



A Toolkit for Building Congressional Champions for Safe Routes to School

How to Plan Site Visits and Member Meetings



Photos of federal policymakers at Safe Routes to School events (clockwise from top left): Rep. Tom Petri (R-WI), U.S. Transportation Secretary Ray LaHood, former Rep. James Oberstar (D-MN), and Rep. John Mica (R-FL)

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Introduction

The federal Safe Routes to School program, created in 2005 through the SAFETEA-LU transportation law, makes it safer for children to walk and bicycle to and from school. From 2005 to 2012, approximately \$1.1 billion has been allocated to state departments of transportation (DOTs) to support Safe Routes to School efforts. While the passage of the MAP-21 transportation law in July 2012 folds Safe Routes to School into a new Transportation Alternatives program, Safe Routes to School projects continue to be eligible, and many states are expected to maintain their current Safe Routes to School application processes so that funding continues to flow to these projects.

State DOTs award these federal funds to local governments and school systems for comprehensive efforts to improve safety and get more children walking and bicycling to school. Already more than 12,000 elementary and middle schools around the country are benefiting from the hundreds of millions of dollars made available through Safe Routes to School. These grants are allowing schools and communities to retrofit roads, sidewalks, and bike paths to allow children to more safely walk and bicycle to school. Funding also supports walking and bicycling safety education, driver awareness campaigns, more robust enforcement of speed limits and traffic safety rules, promotional events to encourage more children to walk and bicycle, and more. As more children are able to safely walk and bicycle to school, children and their communities are benefiting from reduced traffic congestion, better air quality, and healthier lifestyles. Safe Routes to School projects are making a difference for children in every state in this nation.

With passage of the new transportation law, MAP-21, it is up to all of us to demonstrate the importance of Safe Routes to School to policymakers at the local, regional, state and federal level. This will help ensure that Safe Routes to School projects are funded and that state departments of transportation continue to support Safe Routes to School projects. At the federal level, MAP-21 expires in September 2014, just two years after it goes into effect. That means Congress will revisit MAP-21 and potentially make changes to make programs more effective and to set spending levels by program—giving us an opportunity to once again dedicate spending to Safe Routes to School.

This is where we need your help. Elected officials are charged with representing the needs of their constituents. *Only you can show* elected officials the positive impact these federal dollars are having on children and families in your community. We hope you will use this toolkit to plan an event or meeting to help an elected official understand the value of Safe Routes to School. **While this toolkit is focused on Members of Congress, you can adapt the tools to fit an event with your mayor, an official from your Metropolitan Planning Organization, your Governor, a state legislator, or other elected officials.**

It's easier than you would think—you can simply invite an elected official to come to an event you are already planning for your Safe Routes to School program. Or, you can gather a group of local program proponents and request a meeting with your Member of Congress to talk about how your community needs additional funds for Safe Routes to School. You are already enthusiastic about Safe Routes to School—you just need to convey that enthusiasm and support to your elected official. All it takes is a little planning. And that's what this toolkit is for.

With your help, we can make sure that Safe Routes to School funds will be available to your community and others for years to come. And, you will know that you played a critical role in ensuring that children for generations to come will be able to safely walk and bicycle to school, thereby improving the communities we all live in.

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This toolkit explains everything you need to know about how to easily plan and schedule site visits or meetings with your Member of Congress. It can be adapted to fit other policymakers too. Each section walks you through different aspects of planning for the event or meeting. We have provided tools, which are templates or worksheets you can personalize, and resources with more information.

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1. DESIGNING THE EVENT OR MEETING

At this point, we hope you are interested in educating your Member of Congress about Safe Routes to School, which could make him or her a new champion for Safe Routes to School. This section will help you develop the concept and overview for your event or meeting.

Please read through the sections below for more information. In addition, there are two tools and resources that we hope you will take advantage of. Tools and resources are included in this toolkit and can also be downloaded in one word document at

<http://www.saferoutespartnership.org/sites/default/files/pdf/toolkittools2012.doc>.

- **TOOL: Planning Worksheet.** This document will help you put your ideas on paper and enable you to hone in on the type of event, the messaging, key partners and participants, and initial logistics. It will help to have this worksheet handy while you read through the sections below so you can start making notes about your prospective event or meeting.
- **RESOURCE:** Safe Routes to School National Partnership is here to help. Please go to <http://www.saferoutespartnership.org/national/engaging-congress-in-srts/designing-an-event> to let us know if you are considering hosting an event or scheduling a meeting with your Member of Congress. You can even request a phone consultation with Safe Routes to School National Partnership staff to help you plan your event and work through any questions or concerns you might have.

Deciding between an Event or Meeting

There are two primary ways you can use to familiarize your Member of Congress with your local Safe Routes to School program and its needs and benefits:

1. **An event.** You can invite the Member of Congress to participate in or witness an event you are already planning for your Safe Routes to School project, which can also help attract media attention. Examples of how you can engage your Member of Congress in an upcoming event include:
 - Participate in a walk or bicycle to school or home from school day. The Member can escort groups of children, hand out refreshments at the school, or make a speech after children arrive at school.
 - Accompany parents, local elected officials, school personnel, and engineers on a neighborhood assessment. The Member can then learn first-hand from the engineers and parents about the challenges facing children when they try to walk and bicycle to school.
 - View a classroom education or bicycle/pedestrian safety training event. See if the Member is interested in a speaking role to kick off the training session and emphasize the importance of safety.
 - Participate in a groundbreaking ceremony or unveiling for an infrastructure improvement. Ask if the Member would be interested in making a speech, helping with the ceremonial “first shovel of dirt” for a new project, or cutting a ribbon for a completed project.

2. **A meeting.** You can ask to schedule a meeting with the Member of Congress. Along with other Safe Routes to School leaders for your project, you can meet the Member of Congress to explain your project and discuss why Safe Routes to School is important to your community. This meeting will likely take place in your Member's district office, which should be nearby.

The best of these options is the event, so the Member can see first-hand the impact of Safe Routes to School funding and the involvement and excitement of a wide range of constituents. Plus, it's an efficient use of your time, since you would already be planning the event regardless of the Member's involvement or attendance. Including your Member of Congress will simply require a little extra work to invite the Member and staff him or her during the event. But, if you don't have any events coming up, a meeting is a good substitute.

Identifying your "Story" or Message

Regardless of whether you have chosen to invite your Member of Congress to an event or to request a meeting with him or her, it's important that you start thinking now about what you want to tell the Member of Congress about Safe Routes to School. Here are some ideas of the kinds of things you should think about in **developing your message** for the event or meeting:

- What barriers are preventing children from walking and bicycling to school that you are looking to address? (For example: lack of sidewalks and safe crossing areas, drivers that speed or run stoplights, parent concerns about a child's personal safety, lack of crossing guards, etc.)
- How much funding were you awarded for your Safe Routes to School project? What types of activities will your grant allow you to undertake?
- How will these activities improve your community? This can include many aspects (see the fact sheet on Safe Routes to School in Section 3, Developing Background Materials for more information):
 - Increased numbers of children walking and bicycling
 - Increased safety for children (from traffic and/or personal safety)
 - Less traffic congestion, less fuel consumption, and better air quality
 - Healthier lifestyles for children, which can help address obesity and related illnesses
 - A better sense of community for parents and children
- What stories or data do you have to show the impact of the Safe Routes to School project on your community for activities you've already started? This could include numbers of children and parents trained in bicycle and pedestrian safety, percentage increase in children walking or bicycling to school, reductions in unsafe driving incidents, as well as positive stories or quotes from parents, children, school personnel, and community leaders.

It's also important to think about what **your "ask"** will be for the Member of Congress. While it's important that your Member of Congress be familiar with Safe Routes to School and your local efforts, it's also important that he or she leave your event or meeting knowing exactly what needs to be done to help your Safe Routes to School project continue to flourish. Please see the "asks" document on page

21 of the toolkit for our recommendations on what you want to ask your policymaker to do. *Please note that if you are a nonprofit organization or if you receive federal or foundation dollars, you should refer to the Appendix for information about lobbying rules.*

Engaging your Partners

The nature of Safe Routes to School projects are such that many members of your community have a stake in the project and are actively involved in planning and carrying out project activities. You should consider who would be **good spokespersons** for your project, and make sure to engage them early on in your planning for the event or meeting.

It will be very meaningful for the Member of Congress to hear about the benefits of Safe Routes to School from a variety of community leaders and constituents. For example, a parent or child would be a great messenger when discussing the dangers of walking and bicycling to school that your Safe Routes to School project is seeking to overcome. A school nurse can be an effective advocate for the health benefits children incur when they are more active, or the negative impact of poor air quality on childhood asthma when there's too much traffic near a school. And, important leaders for your community—such as the mayor, a school principal or superintendent, and the chief of police—can also help impress upon the Member of Congress the importance and reach of your project within your community.

Some suggestions for the types of individuals you should consider engaging include:

- The school principal, teachers and school safety personnel
- Health experts, including the school nurse, pediatricians, or county/local health officials
- Law enforcement officials
- Engineers and safety experts
- Mayors and other local elected officials
- Representatives from area community organizations (nonprofits, youth organizations, bicycling and walking organizations, etc.)
- Parents and children

If you are requesting a meeting with your Member of Congress, consider bringing a small group of 4 to 6 individuals, representing a variety of viewpoints. If you are holding an event, consider how you can feature these various types of individuals during the event, either in speaking roles, or by ensuring that the Member of Congress is able to interact with different individuals during the event.

Thinking through the Logistics

Before you contact your Member of Congress to invite him or her to your event or to schedule your meeting, you need to consider some basic logistics.

