This workshop was held at the 2018 Equal Justice Conference in San Diego, California.

Title:

Educating Legislators About Legal Aid 2.0

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This session is designed to build on the workshops we have done for the past few years on how to explain legal aid as constituent services to legislators and staff. Many LSC grantees and other legal aid programs have begun to develop relationships with federal and state legislators and staff; we want to identify ways to build on and expand those connections, e.g., provide training for district caseworkers and involve legislative staff in community outreach efforts.
Educating Legislators About Legal Aid

By Carol A. Bergman, Vice President, Government Relations & Public Affairs
Legal Services Corporation

Legislation to create the Legal Services Corporation (LSC) was signed into law by President Nixon in 1974, and federal funding for civil legal aid has enjoyed bipartisan support ever since. Taking the time to educate federal and state legislators about our work is central to ensuring that they understand how tax dollars are being spent in their communities.

We have organized workshops at national conferences over the past few years to help all legal aid programs learn different ways to reach out to legislators to explain the value of the constituent services provided, so that legislators see legal aid programs as the resources they are.

LSC grantees are prohibited from lobbying — that is, from contacting legislators to seek support for LSC funding. Grassroots lobbying is also prohibited, making it illegal for LSC grantees to ask others to contact legislators and seek their support for LSC funding.

LSC grantees are permitted, however, to educate Members of Congress, congressional staff, and the public about the role of civil legal aid in their communities. In workshops at the annual NLADA conference and at the Equal Justice Conference, we have encouraged people to reach out to their congressional Representatives and Senators and invite them to see the programs that serve their districts and states and learn about the work being done on behalf of their constituents.

Constituents often call upon their legislators for help when veterans’ or other benefits are denied, when they are victims of consumer fraud, or when a natural disaster occurs. Referring eligible constituents to legal aid is an important service. What follows is a basic primer on setting up meetings with Members of Congress and their staff, and several examples of what that can look like in action in two different states: Wisconsin and Ohio. Although the focus here is on federal legislators, the guidance is equally applicable to elected officials at the state level.

Nuts and Bolts

Scheduling meetings with Members of Congress and congressional staff can be labor-intensive — but it is well worth the effort. Preparation is key, as you will see from some of the stories below, to ensure that the meetings are as productive as possible.

Whom to meet with: LSC grantees service areas do not necessarily track with congressional districts. As a result, your service area may touch multiple congressional districts. It is important to reach out to all legislators representing your service area. Civil legal aid enjoys bipartisan support in Congress, and all Members care about providing good constituent service. Personal relationships can be critical to helping legislators understand our work.

And don’t forget about newly elected Members. You can be a great asset to a new legislator just learning the job.

Where to meet: The first decision is where to meet: in the district or in Washington. There are many advantages to meeting legislators in their districts. First of all, it is easier and less expensive for you — you live there. Secondly, legislators are often much more accessible in their districts. You just need to pay attention

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congressional staff, and the public about the role of civil legal aid in their communities.
to the congressional calendar, which is available from the Speaker’s office in the House and from the Majority Leader’s office in the Senate. Legislators have regularly scheduled work periods around most federal holidays, in addition to often being in the district on Friday or Monday. And thirdly, it is the caseworkers in the congressional office in the district who are likely to be most familiar with the work of legal services. That is because constituent calls about problems and challenges that people are facing are directed to the caseworkers, so they are apt to be a sympathetic ear.

Another option is to invite legislators and their staff to come visit your program. As you will see from the stories below, this can be a wonderful opportunity to showcase the work you do on behalf of their constituents.

Of course you can also go to Washington and set up meetings with legislators there. That can be more complicated; it is easier to start with meetings in the district and then decide if a trip to Washington would be a good use of your time and budget.

**How to ask:** It can be intimidating to request a meeting with a Member of Congress, so you want to prepare and be very clear about your ask. Regardless of whether the meeting is in the District or in Washington, the first step is to call the scheduler and explain that you want a meeting. You will be asked the purpose of the meeting, how much time you need, and the names of the people who will be coming — so you need to be prepared. You may also be asked to put the request in writing; every congressional office does things differently.

**What if the legislator is not available?** It is just as important to meet with the staff! Sometimes that is the best way to start a relationship with your Member of Congress or Senator. In the district office, ask to meet with the caseworker if you cannot set up a meeting with the legislator; in Washington ask to meet with the legislative director.

