

You have decided to hold a Government Outreach Event, but aren't sure where to start. This may be a day of engagement at the State Capitol, or it may be at the local level, visiting City Hall and the different municipal departments. Or it may be a different type of meeting, possibly with staff from a Member of Congress at their District or State Office. There are several different types of government outreach events, which are detailed in the "Definition of a Government Outreach Event" document in the ASHRAE Advocacy Toolkit. The information below is primarily geared toward a State Outreach Day (aka "Day on the Hill" but the general principles can be applied to all types of events.

ASHRAE has put together the following summary of guidelines and tasks that you can use to help in the planning of your event. Click on the links below to see more about what you need to be planning and when. The first call you make should be to your RVC as a resource. Their primary responsibility is to support the chapters and their GAC efforts, so they are there to help. They will likely want to attend, so get them involved at the outset.

Your RVC will help coordinate your event with ASHRAE staff in an effort to allow either Society officers or staff members to attend. They will also provide you with literature and handouts from Society for your meetings, and they can schedule trainings and/or planning meetings in advance of the event. In addition, they can help connect you with other chapters from the same state that can participate with you. Your RVC can also connect you with other chapter chairs that have held outreach events to get ideas and learn from their experiences. You need to send an email to GovAffairs@ashrae.org to give them the scheduled day of the event and to request your resources. You can also find many resources at the ASHRAE Advocacy Toolkit by clicking [here](#).

[Early Stages of Planning \(2 to 4 months before the Event\)](#)

[Final stages of planning \(1 week to 2 months before the Event\)](#)

[The Big Day \(actual day of the event\)](#)

[Follow up Items and Future planning items \(right after the Event\)](#)

Early Stages of Planning (2 to 4 months before the event)

- Determine the calendar of the Legislative Session as observed on the legislative body's website; ASHRAE staff can help provide you with that information if requested.
- You would like to avoid the first few days of the legislative session. There tend to be several groups at the capitol advocating, and you want to have more of your legislator's focus.
- Also look into when the legislative committees that are related to our industry are having their meetings. These may be committees like Energy and Natural Resources, Appropriations and

Budget, Public Safety, Rules, Natural Resources and Regulatory Services, and Utilities. Each state has different committees in their government, familiarize yourself with them.

- The best way to ensure face time with the elected official is to strategically plan your meetings so that your chapter members are meeting with the elected official who represents them. When they know you are their constituent, they will pay more attention to your message. Keep in mind that face time can include video conferencing.
- Visit or call some of the elected official's legislative assistants (LA) to discuss the most favorable days to plan a visit. The legislative assistants are your best connection to the elected officials. Be sure to let the LA know what day you are coming and what issues you are wanting to discuss, even if you are only telling them about ASHRAE and our industry. Send them information ahead of time (you can find these materials on the ASHRAE Government Affairs website or request from ASHRAE staff) as they typically prepare the elected official for your visit.
- Set the day at least three to four months in advance.
- Notify the GAC Regional Vice Chair for your region.
- Notify the ASHRAE Washington Office. Send an email to GovAffairs@ashrae.org to let ASHRAE staff know the details. They will make every effort to have some representative from Society attend and will provide you with flyers and other handouts. They can also assist in arranging video conferencing if it is requested.
- If you have other ASHRAE chapters in your state, connect with the GAC chairs in those other chapters. This will help divide up the planning efforts and also provide a stronger representation of ASHRAE and the HVAC industry when you meet with legislators.
- Communicate the date to all of your chapter members and industry professionals to begin your planning and assembling your team. Publish this in your newsletter and chapter email blasts on a regular basis leading up to the event.

Final Stages of planning (1 week to 2 months before event):

- Reach out to your RVC or to ASHRAE staff at GovAffairs@ashrae.org to get the information that is currently tracked in Fiscal Note (this is the software ASHRAE uses to track current legislation as well as maintain contact information) by staff to identify any legislation that may be considered in the current legislative session. This will give you potential talking points beyond introducing them to ASHRAE.
- Most states have some type of bill tracking software on their main webpage. Become familiar with the tool and use it to track the bills that are related to our industry.
- Recruit members from the chapter who are interested in attending. Have them identify their state senator and representative or have them give you their home address to identify it for

them. Try and get as many districts represented to get the best coverage while you are at the Capitol.