First and foremost, it's extremely important to consider when your legislator is likely to be available. Members of Congress are frequently in Washington, DC to carry out legislative business. If you plan your event or request a meeting during their time in Washington, it's likely that the Member will either decline your invitation or send a staffer from their district office instead. To maximize the likelihood of

your Member's attendance, you should schedule your event or request a meeting during one of the following times:

- **During a district work period.** During these times, Members of Congress leave Washington, DC to spend time in their districts getting to know the needs of their constituents. These work periods are generally centered around holidays, like Presidents' Day, Memorial Day, and Independence Day, or during the month of August. The calendar for the U.S. House of Representatives is a good guide to know when these district work periods are: http://www.house.gov/house/House_Calendar.shtml
- **After Congress adjourns for the year.** After adjournments, Members of Congress are back in their districts until early January, when Congress reconvenes. Adjournment generally is scheduled for late September or early October, but often Congress ends up staying in session well into November or December if many important bills remain to be passed.
- **On Monday mornings or Friday afternoons.** While Congress is in session, its business is generally concentrated on Tuesdays through Thursdays to allow Members of Congress to go back to the district on the weekends. Depending on the Congressional schedule for the week, Members are often available for events on Monday mornings before they fly back to Washington, DC or on Friday afternoons after they return to the district.

Once you have identified some proposed dates and times for your meeting or event that are likely to coincide with when your Member of Congress is in your district, you should start thinking about some basic logistics. While you don't need to have every detail in place yet, it's important to have some basics arranged before you invite the Member of Congress (which is addressed in the next section). The type of information that would be helpful to include in an invitation or meeting request includes:

- Proposed date(s) and time(s). If you have any flexibility in when your meeting or event will take place, you'll increase the likelihood of the Member's acceptance if you have a couple of options.
- Length of the event or meeting (Members of Congress are busy, so you should not plan for more than an hour)
- Focus of the meeting or event
- The role the legislator will play (speaker, observer, etc.)
- Key attendees and their affiliations. Be sure to highlight in particular any community leaders that will be attending the event or meeting.

1. DESIGNING THE EVENT OR MEETING

TOOL: A PLANNING WORKSHEET

Tool: This worksheet will help you commit your ideas to paper and help you hone in on the type of event, the messaging, key partners and participants, and initial logistics. You can download a word version of all tools and resources at

<http://www.saferoutespartnership.org/sites/default/files/pdf/toolkittools2012.doc>.

Resource: In addition to completing this worksheet, please make sure you visit our website at <http://www.saferoutespartnership.org/national/engaging-congress-in-srts/designing-an-event> to let us know if you are considering hosting an event or scheduling a meeting with your Member of Congress. You can request a phone consultation with Safe Routes to School National Partnership staff to help you plan your event and work through any questions or concerns you might have after reading this toolkit.

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1. Brainstorm the different possibilities for events you might have coming up that you could invite your Member of Congress to. Write your ideas in the space below for the events, the dates you have in mind, and the role that your legislator might play. If there aren't any opportunities for events, write in that you will request a meeting.

2. What's the story or message you want to communicate to your Member of Congress about your Safe Routes to School project? List some ideas, including existing barriers to walking and bicycling, information about your Safe Routes to School funding, the benefits your project will bring to your community, and any data or stories you might have to illustrate these points.

- 3. Who are some key leaders in your community that you should involve in the event or meeting? Consider a wide range of individuals, including school personnel, health experts, law enforcement officials, engineers and safety experts, mayors and local elected officials, representatives from community organizations, and parents and children. Depending on where you envision your event taking place, there are others you should involve to get approval for holding the event (for example, the principal if the event will be at a school or city officials if the event will be on city streets). List some key names and organizations.

- 4. Write down basic information about your event or meeting. You will need this information to write the Member of Congress to request a meeting or invite him or her to your event.

Proposed date(s) and time(s)

Length of the event/meeting

Focus of the event/meeting

Role the legislator will play

Key attendees and their affiliations

2. INVITING YOUR MEMBER OF CONGRESS

Now that you have a basic idea of what your event or meeting will look like and focus on—and you have contacted key officials from the school and city to gain their permission and participation—it's time to invite your Member of Congress to attend. This section will help you understand the scheduling process and request your Member's participation. In addition to the information provided below, we have two tools that you can adapt. Tools and resources are included in this toolkit and can also be downloaded in one word document at

<http://www.saferoutespartnership.org/sites/default/files/pdf/toolkittools2012.doc>.

- **TOOL: Sample invitation or meeting request.** This sample letter will help you develop your invitation or meeting request. It will help to have a copy of your completed Planning Worksheet (from section 1).
- **TOOL: Sample script for following up with the scheduler.** Take this script and fill in information from your completed Planning Worksheet to develop your own personalized script to use when contacting the scheduler for your Member of Congress.

Obtaining Contact Information for your Member of Congress

Each individual and community is represented in the U.S. Congress by two Senators, who represent an entire state, and a Representative, who represents a “district” of approximately 700,000 people. We recommend focusing your efforts on your Representative as he or she is most familiar with your local community. Although in smaller states, you may have a greater chance of engaging your Senators than individuals in larger states. If your Safe Routes to School project affects multiple schools, there may be more than one Representative as well, so you should consider reaching out to each of them (although it will be challenging to get more than one Representative or Senator to one event.)

If you don't already know which Member of Congress you should be contacting, please visit: <http://www.congressmerge.com/onlinedb/index.htm>. There you can either click on your state in the map to get a list of all the Members of Congress for your state, or enter the mailing address of the school where your Safe Routes to School project is taking place to get a list of your two Senators and the Representative for your area. If multiple schools are affected by your Safe Routes to School project, enter each address to see whether you should consider engaging multiple Members of Congress.

Once you have identified your local Representative at the CongressMerge website, click on the individual's name to access more detailed information. For each Member of Congress, the website displays their Washington, DC address, phone and fax, and contact information for each of their district offices. Print this information out, as you will need it for the scheduling request.

Understanding the Scheduling Process

Members of Congress have extremely busy schedules that often book up well in advance. It is in your best interests to submit your event or meeting request at least a month in advance, six weeks in advance if possible. Keep in mind that Members get dozens of requests for appearances and meetings

all in one day, so it may take a little persistence on your part to ensure that your scheduling request is accepted.

The key to getting on the schedule of a Member of Congress is to work with his or her scheduler, who is charged with arranging all of the Member's meetings and events. Some Members even have two schedulers—one who handles events and meetings in Washington, DC and one who handles events back in the local district. The only way you will know who you should contact is by asking. Follow the steps outlined below to request your meeting or scheduler your event.

1. Call either the Washington, DC office or your local district office and let them know you are a constituent, and that you have a scheduling request for an event in your community and would like to know how to proceed. You will likely be asked to submit your request in writing, either via fax or email. Find out the name of the scheduler and his or her phone, fax and email so you can follow up. Some offices will prefer that all scheduling requests come to their Washington, DC office, while others will refer you to the appropriate district office for scheduling a local event. Once you have this contact information, you can proceed with drafting your scheduling request, submitting it, and following up on it.
2. At this point, you should draft your invitation or meeting request letter. Please refer to the Sample Invitation or Meeting Request tool for guidance on structuring this letter. Ideally, this letter should be from a prominent individual in your community, such as the mayor, the principal of the school, or the leader of a local business or nonprofit. At its most basic, your letter should communicate several key points:
 - Who you are and what organization you represent
 - Proposed date(s) and time(s). If you have any flexibility in when your meeting or event will take place, you'll increase the likelihood of the Member's acceptance if you have a couple of options.
 - Length of the event or meeting
 - Focus of the meeting or event
 - The role the legislator will play (speaker, observer, etc.)
 - Key attendees and their affiliations. Be sure to highlight in particular any community leaders that will be attending the event or meeting.
 - Your contact information so the scheduler can follow up.
3. Fax or email your letter to the scheduler you identified in whichever format the office indicated. It's important that you do use fax or email, as regular mail goes through a screening process that slows down delivery.
4. Wait a week. If you have not heard back from the scheduler, place a call to the scheduler to follow up on your request. Take a look at the Sample Script tool for more information on how to work with the scheduler.
5. If you are having trouble getting an answer on your scheduling request, see if any of your community leaders or partners have a relationship with the Member of Congress or someone on his or her staff. If so, provide them with a copy of your original letter and ask them to place a follow-up call as well to inquire about the status of your scheduling request.

6. Be persistent and check in regularly until you get an answer.
 - a. If the answer is that the Member of Congress cannot accommodate your request, the scheduler may offer you some alternatives. You will have to use your judgment and select the best option:
 - i. See if there's an alternative time or date for your meeting or event that the Member could attend.
 - ii. If you've requested that he or she attend an event, see if you and your key partners can meet with the Member instead at a different time.
 - iii. The last resort would be to have a staff person for the Member of Congress attend your event or take your meeting. If this is the only alternative you are offered, take it as it still gives you a chance to start educating your legislator about Safe Routes to School. Once you've had the initial meeting or event with the staffer, you can always make a future request for an event or meeting with the Member of Congress.
 - b. If the answer is yes:
 - i. Confirm key details with the scheduler about the time and date of the event, the legislator's role, and who you should be working with leading up to the event or meeting.
 - ii. If there will be the possibility of any media attending your event (see section 4 for more information on this), ask the scheduler if you should be working with their media staff person.
 - iii. Make sure the scheduler has your complete contact information, including a cell phone. A Member's schedule may change at the last minute, so it's important for the scheduler to be able to contact you on short notice.

2. INVITING YOUR MEMBER OF CONGRESS

TOOL: SAMPLE INVITATION OR MEETING REQUEST

You can use this sample letter to create a meeting request or invitation for your Member of Congress. Fill in any bracketed areas with information specific to your project. Try to keep the letter to one page, and put it on letterhead if possible. As noted, try to get a prominent community member (mayor, principal, local business leader, or local nonprofit leader) to sign the letter. Please fax or email your letter directly to the scheduler for the Member of Congress. Each office generally has a preference for how requests should be submitted. Tools and resources are included in this toolkit and can also be downloaded in one word document at <http://www.saferoutespartnership.org/sites/default/files/pdf/toolkittools2012.doc>.

