

FEB. 27-MARCH 1, 2023
WASHINGTON, D.C.



Meeting Protocol
+
Updates and Social Media

#FOTH2023



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- **Opening Remarks + Introductions**
- **Meeting Prep + Coordination**
- **Meeting Etiquette**
- **FOTH Meeting Talking Points Brief Review**
- **What to Expect + Do's and Don'ts**
- **Being Social at #FOTH2023**
- **#FOTH2023 Programming Update**

Today's Speakers:

- *Matthew L. Evans, Senior Director of Public Policy
United Philanthropy Forum*
- *Sally Schaeffer, Founder + Principal, Uncorked Advocates*
- *Tirrea Billings, Communications Manager, United Philanthropy Forum*



Foundations on the Hill: *Meeting Coordination*





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Meeting Coordination

Identify Your Target Advocates and Team Members

- Reach out PSO members
- Focus on Top Advocates from Past #FOTHs or Meetings with MOCs
- Survey Members

Organize Trainings

- Give members 101 overview
- Lift up ways to be involved
- #FOTH participation only one aspect of ongoing advocacy

Scheduling Meetings

- Identify Proper Staff Contact
- Be Patient & Flexible
- Follow-Up and Always Communicate Changes



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Meeting Coordination

Connect #FOTH Advocates + Team Members

- Schedule Prep Meetings Prior to and During FOTH
- Connect via Swapcard (Team Huddles)
- Create online community/Email threads

Identify Meeting Roles

- Group Leader
- Note Taker
- Storyteller

Prep Branding For Meetings

- Leave Behind Packets
- Organizational Pins on Lapels
- Business Cards



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Meeting Etiquette

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Meeting Etiquette

Recommended Format

- Each FOTH Team will have a Team Lead.
- Limit of four designated speakers per meeting.
- All other participants should take notes.
- Your FOTH Team should meet in advance. Have a plan, but be flexible!



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Meeting Etiquette

Tips for Success

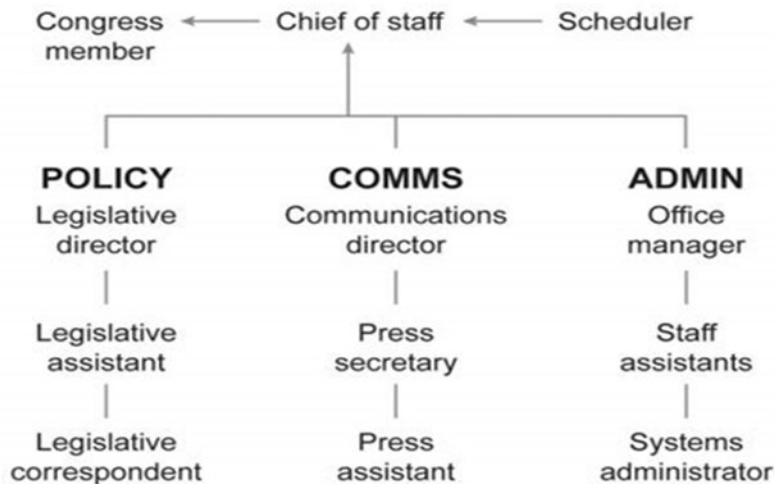
- Don't speak all at once!
- Recommended dress is business on Capitol Hill
- Don't multi-task!
- Be mindful of the staff's time.
- Prep for time in between meetings



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Congress and Staff

Typical Congressional office org chart





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Meeting Etiquette

Telling Your Story

- Be clear and concise with your story: Think Jack and Jill
- Paint a picture- Why is this important to the communities you serve?
- Connect the story to the “Why”

Meetings Notes

- Identify and Log “Friendly” Legislators/Staff
- Makes it Easier to Follow-Up
- Share with Forum Public Policy Staff



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Meeting Etiquette

The “ASK”

- Tell them what you want
- What action can the Member take? Use Legislative Priorities if unclear
- Support issue, cosponsor legislation, write a letter
- Emphasize ask again and follow-up



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**Talking Points and Key
Messages**

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#FOTH2023 Key Messages

- The Value of Philanthropy & How We Collaborate
- Public Policy & the Philanthropic Sector
- Philanthropic Sector's Legislative Focus



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#FOTH2023 Sector Legislative Focus

Stronger Charitable Giving Incentives

- Congress should restore and expand the universal charitable deduction, which was created most recently in bipartisan COVID relief legislation and extended on a bipartisan basis through 2021.
- Every American's access to the charitable deduction is a matter of fairness. It helps charitable organizations achieve their missions and support their workforce and communities.
- Although Americans will give to nonprofits without any giving incentives, these incentives have been proven to encourage Americans to give more, helping communities in need.



