

365-Day Advocate Education and Engagement

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Philosophy....



.... *Of course* they
want to advocate...

Reality....



... life gets in the way.

Lets take a step back...

*Before we can talk about 365
advocacy...*



...you have to have structure.

What's your structure? Process?



Plan. Set Goals.

Have a clear purpose for engagement.

- What are your key issues this year?
- What elected officials are important to your issues?
- How will you advocate on those issues?
- What role will your advocates play?
- What resources will they need?



Educate. Motivate.

Position them to succeed. Make it easy.

- How are you going to educate your advocates? Phone? Webinar? Email? Formal training?
- What motivates your group? What de-motivates them?
- What makes the process easy, yet engaging?
- What makes “volunteering” easy?
- How do you lead a group that you might not see?



Engage. Mobilize.

Keep it interesting for them.

What's in your toolbox?

To engage your advocates.

- Connection with mission/values.
- Leadership development.
- Leadership roles.
- Publicity/ Recognition.
- Education/ Expertise.

To mobilize for 365 action.

- Congressional site visits
- District office meetings
- Fly-Ins (DC and local)
- Fundraisers
- PAC recruitment
- Contests
- Goals



Celebrate. Evaluate.

Make them feel successful.

- Political wins – big, small.
- Emotional wins – respect, authority, ego.
- Evaluation
 - What does success mean? Even if you don't win on the issue?



Political Involvement Leader Program Overview

- Structure
- Benefits
- Responsibilities
- Activities



PIL Program Examples



All MoC's divided by PIL

GO Name	First	Last	local meetings for Jan-Feb); Red indicates high priority	LOCAL BUDGET
Tucson General Office	Seth	Krasne	Grijalva, O'Halleran	McSally \$5,000 ldrshp budget
Arizona General Office	Barry	Cook	Sinema, Franks, Gosar, Gallego,	Flake \$2,500 budget; Sinema \$2,500 ldrshp budget
Covina Valley General Office	Fred	Kabir	Chu, Torres,	
Central Coast General Office	Randy	Giorgi	Brownley	
Greater Pasadena General Office	Christina	Camiling	Schiff, Napolitano, Roybal-Allard	
Inland Empire General Office	Jack	Knight	Ruiz, Takano	
San Diego General Office	Josephine	Pemberton	Peters, Hunter, Vargas	
Stockton General Office	Lars	Willerup	McNerney	Denham \$5,000 budget; Denham \$5,000 ldrshp budget; McNerney \$1,000 budget
East Bay General Office	Dirk	Welzien	Lee, Swalwell, DeSaulnier	Swalwell \$5,0000 budget
Santa Clara General Office	Raymond	Luk	Pannetta	
San Fernando Valley General Office	Michael	McCaffrey	Cardenas	
Greater San Francisco General Office	Ralph	Sklar	Speier, Pelosi , Huffman	
Northern California General Office	Blaine	Johnson	Thompson , Matsui, Bera, Lamalfa,	Lamalfa \$5,000 budget
Silicon Valley General Office	Victoria	Viso	Eshoo, Lofgren	
Central California General Office	Clayton	Blanton	McCarthy , Costa, Valadao	Nunes \$5,000 ldrshp budget
Orange Coast General Office	Yevgeniy	Vitebskiy	Issa, Walters	
Fullerton General Office	Larry	Bennett	Linda Sanchez , Calvert	Royce \$5,000 ldrshp budget
Los Angeles General Office	David	Brecher	Bass, Waters, Lieu, Barragan,	
Orange Coast General Office	Troy	Wirth	Lowenthal, Correa	
Colorado General Office	Penny	Hardrick	DeGette, Polis, Lamborn, Coffman, Perlmutter, Buck	
Connecticut Valley General Office	Daniel	Finn	Larson ,	
Southern Connecticut General Office	Michael	Gabriel	Etsy	
Southern Connecticut General Office	Daniel	Nichols	DeLauro	Himes \$5,0000 ldrshp budget

PIL Program Examples



PIL Conference

- Building community
- Annual goals
- Educate/ Train
- Fun
- Legislative meetings



PIL Program Examples



Presentations with talking points

Political Involvement Update

<NAME>
GO Political Involvement Leader

Click to add text

Our Message to Congress

- Mutuality.
- Local community presence.
- Products protect your constituents.
- Maintain tax policy for our products and reserves.
- Don't tax us to pay for another industry's tax cut.



- In every legislative meeting, we educate members about mutuality, our company, and the state. We explain how agents help their constituents.

- Even if you know nothing about tax policy, each of us has the skills and knowledge to an elected official.

Educate about NYL

NYL is a local company.
We serve and are owned by your constituents.
We focus on the middle market.
Our products keep good going.
Our products fill the void created by dwindling pensions.

Educate about issues

- We seek to maintain the current and proper tax treatment of our products.
- Taxing our products and reserves would lead to less financial security for our constituents.

Ask

- When you consider public policy related to life insurance and retirement, please consider NYL as a local resource.
- We can tell you how such decisions impact your constituents.
- We want to do the right thing for our customers, your constituents, as well as the state.

NOTE: TALKING POINTS CHANGE AS ISSUES DEVELOP.

What's in it for me?

-  Increase your knowledge
➢ Learn about local issues, local leaders, issues you care about.
-  Expand your network
➢ Town halls, community events, fundraisers.
-  Differentiate yourself to clients
➢ "Mr. Client, I just met with Senator Smith about the retirement problem in the US...I'm here for you."
-  Become a resource for elected officials
➢ Help officials learn about insurance.