[Date]

The Honorable [Member's First and Last Name]

[U.S. House of Representatives OR U.S. Senate]

ATTN: [Scheduler Name, obtained by calling the Congressional office]

[Mailing address (obtained through the CongressMerge website)]

[Fax Number or Email address (depending on how you are sending the request)]

Dear [Representative or Senator] [Member's Last Name]:

I write to you on behalf of a coalition of organizations and individuals in your district that are working to make it safer for children to walk and bicycle to [name of school]. We have received funding through the federal Safe Routes to School program to underwrite [very short description of your project.] *[If you have not received funding, insert instead: We are seeking funding through the federal Safe Routes to School program to underwrite [very short description of your project.]* As this project makes it possible for more children to safely walk and bicycle to school, our community will benefit from reduced traffic congestion, better air quality, and healthier lifestyles for our children.

[Insert the appropriate paragraph below, depending on whether you are requesting a meeting or inviting the Member of Congress to an event.]

TEXT FOR AN INVITATION TO AN EVENT:

We would appreciate the opportunity to show you more about this exciting project, and the federal Safe Routes to School funding that makes our work possible. We will be holding an event on [proposed date and time] at [location]. The event will [brief description of type of event]. The event will last approximately [length of time] and we would be honored if you would agree to [speak/observe/participate – whatever role you want the legislator to play]. As this is a community event, you will have the opportunity to interact with a number of community leaders, including [list names and organizations of some key participants and attendees]. Parents and children from the school will also be participating. *[Insert if you have the capacity: Assuming you are able to join us, we would also be pleased to work with your press secretary to invite local media to cover the event.]*

TEXT FOR REQUESTING A MEETING:

We would like to request a meeting with you to tell you more about this exciting project, and the federal Safe Routes to School funding that makes our work possible. We propose [insert a few dates and times], but are open to other dates and times if those don't work with your schedule. Accompanying me to the meeting will be some other key community leaders that are actively engaged in our project, including [list names and organizations of some key meeting attendees].

I greatly appreciate your consideration of this request. You or your staff can reach me at [insert phone number and email address] to follow up.

Sincerely,

[Your Name]
[Your Organization]

cc: [list individuals and organizations who are mentioned in the letter as attending/participating in your event or meeting. *Make sure to send these individuals a copy of the letter via email.*]

2. INVITING YOUR MEMBER OF CONGRESS

TOOL: SAMPLE SCRIPT FOR FOLLOWING UP WITH THE SCHEDULER

Approximately a week after you have submitted your scheduling request by fax or email, you should call the scheduler to follow up if you have not heard anything back yet. Your goal is to get a yes or no answer on your scheduling request. It may take a few calls to reach the scheduler, so be persistent. The script below will help you work with the scheduler. Tools and resources are included in this toolkit and can also be downloaded in one word document at <http://www.saferoutespartnership.org/sites/default/files/pdf/toolkittools2012.doc>.

1. **Call the Congressional office** – either the Washington, DC office or the district office where the scheduler is located—and speak with whoever answers the phone:

Hello, this is [your name and organization] calling. I'd like to speak with [scheduler name] to follow up on a scheduling request I submitted last week, please.

2. **If the scheduler is not available, leave a message:**

Hello, this is [your name and organization] calling. I submitted a scheduling request last week related to Safe Routes to School and was calling to follow up to see if Representative/Senator [last name] is available. If you could give me a call back at [phone number] soon, I'd greatly appreciate it. Thank you.

3. **Once you are able to speak with the scheduler:**

Hello, this is [your name and organization] calling. I submitted a scheduling request last week [for an event on [date] / for a meeting to discuss our Safe Routes to School project] and am calling to follow up. I was wondering if you had any information on whether Representative/Senator [last name] would be able to [attend / meet with us].

- a. If the scheduler says they haven't made a decision on the scheduling request yet:

I understand that you are probably trying to balance a lot of requests, but we certainly hope this will be one that Representative/Senator [last name] will be able to accommodate. The event will also include people such as [name of prominent individuals, such as the mayor, principal, local business or nonprofit leader]. When would be a good time for me to call back to get an answer on this scheduling request?

- b. If the scheduler says the Member of Congress won't be able to meet/attend the event:

We're very sorry to hear that Representative/Senator [last name] isn't available.

- Is there an alternate time or date that we might be able to make work?
- *OR, if you can't reschedule your event:* Is there someone on the Representative's/Senator's staff that might be able to fill in?

- c. If the scheduler says yes to the meeting request/event:

That is wonderful news, we so appreciate Representative/Senator [last name]'s willingness to attend/meet with us. And, thank you so much for your help in arranging this.

- I'd like to confirm the key details (date and time, length of meeting/event, legislator's role (if an event), attendees).
- How far in advance of the event/meeting should we check in again with you just to make sure we're still on the schedule? And, is it you we should be working with on any final logistical details?
- I'd also like to make sure you have all my contact information, including my cell phone, in case anything comes up at the last minute. [provide your cell phone]
- [If you have the capacity] We are considering inviting the media to our event. Is there a press secretary on your staff that we should be coordinating with?

3. DEVELOPING BACKGROUND MATERIALS

Whether you are holding an event or attending a meeting with your Member of Congress, you will need some background materials. These materials will help the Member of Congress, event participants, and the media understand more about your project and Safe Routes to School.

This section will walk you through how to create a one-pager about your project, how to download fact sheets on the national Safe Routes to School movement, and what to put into informational packets. Tools and resources are included in this toolkit and can also be downloaded in one word document at <http://www.saferoutespartnership.org/sites/default/files/pdf/toolkittools2012.doc>. Tools and resource for this section include:

- **TOOL: Template for one-pager on your local Safe Routes to School project.** This template will help guide you in creating an informative and interesting overview of your project.
- **RESOURCE: The “asks” for policymakers on Safe Routes to School.** This document can help you determine the best “ask” for the policymaker you are engaging.

Creating a One-Pager on your Local Safe Routes to School Project

It’s important that you be able to sum up your local Safe Routes to School project in a one-page overview document. This one-pager should clearly communicate what you are seeking to accomplish with your Safe Routes to School grant, and how it will benefit your community.

If you don’t yet have funding to pursue the project, this one-pager can sum up what you hope to do, if funded, and how the project would benefit your community.

Please consider the following bullets and fill out the “Template for one-pager on your local Safe Routes to School project” to create your local one-pager. The template comes at the end of this section, or can be downloaded in word format at <http://www.saferoutespartnership.org/sites/default/files/pdf/toolkittools2012.doc>.

- What problems and challenges are you looking to solve with your Safe Routes to School grant (or future project, if funded)? Examples include:
 - Lack of sidewalks, bikeways, and safe crossing areas
 - Drivers that speed or run stoplights
 - Parent concerns about a child’s personal safety
 - Traffic congestion and poor air quality around the school
- How much funding were you awarded for your Safe Routes to School project, or what types of funding do you need? What types of activities will your grant (or grant you hope to secure) allow you to undertake? Types of activities can include:
 - Engineering – for example, extending sidewalks, improving street crossings, or adding bicycle paths or lanes
 - Education – for example, walking and bicycling safety education and training at the school

- Enforcement – for example, better enforcement of speed limits and stoplights
- Encouragement – for example, holding a promotional “walk and bicycle to school” day and contests
- How will these activities improve your community? Common benefits of Safe Routes to School include:
 - Increased numbers of children walking and bicycling
 - Increased safety for children (from traffic and/or personal safety)
 - Less traffic congestion, less fuel consumption, and better air quality
 - Healthier lifestyles for children, which can help address obesity and related illnesses
 - A better sense of community for parents and children
- If your project has already started, what stories or data do you have to show the impact of the Safe Routes to School project on your community for activities you’ve already started? Examples can include:
 - Number of children and parents trained in bicycle and pedestrian safety
 - Number of children participating in a walk and bicycle to school day
 - Reductions in unsafe driving incidents
 - Positive stories or quotes from parents, children, school personnel, and community leaders
- Are there any other outstanding needs for Safe Routes to School that you will need additional funding for in the future to make your school safe and completely accessible for student pedestrians and cyclists?

Downloading Background Materials from Safe Routes to School National Partnership

In addition to information about your local project, Members of Congress and the media will be interested in knowing how your project fits into a national movement. Safe Routes to School National Partnership has developed several documents that you can download, print out, and use as-is in your informational packets. They include:

- **“Safe Routes to School: Helping Communities Save Lives and Dollars”** This four-page fact sheet gives an overview of the federal Safe Routes to School program and provides statistics to reinforce its importance and impact. It can be downloaded at <http://www.saferoutespartnership.org/sites/default/files/pdf/SRTS-policy-report-fact-sheet.pdf>.
- **Safe Routes to School in My State.** The Safe Routes to School National Partnership has state-by-state fact sheets about the funds available in each state, and how funds have been awarded. To get a copy of your state’s report, please contact Margo Pedroso with Safe Routes to School National Partnership at margo@saferoutespartnership.org for a copy.

Producing Informational Packets

Informational packets are good “takeaways” for meeting and event participants, and will help convey your message about the importance of Safe Routes to School to your local community. While most packets will contain similar basic information, there may be items you include only for certain audiences. If possible, purchase recycled-paper folders and affix a sticker on the front with your organization’s logo and a reference to Safe Routes to School, and put the materials inside the folder. You want your informational packets to be memorable and informative, but not to include so much information that they are overwhelming.

Here are our recommendations of what to include in your informational packets:

For Members of Congress

Make sure to create several copies of this packet, so you can share one with the Member of Congress plus any staff members that accompany him or her.

- One-pager on your local Safe Routes to School project
- “Safe Routes to School: Helping Communities Save Lives and Dollars” fact sheet
- Safe Routes to School in My State fact sheet
- Business card for the individual who should be contacted for more information about your local project
- Promotional give-aways or brochures you are using in your Safe Routes to School project (t-shirts, reflective stickers, etc.). Please note that any of these giveaways must be less than \$10 in value due to Congressional rules banning expensive gifts.
- Any local media attention your project has generated

For the Media

Create a number of these packets so you will have enough for reporters and any other news media staff. Members of the media will likely use this information when writing or producing their story. For more information on working with the media, see Section 4.