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#FOTH2023 Sector Legislative Focus

Nonprofit Seat at the Table Legislation

- The nonprofit sector is America's third-largest employer and has been a trusted partner to government, but unlike all other sectors it has no formal seat at the table within government.
- In the previous Congress, H.R. 7587 – the Nonprofit Sector Strength and Partnership Act – proposed establishing a White House Office on Nonprofit Sector Partnership, Interagency Council, and Advisory Board comprised of nonprofit sector leaders. This three-part structure would leverage the knowledge, trusted status, and reach of nonprofits to craft and implement better solutions for all



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#FOTH2023 Sector Legislative Focus

Advocating For Vibrant Communities

- In addition to providing funding and resources to communities across the country, the charitable sector's voice is critical to advocating for policies that help those communities thrive, long term.
- As a sector we support practical public policy solutions that catalyze a just and equitable society where all can participate and prosper.
- Post-graduation scholarship grant programs can stimulate regional economic growth, strengthen a community's workforce, and help address the growing student debt crisis. Federal law should treat post-graduation scholarships like traditional scholarships, a charitable activity."



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Questions
+
Answers

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What Expect on the Hill

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What to Expect on the Hill

Hill Meeting Expectations

- Don't be disappointed with a staff-level meeting.
- Get to the office a few minutes early!
- Don't be surprised if the staff is running behind.
- Understand time constraints.
- Be flexible!



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What to Expect on the Hill

Meeting Do's + Don'ts

DO:

- Be prepared
- Be open to chit-chat, but mindful of time
- Connect story to ask
- Leave time for questions/conversation

DON'T:

- Say anything you are not confident is true
- Take a negative tone
- Discuss politics



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Meeting Follow-Up

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What to Expect on the Hill

Meetings Over...Now What?

- Thank the Member or staff for their time.
- Invite member/staff to visit your PSO or foundation office and or community and to learn more about philanthropy's role in public policy.
- Snap a photo, if appropriate.
- Say thank you and share on social media! #FOTH2023.
- Send thank you note.



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Be Social at #FOTH2023

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Be Social at #FOTH2023

■ **Communications and Branding Kit**

- Email and Website Banners
- Logos
- Guidelines

■ **Social Media Toolkit**

- FOTH Hashtag #FOTH2023
- Graphic Cards for FB, Twitter, and LinkedIn
- Sample Posts Language
- Best Practices
 - Before FOTH
 - During FOTH
 - After FOTH



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Overview

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When?

- Programming: February 27, 2023
- Hill Meetings: February 28th – March 1st, 2023

Cost?

- \$230 (*All Attendees*)
- Increases to \$300 after deadline

How to register?

- <https://www.unitedphilforum.org/foundationsonthehill>



**FOUNDATIONS
ON THE HILL 2023**

UNITED PHILANTHROPY FORUM

Council on Foundations ♦ Independent Sector



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#FOTH2023 Agenda Outlook

- February 27, 2023 – March 1, 2023
- Programming
 - Full Agenda
 - “Inside the Beltway” Experts and Officials
 - Relevant Topics to Sector and Communities We Serve
- Several Receptions
 - 20th Anniversary Mixer
 - Capitol Hill Reception
 - VIP Reception
- Hill Meetings
 - Advocate with Colleagues for Sector Priorities
 - Come together as one voice for the sector and communities across the country



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#FOTH2023 Agenda Outlook

Full Panel Discussions

- Panel discussions and/or public policy related presentations scheduled for each day of #FOTH2023.
- In addition meetings with Hill staff, #FOTH2023 attendees will have the opportunity to engage in high-level discussions and ask questions, regarding key public policy issues.
- These panel discussions will range from DAFs to racial equity issues, and topics about collaboration with federal agencies.
- Each panel will give attendees the opportunity to uplift important ideas and share thoughts on potential solutions and ways forward.



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#FOTH2023 Agenda Outlook

- #FOTH2023 is **NOT** solely meetings with your legislators
- If you are promoting meeting with legislators and/or staff as the only function of FOTH, your members may be missing out.
- #FOTH2023 is a full public policy conference
- Open to the entire sector
 - Foundation Leaders and Staff
 - PSO Staff
 - Sector Advocates



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What's Next?

- FOTH 2023: Final Prep Webinar
(Register Online)
- Date: Thursday, February 23, 2023 - 1:00pm to 2:00pm EST
- Description:
 - All FOTH Team Leads should join this webinar to review final preparation and logistics. Forum staff will communicate last minute updates on legislation or other policy issues relevant to FOTH that PALs should be aware of.
 - Attendees will hear from Forum Staff about the use of technology at FOTH, including an in-depth look at the conference app.
 - This webinar will also provide a space to answer any final questions before the event.



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Answers

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**Thank you for you
participation and leadership!**

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