You should agree to meet with whomever the legislator’s office wants you to meet with. That’s an important foot in the door to begin the conversation.

**Preparation:** Do your homework! Go to the Member’s website and review his/her priorities. Look for points of connection — where did the Member go to school, what was his/her profession before entering Congress, did s/he play sports? As in any social situation with people you don’t know, small talk helps. You should also research the Member’s voting history.

Be sure you know whether or not the legislator and the staff are lawyers. It is a very different conversation when you have to begin with an explanation of the difference between civil and criminal law; many people without a legal background are unaware that there is no right to counsel in a civil case.

**Come prepared with data:** Have information about the clients you serve, the kinds of cases your program handles, and the eligible poverty population in the Member’s district. Focus on the issues likely to be of greatest interest to the Member, such as veterans, seniors, children, domestic violence, natural disasters, pro bono. Bring a few write-ups of client success stories with you that you can speak to knowledgeably and/or leave behind for them to read.

Even though you may be scheduled to meet for thirty minutes, you may have only ten. And that may be walking with the legislator en route to another meeting; this often happens in Washington, but may happen in the district as well if it is a busy day. So be sure you can give your elevator speech without notes, and that you have your topline information ready to go. Everything else should be backup.

**Practice:** Taking the time to prepare who is going to say what will increase your confidence and allow you to make your presentation concisely.

**Leave-behind:** Always have one to three pages to leave behind with the staff. This allows you to back up your conversation and provide more detail than the time allowed.

**Follow up:** Hopefully you were raised to write thank you notes! If not, it is time to learn. This is an opportunity to respond to any questions and issues that arose during your meeting, and thank the Members and staff for their time.

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Education in Action: Examples

It is helpful to hear what it actually looks like to educate legislators and their staff. The stories below come from LSC grantees in Ohio and Wisconsin.

Wisconsin
From Vicky Selkowe, Director of Legislative, Rulemaking, and Training Compliance, Legal Action of Wisconsin

Two years ago, as a newly hired Legislative & Compliance Director, I asked our Executive Director, "Have we regularly held meetings with Members of our Congressional delegation to educate them about what we do?" "Nope," he replied. "But we should."

Indeed, we should. Our staff are doing tremendous work helping low-income people access justice. We're providing high-quality civil legal aid to Wisconsin's veterans, survivors of violence, families with children, the elderly, people with disabilities, migrant farmworkers, and others. But we weren't telling one of our largest funders any of this. Nor were we ensuring that they knew how to send their constituents to us for assistance.

So we set out to change all of that. Wisconsin has a Congressional delegation of ten members: six Republicans and four Democrats. In 2015 and again in 2017, we're trying to meet with all of them. In 2015, the first year we had ever attempted educational meetings with our delegation, we met with seven of the 10, and five of those meetings were with the Member of Congress.

Our first meeting with a Member of Congress required considerable staff planning and time. The Member had agreed to come to our office, and we were excited and nervous. We carefully thought through which staff would attend the meeting, who would say what and in what order, what “leave behind” we would prepare to show the Representative our projects and outcomes. But less than five minutes into the meeting, as we walked the Representative through our one-pager showing our total budget, the funding we receive from LSC and from other sources, how many attorneys and offices we have, and, most importantly, our annual outcomes, our nervousness dissipated when the fiscally conservative Representative said, impressed, "Wow, you run a lean shop!" "Yes, we do," we said. "And we're proud of how we steward limited resources to ensure access to justice for so many low-income Wisconsinites."

It is not hard to get meetings with Members of Congress. Start with email requests to their district schedulers (for in-district meetings) and be flexible to accommodate the Member’s busy and unpredictable schedule. Offer to host the meeting at your office. Preparing for the meetings takes time and effort: we found that our staff benefited from considerable time prepping for these meetings, thinking through the best outcomes and client success stories to share, and reviewing LSC compliance practices to ensure that all staff understand the differences between “educating,” which we are allowed to do, and “lobbying,” which we are not. Last fall, we partnered with our state’s Access to Justice Commission to bring Voices for Civil Justice to Wisconsin to help train our staff on how to most effectively talk about our work.

