using its number and title. If you are not lobbying on a particular bill, be specific about what you want the member to do for you.

• Use specific examples from your member’s state or district to support your point.

• Bring materials to illustrate your point. It is always a good idea to have some concrete reminder of your visit for the staff or member to refer to later. A one-page briefing sheet is particularly effective.

• Be prepared to answer ques- tions on preservation, not the legislative process. Remember, you are the preservation expert; you know more about preserva- tion than they do.

• Always look for opportunities to be of service to the member. For example, offer to send follow-up information regard- ing issues that come up during the meeting.

• Suggest a follow-up such as a meeting in the district or with the district office, or offer to keep the member regularly updated on what you have dis- cussed. Ask the member who your point of contact should be on the matter.

After

• Send a thank-you note to both the member and the staff along with any additional materials you have offered to provide. Use the note to briefly restate and reinforce your arguments.

• Publicize the visit. Include a story in your organization’s newsletter. Send photos and press releases to the local newspaper.

• Let Preservation Action and your state and local preservation organizations involved in the issue issues know about the meeting and what was discussed.

• Stay connected with your mem- ber and staff person, and work to cultivate the member as a preservation champion. Think of creative ways to involve your member in preservation-related activities, such as the special events suggested below.

Lobbying by Letter and Fax

A representative or senator can gauge constituent sentiment by analyzing the mail received on the issue. Both the quantity (in- cluding the form—letters, faxes, e-mails) and the quality of letters are important.

Since members of Congress receive thousands of letters each year, the most elegant and per--suasive lobbying letter may not get the attention it deserves if it is too long or illegible. The fol- lowing suggestions will maximize your letter’s effect:

• Type-written letters—or very neatly handwritten letters—are a must.

• Discuss only one issue per letter.

• Keep letters to one page.

• Mention the bill number, its title, and the area of your con- cern in the first paragraph.

• Relate the legislation to a local issue or law, and use local examples to show the effect on the district.

• Ask a specific question about the bill or issue. This will in- crease the chances of receiving an individual response, not a form letter.

• Always request a specific action, for example, “Please vote ‘Yes’ on H.R. 111”.

When writing to a member of Congress, always request a specific action.

In this letter, the Preservation League of New York State encourages its representative to co-sponsor the Historic Homeownership Assistance Act. Illustration reprinted with the permission of the Preservation League of New York State.
Organizations often join together in lobbying alliances to achieve common goals on a specific issue. Here representatives from Vermont’s department of tourism and marketing and Vermont’s state historic preservation office meet with Senator Patrick Leahy to discuss Vermont Heritage Tourism initiatives and to lobby for a general Vermont tourism effort being undertaken by their offices.

1. State the reason for your call by bill number and/or subject
2. Ask a specific question or request a specific action
3. Relate the bill to a local example or problem
4. State your position as “for” or “against” the bill
5. Ask where your congressman stands on the issue
6. Follow up the phone call with a letter

Representatives’ and senators’ offices in Washington can be reached by calling the U.S. Capitol switchboard, Dial 224-3121 and ask the operator for your congressman’s office.

Lobbying by E-Mail

All senators and representatives now have e-mail and most have web sites. However, many offices have not yet become proficient in acknowledging and tracking e-mails. Although an e-mail is effective in registering your opinion (all positions “for” and “against” are registered by staff members), it is not as effective in making the case or attempting to inform or influence a member’s opinion. Using e-mail to communicate with a congressional office may work well if you have established an ongoing relationship with that office, so that the staff who receives your e-mail will recognize your name. Otherwise, use e-mail only when the issue is of the essence, for example when your e-mail is pending or, if you cannot make the time to write a formal letter. If you do send an e-mail, write something very specific in the subject line. A staffer will be more tempted to delete or forward an e-mail before opening it if he or she doesn’t know what it is about. In the e-mail message, be sure to include all your contact information such as street address, telephone number, and title and organization if appropriate.

Lobbying the District Office

Asking for a meeting with the member in his or her district office, or inviting the member to visit a preservation venue, can be a very effective way to get his or her attention. Although always best, most members can pay better attention when they’re “back home” and don’t juggle the many conflicting demands of their Washington schedules. Often, scheduled Washington meetings with members are actually delegated to staff when the member is called away to a floor or committee vote, or for some other urgent legislative action; this kind of scheduling difficulty is usually not a problem in the home district. In cases when the issue you want to discuss has a large local impact, it may make sense to meet with the member’s district staff. As a general rule, policy research and advice is provided by the Washington staff, but when there is a large local discussion on an issue, the district office director or other key staff may be able to weigh in with a local perspective. If you meet with staff in the district office, request that your comments be conveyed to the Washington office and also write your representative or senator giving a brief outline of your meet- ing and the specific recommendations made to the district staff.

