



Arranging a Congressional Site Visit

The National Trust for Historic Preservation and partners throughout the country are engaged in a campaign to build support for the Historic Tax Credit (HTC) with legislators on Capitol Hill. Visiting an HTC project provides legislators with a unique opportunity to see first-hand how the federal government is leveraging significant private investment for the reuse of historic buildings; the jobs created by the project; the broader economic activity in the surrounding neighborhood; and how the historic character of the building is preserved. Below are recommendations on how to arrange a Congressional site visit.

Planning and Asking for the Site Visit

- **Identify the HTC project** – This project should highlight the benefits of the HTC program.
- **Define the event type to showcase your selected HTC project** – Offering a tour either during construction or after a property is placed in service are great ways to highlight different aspects about the value of the program. For events that require significant planning or financial commitment, like a grand opening reception, make sure the event would be a success even if the legislator has to cancel.
- **Create a planning team** - Involve partners such as developers, state and local preservation and Main Street organizations, as well as National Trust advisors in planning a site visit as they may have connections to the Member you are trying to reach. A diverse group will also help you respond to a broad array of questions from the legislator.
- **Select a range of dates for event** - Congressional in-district work periods are set at the beginning of each year. Be prepared to be flexible on dates in order to secure a commitment. Select several dates for a site visit or be flexible for any day that works best for the legislator during the recess.
- **Contact Congress** – Call your congressional offices to ask how to send a site-visit request to the Member of Congress. If an email invitation is requested, use the provided email template (see page 3) and create the message to reflect your voice.
- **Follow-Up** - Scheduling is the most difficult aspect of a site visit. If you do not receive a reply from a Congressional office after a week, acknowledging receipt of the request, follow-up via e-mail and phone. Develop a rapport with the scheduler by being patient and persistent. Continue to gently and respectfully follow-up, checking-in every 7-14 days. If one Congressional in-district work period does not work, refocus on the next Congressional recess. You may also receive a response offering a staff member—either from Washington or the district office — to tour the project. Spending time with Congressional staff is highly valuable and can be instrumental in making the case for the HTC. Accept such an invitation but politely explain you are still interested in having the Member of Congress tour the property. Use the staff visit to develop your relationship with the office with the aim that you become a trusted advisor and resource on historic preservation issues.

Once the visit is confirmed on the Member’s schedule:

- **Coordinate topic leads** - Connect with your team and decide who will tell which part of the tax credit story. For example, who will describe details about financing of the project, impact on the neighborhood, details about the Historic Tax Credit Improvement Act (“HTCIA” – HR.1158 and S.425) and historic significance of the building? Check the National Trust and NTCIC websites for regularly updated HTC talking points as a resource.



- **Produce marketing package** – The Trust has created PDF packages for all states that include: a state map, a list of HTC projects from 2002-2016, and a fact sheet on economic impacts. Also included will be a description of the HTCIA. Packages can be downloaded at forum.savingplaces.org/federal-htc. Other helpful handouts could include a document describing the history of the building and its contribution to the community with an explanation on how the financing gap is filled by the HTC. Before and after photos are always great.
- **Gauge media interest** - Before the visit, discuss with your Member's office if the Member is interested in having media at the site visit. Would your representative prefer a behind-the-scenes tour or something that will generate media attention? If media coverage is requested, offer to share the marketing package with the office in advance.
- **Maintain communication** – As you confirm final details and on the day of the visit, be in close communication with the Member's staff to confirm arrival time and last minute changes. Make sure to share your cell phone number with your office contact. Have a plan B to accommodate a Member's possible late arrival.
- **Activate your pitch** - During the visit, ask your legislator to support the retention of the HTC in a reformed tax code. Specifically ask your Member to consider co-sponsoring the Historic Tax Credit Improvement Act. If they express interest, encourage them to help advocate for the value of the HTC with colleagues who serve on the House Ways and Means Committee and the Senate Finance Committee.
- **Stay engaged** - During the visit, the Member of Congress may have questions for which you do not have an answer. It is entirely appropriate to simply state you do not have that information, but that you would be happy to follow up with the Member's staff as soon as possible. Ask who should receive this information.
- **Follow through** – Within five business days, send a thank you letter or email to the legislator and staff contacts that includes additional helpful and/or specifically requested information. With access to the Member's office, and with strong follow up, you will be considered a key resource on the HTC program. Two to three weeks after the visit, follow-up with the Member's staff to see if they have co-sponsored the bill.

Need Help?

If you need assistance setting up a site visit for your legislator, please contact campaign staff:

- **Shaw Sprague, National Trust for Historic Preservation** - ssprague@savingplaces.org
- **Renee Kuhlman, National Trust for Historic Preservation** - rkuhlman@savingplaces.org
- **Michael Phillips, National Trust Community Investment Corporation** - mphillips@ntcic.com



Site-visit Request Email Text Template

Feel free to edit the message below to reflect your voice

To: Washington, DC & In-District Scheduler
CC: Office Staff
Subject: Site Visit Request-Historic Rehab of **Project Name, in City/town**

Greetings,

We would like to invite **Rep/Sen XXX** to see the recent historic redevelopment of **Project Name, in City/town**, during the August congressional recess (7/28-9/4). **The project was just completed or will be/was completed in Month and Year** and used federal Historic Tax Credits (HTCs), which were essential for this project.

Insert 2-3 sentences on the HTC project(s) here

As Congress considers tax reform, we would like to share with the **Rep/Sen XXX** the types of projects that are using an important economic redevelopment incentive. We would also like to demonstrate to **Rep/Sen XXX** how these difficult projects are not possible without the HTC. This incentive attracts investors to historic property project(s) and at the same time adapts and preserves these previously vacant or underutilized historic structures that can be a blighting influence on the community.

We are thankful for **Rep/Sen XXX**'s interest in learning more about the federal HTC and would like to share with him recent bipartisan legislation, the HTC Improvement Act (S.425, and H.R. 1158). This bill would greatly benefit **State/District** by modernizing the HTC's regulations and driving more outside investment to smaller main street buildings and communities.

Please let us know whether **Rep/Sen XXX** is available to see the project during the August recess, and we'll follow up with you to make the necessary arrangements. Please do not hesitate to contact me directly.

Sincerely,

Your name/organization
Phone number