These investments of time and resources have opened up numerous opportunities for better relationships and partnerships with our Congressional delegation. Congressional staff now have a clearer understanding of our services, how to best refer constituents to us, and of our limited resources and all we accomplish with our LSC funds. We continue to build upon these relationships to ensure that our delegation knows of our new programs and initiatives, and that the delegation understands the impact that LSC funding has on our ability to provide high-quality civil legal aid to their constituents across the state.

Ohio
By Colleen Cotter, Executive Director, The Legal Aid Society of Cleveland

Since 2010, The Legal Aid Society of Cleveland has made a concerted effort to educate Members of Congress who represent our service area about our work, and the value that we bring to their constituents. Our efforts have been focused on both the district office and the D.C. office. We make an annual trip to Washington with a board member and sometimes another supporter.

We meet with every member of our delegation or a member of their staff. We also meet with the district staff, prior to our D.C. visit.

This has certainly taken an investment of time, and a bit of money. However, we think that it has paid off, in that our delegation and their staff have a much better
understanding of what we do, and the value we bring to their constituents and to them. During each visit to D.C. we run into a lot of our northeast Ohio colleagues who are doing the same thing. Here are a few examples that illustrate the impact of our meetings and how our D.C. trips work in reality:

■ We have had a wide variety of experiences in our meetings. We have met in the hallway with the most junior member of the staff. We have also spent an hour with Members in their offices. And we frequently end up with something different from what we expected. We try to go in expecting anything and prepared for anything. Whomever we meet with, our goal is to make a connection.

■ We have been able to maintain contact after our visits. Several Members of Congress have visited our offices in response to our invitation. We also have received invitations to attend the Members' events in the community. Recently a Member attended a Legal Aid house party, where he observed the impact and support we have in his district.

■ We have received many follow-up calls from Congressional staff members. They call us for on-the-ground information about the impact of various laws and regulations, including client stories. For example, one Member of Congress was interested in the impact between being categorized as a contractor instead of an employee. We connected his staff with our attorneys who have expertise in employment law and tax law. They came away with information that was helpful to their work, and they got to experience the Legal Aid Society of Cleveland as experts in the work we do.

■ We have also secured four keynote speakers for our annual event as a result of the connections we have made during these visits: Supreme Court Justice Sonia Sotomayor, U.S. Representative John Lewis (GA), and Senators Sherrod Brown (OH) and Rob Portman (OH).

■ We have had the opportunity to train constituent services staff about the work that we do, and our staff has received training from constituent services staff about how they can help us in our work. We are currently planning a bigger constituent services event, organized by the staff of one Democratic Representative and one Republican Representative. They will invite the constituent services staff of our entire congressional delegation to an event to learn about Legal Aid and the services we provide.

Conclusion
As you can see, there is no one way to do this. Some grantees find it helpful to bring a member of their Board of Directors to meetings; others may include a client. Grantees who set up these meetings every year learn what works best for them.

Educating Members of Congress about civil legal aid is critical, and no one is in a better position to help increase their understanding than the folks who work with clients on a daily basis.

1 Carol A. Bergman has served at the Legal Services Corporation (LSC) since March 2012 and is responsible for managing LSC’s communications and relationships with Congress, the executive branch, the media, and the general public. Carol has been engaged in federal legislative and policy work for more than twenty-five years. She served as director of legislative affairs for drug policy in the Clinton White House, and as associate counsel for the Committee on Government Operations in the U.S. House of Representatives, under Chairman John Conyers. She has also worked for several non-governmental organizations on a wide range of domestic and international issues that disproportionately impact poor people, including HIV/AIDS, domestic violence, and criminal justice reform.

Carol has testified before the U.S. Congress, the Parliament of the United Kingdom, and several state legislatures. She is an adjunct professor at George Washington University where she has taught congressional affairs in the Department of Global Health. She has also taught at American University’s Washington College of Law where she was a resident fellow in the Program on Law and Government. She has a B.A. from Hampshire College in Amherst, MA and a J.D. from Golden Gate University School of Law in San Francisco, CA. She is licensed to practice law in Massachusetts. Carol may be reached at bergmanc@lsc.gov.