- One-pager on your local Safe Routes to School project
- “Safe Routes to School: Helping Communities Save Lives and Dollars” fact sheet
- Safe Routes to School in My State fact sheet
- Press release on your event (see section 4 for a sample press release)
- Business card for the individual who should be contacted for more information about your local project
- Promotional give-aways or brochures you are using in your Safe Routes to School project (t-shirts, reflective stickers, etc.).

For the general public

Depending on the size of your event, you may opt to simply produce copies of the one-pager on your local Safe Routes to School project rather than creating dozens of folders.

- One-pager on your local Safe Routes to School project
- “Safe Routes to School: Helping Communities Save Lives and Dollars” fact sheet
- Safe Routes to School in My State fact sheet
- Business card for the individual who should be contacted for more information about the local project

3. DEVELOPING BACKGROUND MATERIALS

TOOL: TEMPLATE FOR ONE-PAGER ON YOUR LOCAL SAFE ROUTES TO SCHOOL PROJECT

You can use this template to develop a one-pager that clearly communicates the goals and impact of your local Safe Routes to School project. This one-pager can be used with Members of Congress, the media, and other interested individuals. Fill in any bracketed areas with information specific to your project. Try to keep the document to one page, and put it on your organization's letterhead if possible. Tools and resources are included in this toolkit and can also be downloaded in one word document at <http://www.saferoutespartnership.org/sites/default/files/pdf/toolkittools2012.doc>.

[LOGO or LETTERHEAD]

Helping Schoolchildren Be Safe, Healthy and Active: [school or community name] Builds Safe Routes to School

With the receipt of [dollar amount of grant] from [name of your state agency that awards Safe Routes to School money], [school or community name] is proud to be joining more than 12,000 schools throughout the nation in Safe Routes to School activities. *[If you have not yet received a grant, substitute: [school or community name] seeks to join more than 12,000 schools throughout the nation in building safer routes to school.]*

Grants from the federal Safe Routes to School (Safe Routes to School) program allow schools and communities to retrofit roads, and build sidewalks and bike paths to allow children to more safely walk and bicycle to school. Funding also supports education, promotion and enforcement campaigns. As more children are able to safely walk and bicycle to school, children and their communities are benefiting from reduced traffic congestion, better air quality, and healthier lifestyles.

The Need for Safe Routes to School

Concerned by some of the challenges that children in our community face when walking and bicycling to school, [name of the organization awarded the grant] applied *[or will be applying]* for funding from [name of state DOT] through the federal Safe Routes to School program to address these issues.

- [Insert a few bullets explaining challenges that children have faced when walking or bicycling to school, and what activities you will be undertaking to address those challenges. For example: Children and parents expressed fears about drivers traveling too fast and ignoring stop signs, creating a dangerous situation for children crossing the streets near the school. The Safe Routes to School grant will allow us to undertake a driver education campaign, train additional crossing guards, and improve enforcement of traffic rules around the school.]

A Wealth of Benefits

The [school name] Safe Routes to School project will produce a number of important benefits for the children attending [school name] and residents of [community name], including:

- [Insert a few bullets outlining your end goals for the project. If you have already made progress on any of these goals, include current statistics or findings. Try to include a mix of goals that

cover the numbers of children walking and bicycling as well as larger outcomes for the community. For example: Our goal is to double the number of children walking and bicycling to and from school each day to 100, which would represent 25% of school enrollment. Three months into the project, we are already seeing important gains. A recent bicycle training session educated 20 children and their parents; half of them have started bicycling to school at least one day a week since the training. Each child that changes to walking or bicycling will, on average, get an additional half-hour of exercise each day, greatly contributing to improved health and lower rates of obesity for our schoolchildren.]

A Community Working Together

A coalition of community organizations and leaders are making [*or will make*] this important project possible, including:

[list key partners]

For more information on this project, please contact [insert name and contact information for a spokesperson for the project or organization receiving the grant.]

3. DEVELOPING BACKGROUND MATERIALS

RESOURCE: THE “ASKS” FOR POLICYMAKERS ON SAFE ROUTES TO SCHOOL

While this toolkit is focused on Members of Congress, it can be adapted to fit an event with a wide range of local elected officials, including your mayor, a representative from your Metropolitan Planning Organization, your Governor, a state legislator, or other elected officials.

No matter what type of elected official you are engaging, you want them to see first-hand the great work that you are doing through Safe Routes to School. However, you also want to ensure that you ask the policymaker to do something to help Safe Routes to School.

The worksheet below provides our suggestions for the types of “asks” of elected official, divided up by type of official. Use this worksheet to identify the right ask for the policymaker attending your event. Then, you can work that ask into the talking points and other materials for your event or meeting that are discussed in later chapters.

This resource can be downloaded in a word document at <http://www.saferoutespartnership.org/sites/default/files/pdf/toolkittools2012.doc>.

All of these asks are centered around the changes in funding for Safe Routes to School that are being implemented through the transportation bill, MAP-21, that was signed into law in July 2012. As part of that law, the federal Safe Routes to School program was folded into a new Transportation Alternatives program. Safe Routes to School projects may now have to compete against other bicycling and walking projects, environmental projects, and more – depending on how the state implements the program. And, states have less funding available for Transportation Alternatives unless they transfer funds in from other transportation programs. Additional information on MAP-21 and the changes impacting Safe Routes to School are available in our MAP-21 Resource Center at <http://www.saferoutespartnership.org/national#map21resourcecenter>

Review the asks below, and select the most appropriate one for the type of policymaker you have invited.

The Asks Depend on the Policymaker

Local Policymakers: e.g. Mayor, county executive, city councilor

- *The Ask:* Funding for the Safe Routes to School program flows through the state DOT’s Transportation Alternatives program. We would like your support to apply for funding to support our remaining Safe Routes to School infrastructure projects and to support our non-infrastructure efforts. Would you be able to write a support letter next time there is an open grant cycle?

Regional Policymakers: e.g. Metropolitan Planning Organization director

- *The Ask:* With the new transportation bill, MAP-21, large metropolitan planning organizations will receive funding from Transportation Alternatives to support bicycling, walking and Safe Routes to School projects. We would like to work with you to ensure that your organization

understands Safe Routes to School and provides an opportunity for our school to apply for funding. Will the MPO be including Safe Routes to School as an eligibility for Transportation Alternatives funding? When will you be making funds available, and how can we apply?

State Policymakers: State DOT official, Governor or state legislator

- *The Ask:* The new transportation bill, MAP-21, folds the Safe Routes to School program into the new Transportation Alternatives program. Funding has been decreased for Transportation Alternatives, meaning we need our state department of transportation to use every available dollar. Will you ensure that our state uses all of its available Transportation Alternatives funds, implements the program promptly, and spends down any remaining Safe Routes to School and Transportation Enhancements funds?
- *Note:* for additional information on these state-specific asks, please see our explanation of our state campaigns: <http://www.saferoutespartnership.org/about/gearing-whats-next-federal-transportation-bill>. Also, you can see how much funding your state has left in its Safe Routes to School program here: <http://www.saferoutespartnership.org/state/stateofstates>.

Federal Policymakers: e.g. U.S. Senator, U.S. Representative

- *The Ask:* In July 2012, Congress passed the transportation law MAP-21. As part of that law, they folded the Safe Routes to School program into a new program called Transportation Alternatives and cut funding by approximately 30%. When Congress considers the next transportation bill in 2014, I ask you to work to increase funding for Safe Routes to School and sustain the federal commitment to these critical safety projects.

Please note that if you are a nonprofit organization or if you receive federal or foundation dollars, you should refer to the Appendix for information about lobbying rules when you are making a legislative ask, like the one of the federal policymaker.

4. CARRYING OUT A SUCCESSFUL EVENT

If you have opted to hold an event and you have secured the attendance of your Member of Congress, you now must focus on planning and carrying out the event. You should also seriously consider inviting the media to cover your event and help get the word out about your project, but make sure to clear this with the Member's staff first. In this section, you will learn more about event logistics that pertain in particular to successfully hosting your Member of Congress and engaging the media. Tools and resources are included in this toolkit and can also be downloaded in one word document at <http://www.saferoutespartnership.org/sites/default/files/pdf/toolkittools2012.doc>. Tools and resource for this section include:

- **TOOL: Event checklist.** This checklist will help you quickly determine whether you have handled the key tasks for your event.
- **TOOL: Press release template.** Personalize this press release template with information about your event and project.
- **RESOURCE: Tips for giving interviews.** You can print out this summary to help prepare for any media interviews.

Planning the Event

While this guide is not meant to be a how-to for planning an event, these resources should enable you to recognize if you have planned the "basics" so the event will run smoothly and successfully:

- Create an event timeline for the weeks you have remaining until the event and indicate what tasks need to be completed by which days.
- Develop an event timeline for the day-of that lays out the event start and end time; the various components, segments, or speeches involved in the event, including the length and order of each; and the roles and focuses for each individual who will be speaking or leading segments.
- Obtain permission for the location of your event. If it's on school grounds, make sure the principal has signed off on the event. If it's on city streets, make sure you have checked with city authorities to obtain permission or any required permits.
- Arrange for important logistical details, including refreshments, decorations, a backdrop and podium (plus microphone if it is a large event) for any speakers, and how your room or space will be laid out for the event.
- Confirm the attendance for the individuals that will be speaking or leading event segments, and make sure they know their role.
- Invite other key community leaders, including a representative for your school, funding agency and other key county, city, or local officials that are important to your project.
- Produce the informational packets discussed in Section 3.
- Identify someone who can volunteer to take photos (if possible, someone who can also videotape) during your event. It is important to document your event and get photos of the Member of Congress and other community leaders interacting with project personnel, parents

and children, and other VIPs. You can use the photos in any publicity materials or brochures you develop in the future, and you can send copies to the Member of Congress or the media.