Lobbying Coalitions

Organizations often join together in lobbying alliances to achieve common goals on a specific issue. Local and statewide preservation and conservation organizations make good lobbying partners. A jointly written or co-signed lobbying letter from a group of organizations is especially effective as it indicates unity on an issue.

The Media and How to Use It

Increased public interest in historic preservation is resulting in greater coverage by the media. Publicity will not only dramatically increase your preservation efforts to the community, but will alert your representative and senators to the growing support for preservation among their constituents.

Seed your media coverage that supports your position to the offices of your representative or senators. The staffers there may not have seen the coverage. Even if they have, receiving the same information from several sources can increase its impact. There are several ways to encourage media attention, whether you are working with newspapers, television, radio, magazines, or wire services.

News Releases

A news release is the easiest way to disseminate information to the media. Because hundreds of news releases are received every day, yours must be timely, brief, and noteworthy in order to gain the attention of editors and producers. Remember to include the who, what, when, where, and how of your story. Your chances of success increase when you hand-deliver your news release and make a personal contact.

Editorials

An editorial in a newspaper—or a commentary on television—lends credibility to an issue. While editors raise the awareness of those who read or hear them, they can be either favorable or unfavorable to your position on the issue. If the editorial is favorable, follow up with a letter to the editor supporting the position; if the editorial is unfavorable, answer all points in a succinct, reasonable way in a prompt response.
• Hold a tour of a rehabilitation tax credit project and invite an elected official as a guest of honor/ribbon cutting award presenter.

• Hold a workshop or conference on a lively preservation issue.

• Organize a special event (such as a tour, fundraiser, or holiday celebration) in a restored house, a rehabilitated building, or a revitalized neighborhood that has broad local interest.

• Schedule a news conference to draw attention to a special event or the preservation issue and invite elected officials supporting your position to make statements.

• Notify the press in advance and distribute press packets before, and when necessary at, the event.

At the event, assign one person to assist the media.

Lobbying During Election Time

Electoral time and congressional campaigns offer a perfect opportunity for grassroots lobbying. Candidates of both parties will spend time in their districts, giving you the chance to attend candidate forums, debates, or coffee gatherings to ask for their views on preservation. These public forums will expose preservation issues and the candidate's stand on them to a broader audience. This is also the time to submit questions on preservation to candidates during meetings, "call-in" radio shows, or when they are canvassing a neighborhood. Try to elicit specific commitments of support. These become powerful lobbying tools later.

Special Events

Special events will generally attract local media attention. To generate coverage, you could:

Op-Eds

The "Op-Ed" page will often publish articles supporting a position on an issue if the author is well known in his or her field or community. Encourage respected community members who support preservation to write such articles. You can help them by providing a suggested outline or a list of talking points.

Letters to the Editor

Letters to the editor can be an excellent forum for your message. If the editor receives enough letters on a subject, the paper will likely publish some of them. Letters that are short, constructive, well-written have the best chance of being published.

Weekly legislative update sent by e-mail or phone, timely lobby alerts; a quarterly newsletter, occasional "lobbying tips" series with in-depth analysis of particular issues.

Since its incorporation as a 501(c)(3) tax-exempt organization in 1974, Preservation Action has lobbied for:

• Federal appropriations for the matching grants that flow to the state preservation programs. National Trust for Historic Preservation, and other agencies.

• Tax incentives to keep rehabilitation competitive in the marketplace with new construction and other investment opportunities.

• Support for the National Register of Historic Places and the Advisory Council on Historic Preservation.

• Large transportation and resources protection packages that could benefit communities and historic places.

• New bills that directly and indirectly protect and preserve historic properties, by creating jobs, saving energy, improving the livability of our communities, and enhancing the quality of life for all citizens.

Resources

Preservation Action is a grass-roots, public interest, non-profit lobbying organization that focuses on legislation at the national level. Preservation Action, with a small professional staff in Washington, D.C., monitors all federal legislation and regulations, and alerts its members when lobbying action is needed. The organization arranges for members to testify at congressional hearings, coordinates national "Preservation Lobbying Days," presents issue papers to Congress, and expends plenty of "shoe leather" on Capitol Hill. Preservation Action members receive: PAWatch, a

weekly legislative update sent by e-mail or phone, timely lobby alerts; a quarterly newsletter, occasional "lobbying tips" series with in-depth analysis of particular issues.