2 Vicky Selkowe is Legal Action of Wisconsin’s Director of Legislative, Rulemaking, and Training Compliance. She oversees staff compliance with LSC regulations, tracks legislation and rulemaking related to low-income Wisconsinites, and when requested, informs legislators and policymakers on the effects that legislation and regulations will have on Legal Action’s clients and their rights. Vicky has been engaged in policy advocacy and legislative work for more than twenty years in Wisconsin. A Skadden Fellow, Vicky represented low-income clients in employment, housing, and public benefits matters before going on to lead

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statewide anti-poverty policy advocacy efforts. Prior to joining Legal Action in 2014, Vicky served for nearly six years as Chief of Staff to a Wisconsin Legislator, staffing him on the legislature's budget committee. Vicky earned her Bachelor’s Degree from Beloit College and her law degree from the University of Wisconsin Law School. Vicky may be reached at vss@legalaction.org.

Colleen Cotter is the Executive Director of The Legal Aid Society of Cleveland, serving in that position since 2005. Colleen serves on the Board of Directors of the Saint Luke’s Foundation and the Cleveland Metropolitan Bar Association. She is President of the United Way of Greater Cleveland Council of Agency Executives. She is also a member of the Cleveland Marshall College of Law Visiting Committee Executive Committee and the Cleveland Rape Crisis Center Sing Out! Chorale. She was a member of the Leadership Cleveland Class of 2011 and previously served on the boards of the Ohio Legal Assistance Foundation, the Center for Community Solutions, and the National Legal Aid and Defender Association. She serves on the Legal Services Corporation Legal Needs Advisory Committee and previously served on LSC’s Data Project Advisory Committee and Pro Bono Task Force. Her 2007 speech entitled “Justice and Healthy Communities” was published in Vital Speeches of the Day. She was the 2015 recipient of Cleveland Crain’s In-House Counsel Award, non-profit category.

Colleen previously worked as a consultant to legal aid organizations and their funders. She has also worked for Indiana Legal Services and Pine Tree Legal Assistance in Maine, where she served as a Skadden Fellow. She clerked for the Honorable Cornelia Kennedy of the U.S. Court of Appeals for the Sixth Circuit. She received her JD, summa cum laude, from Indiana University School of Law- Bloomington, and her BA, cum laude, from the University of Notre Dame. Colleen may be reached at colleen.cotter@laslev.org.
Educating Legislators About Legal Aid 2.0

Brief Description:
This session is designed to build on the workshops we have done for the past few years on how to explain legal aid as constituent services to legislators and their staff. Now that many LSC grantees and other legal aid programs have begun to develop relationships with their federal and state legislators and staff, we want to identify ways to build on and expand those connections, e.g., provide trainings for district caseworkers; involve legislative staff in community outreach efforts. The panel will include LSC grantee Executive Directors and civil legal aid practitioners with experience meeting with and educating federal and state legislators and their staff. The panel will also address compliance with LSC lobbying restrictions applicable to LSC grantees in communicating with legislators.

Program Goals (what you will learn):

1. The importance of educating federal & state legislators across the political spectrum, and their staff, about legal services.

2. The nuts & bolts of scheduling meetings with legislators & staff, inviting legislators and staff to visit your program, and ensuring the meetings are as productive as possible.

3. How to build on your experience reaching out to federal and state legislators and staff to develop ongoing relationships that are mutually beneficial.

4. How to remain cognizant of LSC’s lobbying restrictions in your communications with legislators.

Topical Outline:

I. Welcome and Introductions of Panelists

II. Overview of working with federal legislators - Carol
   a. Role of congressional staff
   b. Washington vs district offices

III. Overview of work with Wisconsin congressional delegation - Vicky
    a. What has worked well and what has not succeeded
    b. Experiences reaching out to new members of Congress
    c. Experiences with members of Congress visiting grantee
    d. Recommendations

IV. Overview of work with Alaska congressional delegation -- Nikole
   a. What has worked well and what has not succeeded
   b. Washington, DC vs meeting in state
   c. Recommendations
V. Overview of work with Texas congressional delegation -- Betty
   a. Background of outreach to Texas state legislators & members of Congress
   b. What has worked well and what has not succeeded
   c. Recommendations

VI. Questions to Panelists
   a. What can grantees do to better educate legislators about civil legal aid?
   b. What changes have you seen over time in responses from members of Congress & state legislators to your program’s work?
   c. What are the issues that legislators are most interested in learning about?
   d. Do you include client stories and/or clients in visits with legislators? Do you include members of your Board of Directors?
   e. How do you decide which legislators to reach out to?
   f. How do you handle inappropriate questions, e.g., re LSC funding?
   g. After completing initial meetings with Members and staff, how do you go about building on those relationships?