- Notify the press about the event (see the “Engaging the Media” section below for details).

In addition to planning the event, there are a few details you need to consider when planning for the involvement of your Member of Congress. Things to plan for include:

1. Identify a senior leader for your project or organization who will serve as the liaison with the Member of Congress and his or her staff during the event. This individual should not have any other responsibilities during the event except for escorting the Member during the event and taking care of his or her needs. The liaison will greet the Member of Congress when he or she arrives at the event and ensure that the Member gets a good understanding of Safe Routes to School during the event. Additional detail on this individual’s role is discussed in the “Holding the Event” section below.
2. Make sure the Member liaison you have selected has reviewed and understands all the background materials you have developed for your event (as discussed in Section 3), including your project one-pager, the fact sheets on Safe Routes to School nationally and in your state, and the press release (if any). The liaison should be able to quickly and knowledgeably talk about your project and its importance to the community. Also, make sure the liaison understands what the “ask” is for the policymaker (as determined in section 3).
3. Think about who your Member of Congress should talk with while they are at your event. Make sure these individuals are all prepared with background information on your project so they can represent Safe Routes to School well when talking to the Member and provide their unique perspectives. Provide a list of these individuals to the person who will be serving as the Member liaison.
4. A week before your event, contact the scheduler for the Member of Congress.
 - Confirm that the Member still intends to participate in your event, as well as the date, time, location, and role for the Member of Congress.
 - Confirm how long the Member can stay.
 - Let the scheduler know that your Member liaison (provide the name and cell phone if possible) will be greeting the Member when he or she arrives at the event.
 - Ask if there is a cell phone or number you should call the day of the event if the Member does not arrive as planned
 - Make sure the scheduler has a cell phone or other way of contacting you the day of the event.
 - Thank the scheduler for all her assistance in securing the Member’s participation.
 - If you are planning to engage the media (see the next section for details), let the scheduler know that you are working with their press secretary.
5. Contact the scheduler one last time the day before your event to confirm the Member’s attendance.

Engaging the Media

Many people are intimidated by the idea of calling or writing a reporter or editor to pitch a story. They believe that the media will be uninterested in stories coming from the community. In reality, reporters and editors rely on a wide variety of sources for news, and they are often grateful to those who tip them

off to good stories. And, if you are able to secure some media coverage for your event, it will help spread your message about your Safe Routes to School project—possibly encouraging more parents to consider allowing their children to walk or bicycle to school or reminding drivers to be more careful near schools.

Before you start to contact the media, you need to be prepared. Investigate the following items:

1. Talk with the scheduler for the Member of Congress to see if they are comfortable with having media at the event, and whether they would like to be involved in publicizing the event. The press secretary may have different ways in which they want to be involved, such as:
 - Providing you with some contacts for reporters or helping pitch the story
 - Asking to review your press release or collaborate on language
 - Providing a quote from the Member for your release
 - Producing their own press release about the event.
2. Check with your key partners to see if they have a press or media person on their staff. If so, see if you can work together. This is particularly important when working with schools and city officials. They may have existing relationships with reporters that will make it easier to get them to cover the story.
3. What are the key types of media you should contact? Make a list of each of the following, and use the phone book or the Internet to find their phone numbers. If you've noticed a particular reporter tends to cover stories in your neighborhood or about transportation or education issues, make a note so you can start with that person when you call.
 - Newspapers, including the main newspaper for your area as well as smaller community papers or newsletters
 - Radio stations, including any local public radio or news stations
 - Television stations, including the major networks plus any local public television or cable access news channels
4. Think about your talking points. You need to be able to quickly and succinctly pitch the reporter on why your event would make for an interesting story. The key things you need to cover are:
 - When your event is and what kind of event it is
 - Why your event and project are important to the community (take a look at the one-pager you developed in section 3 and pick the most important things about how your project will help children in your community)
 - Why this is "news"—any high-profile local leaders who will be in attendance (including the Member of Congress!), that it's the kick-off for a campaign or building project, etc.
5. Draft a press release. A press release is simply an informative document to communicate basic information about your organization, your project, your event, and why it's news. It is a longer version of the talking points you just developed. Please see the Sample Press Release tool in this section, which you can personalize and adapt. You will fax or email this to any reporters or editors who ask for more information.

6. When you are a week before your event, you should start making media “pitches.” If you don’t know which reporter to talk to, call the main number and ask to speak to the editor or reporter who covers education, transportation, or children’s issues. Make sure to have your talking points in front of you before making the call!

Once you reach the reporter or editor, it’s important to remember that they are often working on “deadline,” and that you need to be sensitive about timing before making your pitch. A possible approach would be to say:

“Hello, my name is _____ and I’m calling to let you know about an upcoming event at [school name] involving Rep. [name]. Do you have a few minutes to talk right now?” If the reporter says, “No, I’m working on deadline,” then ask when might be a good time to call back. If the reporter agrees to talk, go into your quick “pitch” of your talking points.

Here’s an example for a pitch:

“XYZ School is holding its first-ever “Walking Wednesday” on October 3, 2012 as part of International Walk to School Day and Rep. [name] will be attending/speaking. We recently received a \$100,000 federal Safe Routes to School grant to enable more children to safely walk and bicycle to and from school—which will help reduce traffic congestion, improve safety and air quality, and introduce more children to healthy and active lifestyles. We have made important safety upgrades to the sidewalks around the school, and our kick-off event is an important opportunity for parents and their children to try walking to and from school.”

Pause and see if the reporter says anything. If not, continue. “A number of community leaders will be speaking at the inaugural Walking Wednesday, including Mayor Jones and Congressman Smith, and local businesses will be handing out healthy snacks and incentives. We expect it to be a fun and informative day for families and community members in Johnstown. Do you think you might be able to cover this event? How can I send you our press release?”

The reporter probably won’t commit to covering the story on your phone call, but hopefully you have piqued their interest. Send them your press release and the one-pager on your project you developed in Section 3 via fax or email, whatever the reporter preferred. Make sure to follow up right away, before the reporter loses interest. If the reporter says that he or she is not interested, ask if there is someone else at the paper who you can contact. Be sure to thank the reporter or editor for their time, regardless of whether they do or don’t want to do a story.

If the reporter or editor agrees to consider doing a story, call back the day before your event to remind them about your event and confirm whether or not they will be in attendance. Make sure they have your contact information (including a cell phone if possible) in case they have last-minute questions when writing or producing their story. It’s also a good idea to send an updated press release one day in advance of the event to ensure that the media has the necessary information.

As you talk with reporters, build a “media contact” list for yourself, including names, numbers, email, the publication name, and how they like to receive press releases (by fax or email). Then you will have this information handy for future events.

Holding the Event

The day of the event you will likely be busy making sure all your planning comes together. There are some things that you should ensure will be handled for the Member of Congress and the media (if they will be attending.)

The individual you have identified as the “Member liaison” is very important during your event. Their job is to make sure the Member of Congress has a good time at the event, is seen in a good light by the community, and walks away with a favorable impression of your organization and Safe Routes to School. Specific duties for the Member liaison during the event include:

- Greet the Member of Congress when he or she arrives, and thank him or her for attending.
- Confirm with the Member the timeline for the event, and that the Member is still able to stay as long as the scheduler had indicated.
- Tell the member a few highlights about the project and give some context for the event.
- Make sure the Member is comfortable and see if he or she needs refreshments, a place to take a phone call, or any information for remarks they might be making at the event.
- Let the Member know that there are some key individuals you would like to introduce him or her to, and facilitate those interactions.
- Coordinate with the photographer to document the Member’s interactions during the event.
- If the Member will be making a speech or leading a segment of the program, make sure he or she is in the right place at the right time.
- As the event is winding down, thank the Member for attending and “make the ask” that you decided upon in section 3. *Please note that if you are a nonprofit organization or if you receive federal or foundation dollars, you should refer to the Appendix for information about lobbying rules.*
- Give the Member and his or her staff the informational packets you have prepared, as well as your business card.
- Get a business card from any staff accompanying the Member of Congress so you can follow up after the event.

You may not know until you are at the event if any members of the media will cover your event. So, if you sent out a press release, you should plan for a few things the day of the event:

- Identify a spokesperson for your project who will do interviews with reporters. See the Tips for Giving Interviews tool in this section for additional information. Please also note that the reporter will probably have their own “angle” in mind for the story and may ask the spokesperson if they can speak with certain types of individuals, like a parent, student, or engineer.
- Create some packets for the media (see section 3 for more information on what to put in a media packet) that you will distribute at the event.

- Have a place at your event where media can check in. One way of doing this is to have a table with a sign on it for Press. Members of the media should be asked to sign in and provide their contact information, and you can then give them a media packet.
- Identify someone to staff the media table. This person should greet the media, thank them for coming, and help steer them to your spokesperson and any other newsworthy individuals (like the mayor, the principal, the Member of Congress, etc.) Your Member of Congress will likely be very happy to talk to be featured in a “feel-good” story about child safety and education, so try to make sure any reporters get an opportunity to talk to the Member.

If the reporter covers your event, be sure to send a thank you note afterwards. Through building the relationship, you will hopefully become a credible “source” for the reporter, and you might be able to work with him or her again on future events. Remember, the media is always fast-paced, so if you ever get a call from a reporter asking for information, make it your top priority to respond as soon as possible. If you are timely and provide accurate information, you can become a “go-to” source for the media.

Another way to continue the good “free” press about your project is to follow up on a news story with a letter to the editor. A leader for the project can write a letter to the editor of the publication that covered the story thanking the paper for covering the story, thanking the Member of Congress for attending, and reiterating the importance of the Safe Routes to School project. You can also ask a parent or older student to write a letter to the editor about the impact of the project on their lives. Be sure to follow the guidelines in your local paper’s opinion section for the length and format of your submission.

4. CARRYING OUT A SUCCESSFUL EVENT

TOOL: EVENT CHECKLIST

This event checklist can help you determine whether you have key tasks handled for your event. This is not meant to be a complete guide to planning an event, but focuses more on items that specifically pertain to hosting your Member of Congress and/or the media. You can download a word version of this tool at <http://www.saferoutespartnership.org/sites/default/files/pdf/toolkittools2012.doc>.