- All the states' legislatures have tools on their website to identify your legislator, their office location, their legislative assistant, what committees they serve on, etc. Put all of this information into a single document to share with the team members who will be attending.
- Have the individuals attending contact their legislator or LA to schedule a time to meet. Make sure they identify themselves as their constituents as they are more likely to respond to their request when they know they live in their district.
- Now that you have your team and their legislators, prepare an agenda for the day.
- Obtain map of facility, and review in advance so that you are familiar with building layout.
- Order Advocacy information packets from Society. You can send an email to GovAffairs@ashrae.org. Society staff will handle the request, but you need to give them **3 to 4 weeks** to prepare the resources and get them sent out. You can find the Advocacy Toolkit [here](#) on the website as well. Staff will assemble portfolios with the Advocacy flyers, a fact sheet about ASHRAE, Public Policy Issue Briefs, and other information on how ASHRAE impacts our industry and how ASHRAE can be a resource for public officials. These folders hold business cards, so they are great to hand out in your meetings.
- Put together some talking points to share with your team members. These points can be relevant to specific pending legislation. If that is the case, be sure to identify the bill number to the legislative assistant for the legislator you're meeting with, so that they have time to pull the backup documentation to give to the legislator.
- If there is no specific legislation, have talking points about the HVAC industry and basic information about ASHRAE, including our current Public Policy Priorities.
- Coordinate with the GAC chairs in other chapters to have multiple legislative districts represented, if possible. It is best to put together a tentative schedule to share with all the chapter members participating giving the legislator, their office, the legislative assistant or office contact, and the time of the meeting. It is always good to group members together in groups of 2 or 3 for these meetings. It shows that ASHRAE is more than just an individual interest.
- Transmit agenda, maps, and discussion points (or video conference information if conducting virtually) a week or two prior to the event. If you are doing a video conference, ensure you have reached out to the legislator's assistant with the details and run through a test session to help work out any issues that may arise.
- Discuss dress code with all volunteers. Professional business attire is recommended.

The Big Day (actual Outreach Event):

- This is the fun part. This is what you have been working towards for weeks. Enjoy the day, convey your excitement to the other members attending. That will be infectious and you all will make a much stronger impression on your legislators.
- Send a note the day before the event to encourage all volunteers to be excited for the day and to enjoy the day and savor the moment. Remind everyone there to enjoy themselves. Remind them that they are the legislators' constituents, and legislators WANT to hear from them. They will give them time, there is no reason to be intimidated.
- Remember, it is best to have the group break up into smaller groups of 2 or 3 members and to try and pair up someone who has done this before with someone who is attending for the first time. Many times, the legislators' offices are smaller, so small groups work well.
- Meet as a group at the beginning of the event and get a picture of everyone attending to document the event and be able to send back to ASHRAE staff office. A screen shot of everyone involved in the video conference would also be a great opportunity to showcase our use of technology to get ASHRAE's message out.
- Outline the schedule of the day and review talking points. It usually works best to attend your meetings in the morning time frame, take a lunch break and share experiences, then finish out the afternoon with remaining meetings. Visit the chambers if they are in session between meetings.
- Remind members to be FLEXIBLE in their schedule. Check in with the legislative assistants to see if they have a specific time they want you to meet, or to just check in based on the legislator's schedule.
- Tell the Legislative Assistant who you are, tell them about ASHRAE and that you are there as a constituent. If you don't have a meeting time set, or the schedule has changed, many times they will make time in the legislator's schedule once they know why you are there and if you are a constituent.
- Address official by their appropriate title (e.g., "Senator Smith," "Congressman Roberts")
- **Inform each official we are not lobbyists.** You are meeting with your legislator to let them know about our industry and your passion for it and to share technical expertise.
- Acknowledge the purpose of your visit is to advise the official that ASHRAE is a resource for expert knowledge on various issues in the building environment including public health and indoor air quality, energy efficiency, code compliance, STEM education, and more. Share with them the size of the industry in your state, the types of jobs that are in the HVAC industry, so they get an idea of what kind of impact this has on their state.
- Be brief and concise, yet flexible for a more in-depth discussion with any official that asks.

- Be sure to give them the Advocacy portfolio WITH the ASHRAE business card and contact information. Many times, legislators will give you their card with their cell phone number. Use that in your follow up with them.
- **BE SURE TO GET PICTURES WITH YOUR MEMBERS AND THE LEGISLATORS.** If possible, get pictures with everybody posing as well as during the discussions. Send these to the RVC and to staff at GovAffairs@ashrae.org. This will be put in the bi-monthly Government Affairs updates. Some of these will also be posted to the website.
- Convene at the end of the day for a debriefing on lessons learned. This is also a good time to get some quick videos of participants asking them to share their experience about the day and any topics discussed or lessons learned.

Follow up and Future planning Items (the week after the event):

- Follow up with each of the chapter members who attended and make notes about their visits. Do a summary report and circulate to all the members. You will want to use these visits to build momentum leading to the next outreach event.
- Write formal personalized Thank You letters to every person visited, in person or virtually. Follow up with both the legislative assistant and the legislator.
- Follow up with Region GAC RVC on activity.
- Write an article for your newsletter with plenty of pictures. You are starting to recruit members for the next event.
- **Fill out the Government Outreach Day Reporting form. This is found on the ASHRAE Government Affairs website [here](#). Once submitted, it is received by staff. It is critical to fill this form out soon after your event so Society is aware of the event and you can begin planning for your next one.**
- Follow up with connections established.
- Network to make more connections.
- Form a group of ASHRAE Members interested in continuing the effort.
- Build enthusiasm and start preparing for next Outreach Event!

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