Legalize Issue Papers, with up-to-date information on preservation legislation, including status, cosponsors, legislative history, and talking points.

One-page briefing papers, similar to the Issue Papers, but appropriate to leave with the member of Congress.

PAWatch, weekly legislative updates.

Coordinates visits to Capitol Hill. If you are planning to lobby on Capitol Hill, call Preservation Action to coordinate your visit with others from your state.

Coordinates and distributes resources for a national preservation lobbying network. Originally formed in 1980 by Preservation Action, this network has rapidly increased in both size and effectiveness. Today, thousands of people across the country, including representatives of statewide and local preservation organizations, take an active part in this national lobbying effort.

Sponsors and leads National Lobby Day. This annual spring event brings preservationists from across the country to Washington, D.C., to get training in lobbying and then meet with their representatives and senators on Capitol Hill. It is open to any interested person.

Can answer specific questions by phone or e-mail regarding federal legislation under consideration, how to lobby on it, who to contact, and how to reach them.

Contact:

Preservation Action
1054 13th Street, NW
Suite 526
Washington, DC 20007
(202) 398-6180
(202) 398-6182 fax
mail@preservationaction.org
www.preservationaction.org

National Trust for Historic Preservation
The National Trust works with citizens and legislators around the world to ensure that public policies protect our heritage and create better communities. At every level of government—federal, state, and local—the National Trust provides advice and information about how laws and regulations can support preservation and the benefits it brings. The National Trust for Historic Preservation is a non-profit organization that works to advance the preservation policy agenda at the federal level through direct and grassroots lobbying. The National Trust advocates for public policies that benefit historic preservation through:

• tax credits for rehabilitation of historic commercial and residential properties;

• increased appropriations and federal funding for the national preservation program;

• preservation of historic sites;

• rehabilitation of transportation-related historic sites, such as historic bridges;

• preserving livable communities and preventing urban sprawl;

• preserving cultural resources located on federal lands and in our national parks.

Preservation Advocate News is a monthly newsletter produced by the National Trust for Public
Policy Department that provides an in-depth look at historic preservation issues in Congress, state legislature, and city halls. It informs and mobilizes The Trust’s network of preservation advocates and encourages participation in public policy advocacy campaigns. Anyone can receive Preservation Advocate News free of charge. Visit our Congressional Advocacy Center web page to sign up; or, signing up, you’ll also become part of the National Trust’s Preservation E-Mail Advocacy Network. To sign up directly for e-mail delivery, visit the National Trust web page at www.nps.org and click on Congressional Advocacy Center and follow the links to “Action E-List.”

Contact:
National Trust for Historic Preservation
Department of Public Policy
1790 Massachusetts Avenue, NW
Washington, DC 20036
(202) 588-6254
(202) 588-6208 fax
www.nationaltrust.org/issues

National Alliance of Preservation Commissions
The National Alliance of Preservation Commissions (NAPC) has a clear mission: to build strong local preservation programs through education, training, and advocacy. The NAPC currently operates two programs that are critical to the advancement of that mission. The first is the publication of The Alliance Review, a newsletter produced six times per year. The Alliance Review is a primary benefit of membership in the NAPC, and offers information on a variety of topics that are specific to the needs and interests of local preservation commission members. The NAPC’s CAMP (Commission Assistance and Mentoring Program) is an on-site, regional training program for commissioners and staff. CAMP instructors educate attendees in a variety of topics—from legal procedures to advocacy methods to public relations—and also facilitate the exchange of ideas between the mostly volunteer citizens who serve on or staff local preservation commissions. Direct advocacy activities are focused in two general areas: advocating for legislative actions that enhance the work of local commissions, and advocating for general funding and program support at federal and state levels. The NAPC supports the agenda of more politically active partners through letters and testimony on a case-by-case basis, and by maintaining a roster of politically active commissions in each state.

Contact:
National Alliance of Preservation Commissions
PO Box 1605
Athens, GA 30603
(706)583-0320 fax
napc@arches.uga.edu www.arches.uga.edu/napc

National Conference of State Historic Preservation Officers
The National Conference of State Historic Preservation Officers is a nonprofit, 501(c)(3), professional association representing the state historic preservation officers in the 59 states, territories, and the District of Columbia. The state historic preservation officers carry out the National Historic Preservation Act (16 USC 470) for the Secretary of the Interior. The primary legislative priority of the National Conference are:
- full funding from the Historic Preservation Fund at the authorized level of $100 million annually (P.L. 106-208) for states (local governments through state allocations) and tribes to carry out the National Historic Preservation Act;
- keeping the promise of the Historic Preservation Fund for permanent, dependable funding through a vehicle such as the Conservation and Reinvestment Act; and
- incentives for homeowners rehabilitating a principal residence similar to that available for commercial property through a vehicle such as the Historic Homeownership Assistance Act.