EVENT LOGISTICS

- Event timelines developed (day-of event timeline and one for the weeks leading up to the event)
- Permission/involvement obtained for site of event (from principal, city officials, etc.)
- Invitations sent (including funding agency and county/local officials) and attendance confirmed
- All logistics in place (such as a podium for speakers, refreshments, decorations)
- All participants know their roles and their talking points
- Informational packets, including one-pager on your project, prepared for Member and media
- Photographer and/or videographer lined up

MEMBER OF CONGRESS LOGISTICS

- Scheduler contacted the week before and the day before to confirm the Member's attendance
- Scheduler has contact information (including cell phone) for someone at the event
- List of key individuals for the Member to meet is created; each individual prepared with talking points and background information
- Member liaison identified, and prepared to:
 - Greet Member and make him or her comfortable and brief him/her on the project
 - Steer the Member to the individuals you've identified to help talk about your project
 - Coordinate with the photographer to take photos of the Member at the event
 - Provide an information packet and get contact information for the Member's staff
 - Ask for the Member's support of Safe Routes to School

MEDIA LOGISTICS (only if media will be attending)

- Media called the day before the event as a reminder, and press release faxed/emailed again
- Spokesperson identified, and prepared with talking points
- Media sign-in table or check-in area available
- Staff person assigned to greet media and steer them to the spokesperson and other leaders

4. CARRYING OUT A SUCCESSFUL EVENT

TOOL: PRESS RELEASE TEMPLATE

You can use this template to develop a press release announcing your event and communicating the goals and impact of your local Safe Routes to School project. You can fax or email this press release to any reporters or editors that are considering covering your event. Fill in any bracketed areas with information specific to your project. Try to keep the press release to one page, and put it on your organization's letterhead or work with the school or city to put it on their letterhead. You can download a word version of this tool at

<http://www.saferoutespartnership.org/sites/default/files/pdf/toolkittools2012.doc>.

FOR IMMEDIATE RELEASE

[Date of Press Release]

FOR MORE INFORMATION:

[Contact person name, title]

[cell or phone, and email]

[LOGO or LETTERHEAD]

[School or community] to Hold Event on [Date] To Help Schoolchildren Be Safe, Healthy and Active With Rep. [Name] Attending

[City, State]—[School or community name] will be hosting an event on [date and time] at [location] to enable more children to safely walk and bicycle to and from school as part of its Safe Routes to School program. Representative [name] will be at the event to [speak/chaperone children/etc.].

[Insert a description of the event, the purpose, and an estimate of how many participants will be involved. Include a list of speakers and their affiliations, and mention any local leaders who will be in attendance (focus particularly on local leaders like the Member of Congress, the mayor, the principal, prominent business leaders, etc.).]

[In a second and third paragraphs, you should highlight the “big picture” this event is part of – your overall plan for your Safe Routes to School project, the benefits for your community, key members of your community coalition, and any successes you may have already had. You can include one or more quotes from representatives from the school and your organization, or from the Member of Congress if his or her staff provides an advance quote.]

In [year], [agency name] received a [insert dollar amount] federal Safe Routes to School grant from [insert your state agency's name] to [brief description of purpose of grant]. *[If your program has not yet received a grant, but is applying for funding, indicate that this is the case.]* In 2005, Congress created the federal Safe Routes to School program due to concerns about the decline in walking and bicycling to schools and increases in traffic congestion and childhood obesity. Under the new transportation bill, MAP-21, Safe Routes to School funding is available through the new Transportation Alternatives program. Grants from the federal Safe Routes to School program are awarded by State Departments of Transportation and allow schools and communities to retrofit roads, sidewalks, and bike paths to allow

children to more safely walk and bicycle to school. Funding also supports education, promotion and enforcement campaigns. As more children are able to safely walk and bicycle to school, children and their communities benefit from reduced traffic congestion, better air quality, and healthier lifestyles.

#

About [your organization name]: [Include a 2-3 sentence summary of your organization, and include a link to your website, if appropriate.]

4. CARRYING OUT A SUCCESSFUL EVENT

RESOURCE: TIPS FOR GIVING INTERVIEWS

When serving as a spokesperson for your Safe Routes to School project, it's important to keep in mind the three or four main points you want to get across in your interview. Make sure to make these key points. Work them in to your responses, regardless of the questions, and stay positive! It's OK to repeat yourself in an interview to emphasize your message. You can download a word version of this resource at <http://www.saferoutespartnership.org/sites/default/files/pdf/toolkittools2012.doc>.

Deliver your main message. Here is an example of your key messages for an event:

- A) Today is the kick-off for our new "Safe Routes to School" project at XYZ School.
- B) We've worked hard to put together an application for the federal Safe Routes to School program. Now that we've received funding, we hope to encourage more children to walk and bicycle to and from school, as it helps kids learn healthier and more active lifestyles. We're also working with the police and engineers to make conditions safer.
- C) As more and more children take advantage of walking and bicycling to school, our community will benefit from less traffic congestion, better air quality, and our kids will have a lot more fun!
- D) If you are a parent, we hope you'll get in touch with us (give website or contact person) to learn more about how your child can safely walk or bicycle to school.

Here are the "top ten" interview tips, whether you are working with newspapers, radio or television:

1. Prepare (review your talking points) and stay focused on the issues
2. Be concise and speak clearly
3. Don't speak too quickly
4. Be friendly and honest
5. Don't lose your cool
6. There is no such thing as "off the record" – only say it if you are willing to be quoted
7. Don't be led into "hypothetical" situations – you'll be taken out of context
8. Say what you have to say and then stop talking
9. Mention where people can get more information (your organization's website and www.saferoutespartnership.org)
10. If you are asked a negative question, turn the negative into the positive and don't repeat negative words like "dangerous" or "unsafe." Anything you say is fair game to be quoted, so make sure that you keep it positive!

Here are some additional tips for television interviews:

1. Smile!
2. Make eye contact (look at the reporter not the camera).
3. Be conversational.
4. Ask in advance if the interview will include the reporter's questions and your answers or just your answers. If it's just your answers, speak in full sentences when answering the questions.
5. Solid, dark colors look best on television. Avoid patterns and light colors.

Regardless of the forum, it's also good to create a "sound bite." Keep in mind one phrase that you want to see in print.

5. CONDUCTING A SUCCESSFUL MEETING

If you have opted to request a meeting with your Member of Congress, you must now make sure you are prepared to make the most of your time with the Member. This section will help you get prepared to effectively make the case for your project and Safe Routes to School. Tools and resources are included in this toolkit and can also be downloaded in one word document at <http://www.saferoutespartnership.org/sites/default/files/pdf/toolkittools2012.doc>.

- **TOOL: Sample talking points on Safe Routes to School.** You can adapt these talking points with information about your local project to help guide your conversation at the meeting.

Understanding the Basics of a Meeting with a Member of Congress

Members of Congress have dozens of meetings with their constituents each week, and there are a few basics you should keep in mind for any meeting with a legislator:

- **Be punctual, but flexible.** Because Members of Congress have such busy schedules, your group must arrive a few minutes early for your appointment. If you are late, you may miss your opportunity to speak with him or her, or have your meeting time reduced. You should also understand if the Member of Congress is running behind and be as flexible as possible to accommodate any scheduling changes. At the beginning of your meeting, ask how much time you have with the Member.
- **Know your subject area.** You want the Member of Congress to see you as an expert on your project and Safe Routes to School. Make sure you've done your homework before the meeting and know the background on your project and Safe Routes to School. Have a good Safe Routes to School story to tell.
- **Be organized and succinct.** Members of Congress have extremely busy schedules, so you want to use your time with him or her as wisely as possible. Plan ahead on your message and who will deliver which messages. You may only have a few minutes with the Member of Congress, so make sure you are ready to clearly communicate your key points.
- **Focus on the local impact.** Members of Congress are elected to focus on the needs of their district and constituents. While it will help them to understand the national perspective, you should spend most of your time talking about the local impact of your project—what problems you are looking to solve, what activities you are undertaking to address those challenges, and what the impact will be on your community in the end.
- **Be honest.** Never, ever lie or exaggerate your project's impact. The Member of Congress should know they can rely on you to talk truthfully about your project. If you don't know the answer to a question, say you will look into it and get back to him or her.

Planning the Meeting Content and Message

Before the day of your meeting arrives, you should spend some time getting prepared. It will help to have in front of you the worksheet you developed in Section 1 identifying key messages and the partners you invited to the meeting, as well as the background materials you developed in Section 3. Here's a list of things you should think about and plan before the meeting:

1. Develop the talking points for the meeting. Re-read the “Identifying your Story” and “Engaging your Partners” in section 1 for ideas and the “Safe Routes to School: Helping Communities Save Lives and Dollars” resource fact sheet in section 3, and fill in the “Sample Talking Points” tool in this section with your local information. A couple of key messages to keep in mind:
 - a. The barriers that are preventing children from walking and bicycling to school, and how you will address them through your Safe Routes to School project.
 - b. The benefits to your community once your project is complete, such as health, safety, or reduced traffic congestion.
 - c. Any stories or data you have demonstrating the importance of your project and impact on your community.
 - d. The breadth of the coalition of partners you have engaged to carry out the project.
 - e. Importance of the federal Safe Routes to School program in providing the funding you need to accomplish these goals, and any local cost estimates of what it would take to make the school fully accessible to students walking or bicycling.
 - f. The ask: at the end of your meeting, you want to ask your Member of Congress to be supportive of Safe Routes to School. See the “asks” resource in section 3 for additional information on what to ask for. *Please note that if you are a nonprofit organization or if you receive federal or foundation dollars, you should refer to the Appendix for information about lobbying rules.*
2. Once you've identified the key points you want to address in the meeting, think about which of the meeting attendees is best suited to discuss each point. Ideally, each of the individuals who are attending the meeting should speak for at least a few minutes about their role in the project and why it's important to them.
3. Set up a group conference call or meeting with everyone who will be attending the meeting. Spend a half-hour or hour preparing, as a group, for the meeting. During this time, you should:
 - a. Identify the “leader” for the meeting. The leader will start the meeting off, introduce the other members of the group, and facilitate the flow of the meeting.
 - b. Discuss the talking points and make sure each member of the group is comfortable with their portion of the talking points and is familiar with basic information about the project and Safe Routes to School.
 - c. Review the flow of the meeting—who will speak, about what, and in which order.
 - d. Do a “dry run” of the meeting, with each participant in the meeting rehearsing their talking points.
 - e. Identify who will take notes on the Member's questions and responses, and any follow-up needed.