- Doesn't matter whether you are Republican or Democrat or indifferent.

- Without strong constituent advocates, we wouldn't have been as successful as we were on the DOL front.

- We don't want the first conversation with a legislator to be asking them for something—relationships built over the long-run pay off.

- It's important that we are building political relationships year-round, not just in moments of crisis.

- Through political participation, you'll gain community capital - Becoming politically active will allow you to connect with community members you wouldn't otherwise have engaged with. From local to national issues, find groups of people who share a common goal and work towards it together - you'll be stronger in a group, and you may find more success.

presentations with talking points

What's in it for me?



Increase your knowledge

➤ *Learn about local issues, local leaders, issues you care about.*



Expand your network

➤ *Town halls, community events, fundraisers.*



Differentiate yourself to clients

➤ *"Mr. Client, I just met with Senator Smith about the retirement problem in the US...I'm here for you."*



Become a resource for elected officials

➤ *Help officials learn about insurance.*



Sell why advocacy is important.

WIIFM?

PIL Training - Handbook

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Appendix A

Materials to promote PIL role

Email to GO about PIL Role

Dear Colleagues,

I would like to share some great news with you. I have been nominated by <Managing Partner Name> to serve as the Political Involvement Leader for our GO.

As a Political Involvement Leader, I will be updating the GO throughout the year on public policy issues impacting New York Life and may seek your participation in meetings with our members of Congress. If you have relationships with our state's congressional delegation and/or would like to participate in meetings, please let me know.

As Congress considers tax reform and federal regulation of large insurers, it's important that our elected officials understand New York Life, our products and how we serve their constituents.

Should you have any questions about New York Life's public policy agenda, please don't hesitate to contact me.

Sincerely,

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District Office Meetings

Overview
It takes time, persistence and flexibility to organize a district office meeting with an elected official. But the results are worth it. According to the Congressional Management Foundation, visits from constituents are the best way to influence a member of Congress.

Before scheduling

Mail the scheduler your meeting request. Emily Gonce can provide scheduler contact information. The appendix includes a sample meeting request email. It is important to make sure the scheduler received the request. Reiterate that you'd like to arrange for a district office meeting. The scheduler may ask you to fax the request. Follow up regularly (via email and phone) until you get a date. Keep in mind that meetings will most likely occur on a Monday or Friday, or when Congress is on recess. Be patient and polite. Schedulers control access to Members.

Before following up

Be as specific as possible. Emphasize why it is important that you meet with your Member and what kind of connection you have to the district/state. Clearly identify yourself and your company/agency. Identify yourself as a constituent. If you are not a constituent, mention that you work in the district/state and that you serve their constituents. Also include the name and hometown of the constituents attending.

Before the meeting

If the meeting is scheduled, inform Emily Gonce. Emily will provide you with information on what to bring, talking points, and local NYL data that will prepare you and others for the meeting.

You will need to recruit 3-5 constituents from your GO to join you. You should also inform your Member of the meeting.

After the meeting

Send a thank you note to person with whom you met. Copy the Scheduler and District Director on the note. Mail meeting summary and any photos to Emily Gonce. Inform your GO about the event either in-person at a GO meeting or via email.

Appendix B

Materials for DO Meetings and GO Visits

District Office Meeting Scheduling Email

TO: Scheduler(s)
CC: District Director
FROM: PIL
RE: Scheduling In-State Meeting

Dear <Elected Official Name>:

I am writing to request a meeting with you at your local office in <insert city name>.

I am a local agent for New York Life Insurance Company and I work with hundreds of constituents in <insert state> providing financial security.

Attendees at the meeting will include 3-5 local agents (constituents) from New York Life Insurance Company. We would like to discuss insurance issues affecting the <insert #> New York Life constituents in <insert state>.

I will be in touch to arrange a mutually convenient time for the meeting, ideally within the next 30 days (ex. first half of the year). My contact information is included below.

Thank you for your time and consideration.

Sincerely,

<Name>

<Contact Information>

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Materials for DO Meetings and GO Visits- Cont.

Email inviting agents to GO event with an elected official

TO: GO or select agents

FROM: PIL or MP

RE: Congressman____ Visit to ____GO

Please join me, and Managing Partner_____, on <Date> at <Time> when Congressman <Name> will visit our GO. S/He will speak about his/her priorities in Congress and take questions from the audience.

<Insert biographical info of member, example below>

Congresswoman Wasserman Schultz began serving in Congress in 2005, after serving for 4 years in the FL State Senate and for 8 years in the FL State House. She is a graduate of the University of Florida. She resides in Weston, FL with her husband Steve and three children. In addition to her responsibilities in Congress, she has served as the Chair of the Democratic National Committee since 2011.

Public policy at the federal and state level can have a significant impact on NYL's business. From determining the tax treatment of our insurance and investment products to shaping the rules for retirement plan sales, legislative and regulatory developments create opportunities and challenges for NYL.

Your attendance helps show that NYL is an engaged participant in important public policy debates.

IL Program Examples



History at New York Life

Past

- As - needed
- Loose tracking
- No strategic long-term perspective
- No incentives or formal recognition of advocates.
- Little knowledge from senior leaders
- **365... sometimes**

Present

(PIL Program)

- Formal program; Executive support
- Core advocates
- Strategic, long-term approach
- Incentives, recognition, rewards
- Strong senior leadership support
- **365... all the time**

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