The state historic preservation officers published A Blueprint for Lobbying in 1984. It was written by Mona B. Ferroga, edited by Nelie L. Longsworth with Julia Churchman, Kathryn Nichols, Elle Wynn, and Chas A. Miller, III contributing. The 2002 edition of Blueprint was substantially revised and updated by Susan West Montgomery, President of Preservation Action, a grassroot, public interest, national lobbying organization in Washington, D.C. The author would like to thank those individuals who contributed to this publication including Patrick Lally, Nellie Longsworth, Gordon Kerr, Barnum Pahl, and Keri Robben.

Coordinated Efforts
Representatives from the national coalition of state preservation organizations headquartered in Washington meet on a regular basis to discuss policy plans and strategies, and synchronize the lobbying activities of each group’s members. When there is a need for immediate lobbying action, each group in the committee calls in network system into action. These groups include:
- American Cultural Resource Association
- American Institute of Architects
- Coalition of National Archeological Societies
- National Alliance of Preservation Commissions
- National Conference of State Historic Preservation Officers
- National Trust for Historic Preservation
- Preservation Action
- Society of Architectural Historians
- Society of American Archaelogists

Acknowledgments
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Glossary of Terms
Act—Legislation that has passed both houses of Congress and has been signed by the president, or passed over his veto, thus becoming law.
Adjudgment Sine Die—Adjudgment without a definite day fixed for recovering, literally “adjudgment without day.” Usually level of $100,000 or $250,000 adjournment of a session of Congress. A session can continue until noon January 3rd of the following year, when a new session usually begins.
Amendment—Proposal to alter the language or stipulations in a bill or resolution.
Appropriation Bill—A legislative act authorizing the expenditure of a specific amount of public funds for a group of federal programs. All appropriations bills originate in the House of Representatives.
Authorization Bill—Authorization of a program, specifying its general aim and conduct and, unless “open-ended,” putting a ceiling on amounts that can be used to finance it. Usually enacted before an appropriation bill is passed.
Bill Status—The stage of progress of a bill in the legislative process, i.e., a description of its progress and activity already accomplished and actions on a bill.
Budget—The document sent to the Congress by the president in late January or early February of each year, estimating revenues and expenditures for the coming fiscal year beginning on October 1 and recommending appropriation. The president's budget message is the basis for congressional hearings and legislation on appropriations.
Cloture—The process by which debate can be limited in the Senate, either by a two-thirds vote or by unanimous consent. A motion for cloture can apply to any measure before the Senate, including a proposal to change the chamber's rules. It is put to a roll-call vote one hour after the Senate meets on the second day following introduction of the motion. If voted, cloture limits each senator to one hour of debate. Some votes are required to invoke cloture.
Companion Bill—A piece of legislation considered in one house of Congress, which is identical or similar to legislation in the other house.
Conference—A meeting between the representatives of the House and Senate to reconcile differences between the two houses over provisions of similar bills that have been passed by each chamber. Members of the conference committee are appointed by the Speaker and the president of the Senate, and they carry the name "conferees" for their respective chambers. Informally, they may also be referred to as "conferences."
Continuing Appropriations—When a fiscal year begins and the Congress has not yet enacted all the regular appropriation bills for that year, it passes a joint resolution "continuing appropriations" for government agencies at rates generally based on their previous year's appropriations.
Filibuster—A time-consuming tactic used by a minority in an effort to prevent a vote on a bill that they believe will pass if brought to a vote. The most common method is to take advantage of the Senate's rules permitting unlimited debate, but other forms of parliamentary maneuvering are used. The stricter rules in the House make such delaying tactics much more difficult there.
Fiscal Year—The 12-month period of government financial operations beginning October 1st and ending September 30th. It carries the date of the calendar year in which it ends.

H.R.—House of Representatives. These initial are used before the identifying number of a bill introduced by the House (i.e. H.R. 1234).

Hearings—Committee sessions for hearing witnesses. At hearings on legislation, witnesses usually include spokespeople for interests affected by the bills under study. Hearings conducted as part of special investigations involve large numbers of witnesses. Committees sometimes use their subpoena power to summon reluctant witnesses. The public and press may attend "open" hearings, but are barred from "closed" or "executive" hearings.

Joint Committee—A committee composed of a specified number of members of both House and Senate, usually investigative in nature. There are a few standing joint committees, such as the Joint Economic Committee.