4. Prepare informational packets. See section 3 for more information on what to include in your packets. Make sure to bring several copies, one for the Member of Congress and extras for any staff that may be sitting in on the meeting.

Conducting the Meeting

On the day of the meeting, make sure all members of your group arrive a few minutes early. Once the Member of Congress arrives, you can begin the meeting. The designated leader for your group should manage the flow of the meeting, and make sure the following things happen during the meeting:

- Thank the Member of Congress for agreeing to meet with your group. Ask how much time the Member has, and be prepared to adjust your plan if necessary.
- The leader of the group should start the conversation by letting the Member of Congress know that they want to discuss the Safe Routes to School project in their community and give a very short (2-3 sentence) overview of the project and its benefits (such as health, safety, traffic improvements).
- The leader should then have each group member introduce themselves, providing their name, organization, and a brief explanation of how they are involved in the Safe Routes to School project.
- The leader should then follow the talking points and roles that were previously developed to direct the flow of conversation, and help tie the various speakers together. For example:

LEADER: One of the reasons we were so interested in undertaking a Safe Routes to School project is because so many of the children in XYZ school are struggling with obesity and obesity-related health issues. Today we have with us Mary Smith, who is the school nurse at XYZ school and deals with these problems every day. Mary, do you want to elaborate?

MARY: (Leader name) is correct. Nearly one-quarter of our students at XYZ school are obese, which is higher than the national average. I have dozens of children each week suffering from asthma, diabetes and other chronic health conditions that are exacerbated by weight and air quality.

That's why I'm so supportive of and engaged in the Safe Routes to School project. If we can get more of our children walking and bicycling to school regularly, it will mean an average of 30 minutes of exercise each day. That's half of the recommended amount for children, and will make a big difference in our efforts to help kids be more active and healthy. If we can start changing these habits now, which the children are still young, it will pay dividends for years to come in terms of improved health and less strain on our health care system.

LEADER: Thanks, Mary. [The leader would then introduce the next main talking point, and engage the next speaker in addressing the comment.]

- The leader should also make sure that there are natural pauses in the conversation, between speakers, to allow the Member of Congress an opportunity to ask follow-up questions without interrupting each speaker. These questions and interactions are very important, because it will help you get a sense for what topics seem particularly interesting to the Member of Congress, and whether he or she seems supportive of the Safe Routes to School concept.
- The leader should also keep a close eye on time so that the meeting does not run over the time allotted. As the time comes to an end, the leader should bring the conversation to a close. The leader should at this point thank the Member of Congress for listening, and “make the ask” for his or her support of the Safe Routes to School program. See the “asks” resource in section 3 for additional information. *Please note that if you are a nonprofit organization or if you receive federal or foundation dollars, you should refer to the Appendix for information about lobbying rules.*

An example of “the ask” follows:

LEADER: Congressman/woman [Name], we so appreciate your time today. We hope you have a better understanding of the work we have ahead of us with our Safe Routes to School project at [school name or community name.] Before we close out the meeting today, I’d like to ask you, on behalf of our group here and our community, if you would support the Safe Routes to School federal program.

It’s our understanding that Congress will be considering the next transportation bill in 2014. The most recent transportation bill, MAP-21, folded the Safe Routes to School program into a new program called Transportation Alternatives and cut funding by approximately 30%. When the transportation bill comes up again, I ask you to work to increase funding for Safe Routes to School and sustain the federal commitment to these critical safety projects.

Do you think this is something you would be interested in supporting, based on what you’ve learned from us today?

[If the Member is noncommittal: Is there any more information you need to help with your decision?]

- Then, ask who on the Member’s staff you should follow up with for updates on your project or more information, and get contact information for this staffer.
- At this point, the meeting is now coming to a natural close. The leader can once again thank the Member of Congress for their time, and exit the meeting. If you have a camera, this is a good time to ask if you can take a photo of the Member with your group.

5. CONDUCTING A SUCCESSFUL MEETING

TOOL: SAMPLE TALKING POINTS ON SAFE ROUTES TO SCHOOL

You can adapt these sample talking points to communicate the goals and impact of your local Safe Routes to School project and to ask for your Member's support for the reauthorization of Safe Routes to School. You can download a word version of this tool at <http://www.saferoutespartnership.org/sites/default/files/pdf/toolkittools2012.doc>.

GROUP LEADER:

Thank you, Congressman/woman [Name], for agreeing to meet with us today. I know you have a very busy schedule, and we appreciate you making time for us.

I've brought some of our community leaders with me today so we can talk about an exciting project we're working on at [school name or community name.] We've recently received [or have applied for] a [dollar amount] grant from [state agency] to undertake a "Safe Routes to School" project, to enable more children to safely walk and bicycle to and from school. [Give 2-3 sentence overview of the challenges you are looking to address through the project and what you hope to accomplish in terms of safety improvements, increases in walking/bicycling rates, and improvements in air quality, traffic congestion, child health, etc.]

Before we go any further, I'd like to introduce some of the key partners that we are working closely with on this project.

GROUP MEMBERS:

I'm [name], the [title] of [organization]. Our role/interest in the Safe Routes to School project is [brief 1-sentence description.]

GROUP LEADER:

We are so lucky to have these great partners working with us on the Safe Routes to School project, and know we will be successful based on their dedication and commitment to this project.

I'd like to give you a little background on the Safe Routes to School national movement, and our specific project. As you know, in 2005, Congress created the federal Safe Routes to School program, and funds are awarded by each state's Department of Transportation. That's where we got [or are applying for] our funding for this project. With the new transportation bill, MAP-21, Safe Routes to School is eligible for funding under the new Transportation Alternatives program.

Grants from the federal Safe Routes to School program allow schools and communities to retrofit roads, sidewalks, and bike paths to allow children to more safely walk and bicycle to school. Funding also supports education, promotion and enforcement campaigns. As more children are able to safely walk and bicycle to school, children and their communities are benefiting from reduced traffic congestion, better air quality, and healthier lifestyles.

When we heard about the funding available through Safe Routes to School, we knew it would make a big difference in our community.

[At this point, you should plan to focus on local information about the barriers to walking and bicycling around the school, and how your project will address them. Each of these areas could be good opportunities for other members of your group to talk, depending on their areas of expertise. For example:

- The engineer on your project could talk about the dangerous road crossings and sidewalk gaps, which you would like to address through improved infrastructure
- A community advocate could talk about how children lack necessary knowledge on pedestrian and bicycle safety, which you will address through safety trainings for children and their parents
- A law enforcement official could discuss statistics about the high rate of drivers that speed and disobey traffic signals near the school, which you will address by increasing traffic enforcement and undertaking a driver education campaign
- The school principal could talk about the current rate at which children walk and bicycle to school, and the promotional campaigns and events you will undertake to change their habits and encourage more parents to allow their children to walk and bicycle to school.
- The school nurse could talk about obesity rates at the school and how increased physical activity will improve the health of schoolchildren.

The group leader should introduce each topic area and speaker. For example:

LEADER: One of the reasons we were so interested in undertaking a Safe Routes to School project is because so many of the children in XYZ school are struggling with obesity and obesity-related health issues. Today we have with us Mary Smith, who is the school nurse at XYZ school and deals with these problems every day. Mary, do you want to elaborate?

MARY: (Leader name) is correct. Nearly one-quarter of our students at XYZ school are obese, which is higher than the national average. I have dozens of children each week suffering from asthma, diabetes and other chronic conditions that are exacerbated by weight and air quality.

That's why I'm so supportive of and engaged in the Safe Routes to School project. If we can get more of our children walking and bicycling to school regularly, it will mean an average of 30 minutes of exercise each day. That's half of the recommended amount for children, and will make a big difference in our efforts to help kids be more active and healthy. If we can start changing these habits now, which the children are still young, it will pay dividends for years to come in terms of improved health and less strain on our health care system.

LEADER: Thanks, Mary. Another important aspect of our project is improving the traffic conditions around the school, which are currently unsafe. Police Chief Jones has been really instrumental in helping us assess the traffic problems and figure out solutions. Chief Jones?

CHIEF JONES: When (Leader name) got in touch with us to talk about this project, we ran some analyses of the traffic around [school name]. Frankly, we were surprised at what we found. One-third of drivers are exceeding the speed limit in the area by more than ten miles an hour. Since children are often walking at the edge of the road, this creates a very dangerous situation. We've had several near-misses recently. Over the next several months, we will be posting

officers around the school before and after adjournment each day and will be strictly enforcing speed limits, stop signs, and crosswalks. We will also be working with the local media to help publicize the importance of being aware and driving safely when in school zones. We believe these efforts will create much safer conditions around the school, which will mean more parents will be comfortable allowing their children to walk and bicycle to school.

GROUP LEADER:

As you can see, there are a lot of pieces to our Safe Routes to School project, all of which are necessary to get us to our end goal of having more children walk and bicycle safely to school. We are very much focused on our end goals, as that is how our community will see the benefits of our work. [Insert some information about the goals you are looking to accomplish, such as the increase in children walking/bicycling to school, traffic targets (less congestion, improved safety), and other related benefits (better air quality, lower rates of obesity, etc.)]

We will be carefully tracking our progress on all of these areas to ensure we will meet our goals. We've already started to see the impact of our work. [Insert some statistics or anecdotal stories demonstrating the impact you are already having on the community.]

Congressman/woman [Name], do you have any questions for us yet?

GROUP LEADER:

Congressman/woman [Name], we so appreciate your time today. We hope you have a better understanding of the work we have ahead of us with our Safe Routes to School project at [school name or community name]. Before we close out the meeting today, I'd like to ask you, on behalf of our group here and our community, if you would support the Safe Routes to School federal program.

It's our understanding that Congress will be considering the next transportation bill in 2014. The most recent transportation bill, MAP-21, folded the Safe Routes to School program into a new program called Transportation Alternatives and cut funding by approximately 30%. When the transportation bill comes up again, I ask you to work to increase funding for Safe Routes to School and sustain the federal commitment to these critical safety projects.

Do you think this is something you would be interested in supporting, based on what you've learned from us today?

- *[If the Member is noncommittal]* We definitely understand that you and your staff probably have to review our information further before coming to a decision. Is there anything else we can provide that will help with your decision? Who on your staff should we follow up with to see when you've reached a decision?
- *[If the Member says yes]* That's wonderful, we really appreciate it. Who on your staff should we be in touch with as we have updates on the project or more information on the reauthorization?

- *[If the Member says no]* We're very sorry to hear that. Is there any more information we could provide that could change your mind? Who on your staff should we follow up with?

GROUP LEADER:

Thank you again, Congressman/woman [name] for your time today. We very much appreciate it, and will keep you and your staff posted on our progress.

6. FOLLOWING UP AFTER THE EVENT OR MEETING

Even though the hard work of your event or meeting is over, there are a few last quick but important items you should complete. You should thank your Member of Congress, and remember to keep them up-to-date in the future through their staff. And, we hope you will let the Safe Routes to School National Partnership know how your event or meeting went by visiting <http://www.saferoutespartnership.org/national/engaging-congress-in-srts/update-srts-about-your-event>. This will help us follow up with the Member and his or her Washington, DC staff to secure their support for Safe Routes to School.

The information and tools below will help you accomplish these steps quickly. Tools and resources are included in this toolkit and can also be downloaded in one word document at <http://www.saferoutespartnership.org/sites/default/files/pdf/toolkittools2012.doc>.

- **TOOL: Sample thank you letter.** You can adapt this thank you letter with information about your local project.
- **RESOURCE:** We have created a form on the Safe Routes to School National Partnership website where you can report in about your event or meeting. It should only take a few minutes to fill out. Please go to <http://www.saferoutespartnership.org/national/engaging-congress-in-srts/update-srts-about-your-event> to update us about your event or meeting, and the reaction of your Member of Congress. We will also collect these stories and photos from the events and post them online, so that others can learn from your experiences when planning their own event or meeting.

Thanking the Member of Congress and Staff

It's important that you formally thank the Member of Congress for attending your event or meeting with you. This thank-you note gives you an opportunity to reinforce your message in support of the Safe Routes to School program, and to continue to build a relationship with your Member of Congress.

Take a look at the Sample Thank You Letter tool, and personalize it with information about your project and partners. Make sure you send this within a week of the event or meeting. You should also call or email any of the Member's staff who helped with the event or meeting (such as the scheduler, the press secretary, or another staff person who accompanied the Member to the event or meeting) with thanks for their assistance.

If the Member of Congress attended an event, be sure to include with the thank you note any newspaper clippings on the event (particularly if they feature a quote from the Member of Congress) or a couple of photographs of the Member of Congress speaking at the event or interacting with constituents. The best way to deliver this note is to hand-deliver it to the district office, as letters sent via postal mail go through a lengthy security screening process, delaying them. If you must use mail, be sure to email or fax a copy of the thank you letter so the Member receives it promptly.

Keeping in Touch with your Member of Congress after the Event

The event or meeting you had with the Member of Congress can serve as the beginning of an ongoing relationship. Now that he or she is familiar with your project, and you hopefully have the name and contact information for the staff person for follow-up, it's important to keep in touch. This will help build a relationship with the Member of Congress, and help make sure he or she doesn't forget about your project. Some ideas for how you can follow up include:

- Make sure to add the Member's staff to the list for any newsletters or project updates you email or mail out. Be careful not to "spam" the staff with unnecessary information.
- As you have future events for your Safe Routes to School project, make sure to send an invite to the member and staff. You shouldn't necessarily expect they will attend, but the invitation can serve as a reminder about your organization and project.
- If you haven't communicated with your Member's office in a while, consider sending a "quarterly update." Write a quick friendly note to the Member referencing your past event or meeting, and providing some new information (news about your progress, mention of an upcoming event, etc.) about your project.

It's also important that you let the Safe Routes to School National Partnership know about your event or meeting with your Member of Congress. As soon as possible after your event or meeting, please go to <http://www.saferoutespartnership.org/national/engaging-congress-in-srts/update-srts-about-your-event> and fill out the form we've provided with a brief summary of your event or meeting, how the Member of Congress reacted, and whether he or she agreed to support Safe Routes to School in the transportation reauthorization bill.

Safe Routes to School National Partnership will follow up with the Member's Washington, DC staff to make sure they are aware of your local event or meeting, and work with them to formalize the Member's support for our Safe Routes to School reauthorization recommendations.

Closing Thoughts

We want to thank you for taking the time to review this toolkit, and hope it was helpful as you planned an event or meeting for your Member of Congress. If you have feedback on how to improve the toolkit, please contact Margo Pedroso with the Safe Routes to School National Partnership at margo@saferoutespartnership.org.

The Safe Routes to School National Partnership is committed to advancing the Safe Routes to School movement all across the country, and in ensuring that the federal commitment to Safe Routes to School is sustained in the next transportation reauthorization bill.

Your help is absolutely essential to that effort. If Members of Congress don't hear about or see firsthand the impact of Safe Routes to School funding, they will be less likely to champion the Safe Routes to School program. Thank you for your efforts in helping build additional Congressional champions for Safe Routes to School.

6. FOLLOWING UP AFTER THE EVENT OR MEETING

TOOL: SAMPLE THANK YOU LETTER

You can use this sample letter to thank your Member of Congress for attending your event or meeting with you. Fill in any bracketed areas with information specific to your project. Try to keep the letter to one page, put it on your organization's letterhead if possible, and send via fax, email or hand delivery within a week of the event. You can download a word version of this tool at <http://www.saferoutespartnership.org/sites/default/files/pdf/toolkittools2012.doc>.

[Date]

The Honorable [Member's First and Last Name]
U.S. House of Representatives
[Mailing address (obtained through the CongressMerge website)]

Dear [Representative or Senator] [Member's Last Name]:

On behalf of the coalition of organizations working on the Safe Routes to School project at [school name], we thank you for [attending our event / meeting with us] last week. We know how very busy your schedule is, so we greatly appreciate that you were able to fit us in.

We hope that you found your time with us to be informative and interesting. By making it safer for children to walk and bicycle to school, our entire community will benefit from reduced traffic congestion, better air quality, and healthier lifestyles for our children. [If the Member attended an event, and you have any photos or news clippings to share, insert a sentence about that and enclose copies.]

We look forward to continuing to keep you and your staff up-to-date on our progress on our Safe Routes to School project. And, I hope that you will remember the Safe Routes to School program when Congress takes up the next transportation reauthorization bill, and help push to sustain and strengthen the program.

Please let me know if you have any questions or I can be of assistance to you or your staff in the future. I can be reached at [insert phone number and email address].

Thank you again for your time last week, and for your support of Safe Routes to School.

Sincerely,

[Your Name]
[Your Organization]

cc: [list individuals and organizations who are mentioned in the letter as attending/participating in your event or meeting]

7. APPENDIX: LOBBYING VERSUS EDUCATION RULES AND REGULATIONS

Through effective advocacy, organizations can bring greater awareness to their program and issues, increase funding levels, improve the system through policy changes, and affect larger numbers of individuals than what is possible solely through direct service. But, in order for these changes to happen, organizations must make sure their voices are heard by legislators. There is often confusion about what “lobbying” is and who can engage in lobbying.

Lobbying is a series of actions intended to influence legislators, the executive branch, or other government officials to support your cause. That might mean asking them to introduce a bill, or to vote a specific way on a piece of legislation or a budget. Lobbying does not necessarily mean making political donations—“public interest” lobbying means providing information to a legislator about your legislative issue and letting the facts and necessity of your cause sway your legislator.

There are some rules and regulations to keep in mind, however.

- 501(c)(3) Nonprofits are indeed allowed to lobby—but lobbying must be an **insubstantial part** of the nonprofit’s activities.
 - If your nonprofit will be doing lobbying regularly, it makes sense to register with the IRS by filling out IRS Form 5768. This provides definite caps on lobbying expenditures (20% of the 1st \$500,000; 15% of the next \$500,000, etc.) You must then track your lobbying expenses and report on them when you file your organization’s tax return.
 - If you will only be doing an occasional meeting or event, it is not necessary to register.
 - Nonprofits are not allowed to make campaign contributions or support specific candidates in any election.
- Federal grants OR the funds used to match federal grants cannot be used for lobbying. But, organizations with federal grants CAN use money from other sources to lobby.
- Private foundations and churches are not allowed to lobby.
- Grants from private foundations may have restrictions on use for advocacy/lobbying. Generally, the grant funds themselves cannot be used for lobbying, but an organization’s other funds that do not have such restrictions can be used for lobbying.

If you are at all nervous about these lobbying rules and recommendations, you can consider “educating” your Member of Congress instead of lobbying. Educating your Member of Congress means you can inform him or her about how Safe Routes to School has benefited or will help your local community—but that you do not “make an ask” for the Member of Congress to support a specific piece of legislation or vote a certain way.

Additional resources on lobbying rules and regulations are available at the following websites:

- Charity Lobbying in the Public Interest: <http://www.clpi.org>
- Independent Sector: http://www.independentsector.org/programs/gr/advocacy_lobbying.htm