Joint Resolution—An official act requiring the approval of both houses and the signature of the president and having the force of law. There is no real difference between a bill and a joint resolution. The latter is generally used in dealing with limited matters, such as a single appropriation for a specific purpose. Joint resolutions are also used to propose amendments to the Constitution when entitled by three-fifths of the states.

Majority Leader—Chief strategist and floor spokesperson for the majority party in either chamber.

Majority Whip—In effect, the assistant majority leader in the House or Senate. Helps marshal majority forces in support of party strategy, particularly in rounding up votes on the floor and conducting vote counts in advance of floor consideration to determine where the party stands.

Marking Up a Bill—Considering amendments to a measure in committee, taking it section by section, revising language, penciling in new phrases, etc. If the bill is extensively revised, the new version may be introduced as a separate bill, with a new number.

National Historic Preservation Fund—The Department of Interior's matching grant program funding the states, tribes, and certified local governments, and making grants to the National Trust for Historic Preservation for specific projects.

Overide a Veto—A two-thirds roll-call vote in each chamber that sets aside a presidential veto.

Pocket Veto—The act of a president in withholding his approval of a bill after Congress has adjourned—either for the year or for a specified period. When Congress is in session, a bill becomes law without the president's signature if he has not acted upon it by 10 days (Sundays excluded) after receiving it. If Congress adjourns within that 10-day period, the bill is killed without the president's formal veto.

Proxy—The authority given by one congressman to another to cast his vote on a legislative measure in a committee markup. Proxy voting is not allowed on the floor of the House or Senate.

Recess—Distinguished from adjournment in that a recess does not end a legislative day and therefore does not interfere with unfinished business. The House, which operates under much stricter rules than the Senate, usually adjourns from day to day. The Senate often recesses.

Report—Both a verb and a noun, as a congressional report. A committee, which has been examining a bill referred to it by the parent chamber, "reports" its findings and recommendations to the chamber when the committee returns the measure. The process is called "reporting" a bill. A "report" is the document setting forth the committee's explanation of its action. House and Senate reports are numbered separately and are designated H.Rept. or S.Rept. Conference Reports are numbered and designated in the same way as committee reports.

Resolution—A simple resolution, designated H Res or S Res, deals with matters entirely within the prerogative of one house or the other. It requires no further passage by the other chamber nor approval by the president, and does not have the force of law. Most resolutions deal with the rules of one house.

Rule—The term has two specific congressional meanings. A rule may be a standing order governing the conduct of House or Senate business and listed in the chamber's book of rules. A rule with duties of officers, order of business, admission, to admission, the floor, voting procedures, etc. In the House, a rule also may be a decision made by its Rules Committee about the handling of a particular bill on the floor. If the rule is adopted by the House, the temporary rule becomes as valid as any standing rule, and lapses only after action has been completed on the measure to which it pertains.

S.—Senate. This letter is used before the identifying number of a bill introduced in the Senate (i.e. S.3456).

Special Session—A session of Congress after it has adjourned sine die, completing its regular session. Special sessions are convened by the president of the United States under his constitutional powers.

Supplemental Appropriations—Normally are passed by the regular appropriation to meet unanticipated and generally emergency expenses.

Veto—Disapproval by the president of a bill or joint resolution, other than one proposing an amendment to the Constitution.
Form For Reporting Meetings on the Hill to Preservation Action

Your name: ___________________________ Date of meeting: ___________________________

Name of those who lobbied with you (name and phone):

____________________________________________________________________

____________________________________________________________________

1. Visited office of: ___________________________ State ______ District ______

2. Talked to (name and title of all who were present from office):

____________________________________________________________________

____________________________________________________________________

3. Subjects discussed:
   a) __________________________________________________________________
   b) __________________________________________________________________
   c) __________________________________________________________________
   d) __________________________________________________________________

4. Brief summary of major points:
   Member's/staff’s attitude (if expressed) and your general impression of his/her interest in preservation issues (particularly note any commitment to introduce/support/oppose specific legislation). If known list preservation projects, local success stories, or historic districts and landmarks in the member’s district.

____________________________________________________________________

____________________________________________________________________

____________________________________________________________________

5. Is follow-up necessary?
   Did you promise that Preservation Action would contact or provide additional information? If so, please specify:

____________________________________________________________________

6. Other comments. Please use the back of this sheet.

Return by mail, fax, or e-mail to:
1054 31st Street, NW
Suite 526
Washington, DC 20007
(202) 298-6180
(202) 298-6182 fax
mail@preservationaction.org