VII. Q & A with audience

Speakers:

Nikole Nelson, Executive Director
Alaska Legal Services Corporation

Betty Balli Torres, Executive Director
Texas Access to Justice Foundation

Vicky Selkowe
Director of Legislative, Rulemaking & Training Compliance
Legal Action of Wisconsin

Carol Bergman, Vice President for Government Relations & Public Affairs
Legal Services Corporation

Jim Sandman, President (moderator)
Legal Services Corporation
Educating Members of Congress about Civil Legal Aid

March 8, 2017
Why Educate Legislators?

Constituent Services

• LSC grantees are a resource for legislators to refer people seeking help.

Federal Tax Dollars at Work

• Your program receives funds from LSC.
• LSC receives annual appropriations from Congress.
Meetings in Washington vs. District

• Members of Congress (MOC) travel between Washington and district offices.

• Priority – develop a relationship with the Constituent Services/Case Worker staff in your district(s).
Congressional Calendar

• Congressional Recesses: your MOC spends time in the district:
  
  • 2 weeks at Easter/Passover (April 10\textsuperscript{th}-21\textsuperscript{st})
  • 1 week at Memorial Day (May 29\textsuperscript{th})
  • 4 weeks - August
  • 1 week at Thanksgiving (Nov. 20\textsuperscript{th})
  • 2+ weeks at Christmas (Dec. 18\textsuperscript{th} - Jan.)

Where to get the calendar:
• House: https://www.majorityleader.gov/2017-calendar/
• Senate: https://www.senate.gov/legislative/2017_schedule.htm
Meeting Options

• Meet with the constituent services/case worker staff in your district(s).

• Meet with your MOC (in district or Washington DC). This usually requires a written request sent to scheduler.

• Invite your MOC or staff to visit your office (after you have a relationship with constituent services staff).
Where to Find Contact Info for Your MOC

• Find your MOC here: http://www.house.gov/representatives/find/

• Remember to search using more than one zip code to find the entire delegation of members who represent your area.

• When you identify MOC use their websites to locate phone numbers for district offices.


• lastname.senate.gov is format for Senate web addresses. Ex: http://cardin.senate.gov/ is the website for Senator Cardin.
Preparation for Congressional Meeting

• Do your homework:
  • Research your MOC’s voting history, platform, constituent pressures and background.
  • Members’ websites include their platforms on key issues and background with policy objectives.
What Is Permissible under LSC Restrictions?

• You can **educate** MOC and staff about your program, the services you provide, and clients you serve in the district.
  
  • Educating MOC is appropriate. Educating is not lobbying.

• You **can** answer questions about how much money you receive from LSC, and the impact of funding increases or cuts on your program.

• You **can** respond to congressional requests for information in writing.

• You **can** refer appropriation questions to LSC staff.
What You CANNOT Do:

LSC’s Funding

• If you are asked about LSC’s appropriation, remind MOC and staff that you are **not** permitted to discuss that due to congressional restrictions on LSC grantees.

• **Unless** in response to a **written** request from MOC.

• **Reminder**: The congressional restrictions on lobbying also apply to your Board of Directors.
Constituent Services

Funding for civil legal aid is a CRITICAL constituent service in every congressional district.

Who Qualifies for Services

• Discuss the number of people in your service area who are financially eligible.

• Discuss your work with special populations such as veterans and military families, seniors, domestic violence victims, and any other populations of special interest to the MOC.

• Number of people served last year.

• Example of compelling client story.
Proactive Steps with Media

Although you cannot lobby or engage in “grass roots” lobbying, you CAN:

• Write articles or op-eds, but not about legislation. Co-author with a person that carries weight in community (business person, clergy, judge, etc.)

• Write letters to editors – discuss impact of your work and highlight client success stories.

• Respond to media inquiries (describe your work, or consequences of funding cuts).
Good Example

Statement from Atlanta Legal Aid Society (ALAS):

• ALAS, which receives 40% of its funding from LSC, is also facing tough times ahead if LSC is eliminated. ALAS serves Atlanta's low-income families who cannot afford attorneys.

• We are one of the most efficiently operating organizations in the country and our funding requires only $1.55 per taxpayer.

• For that price, you cannot replace the type of work we do.
During the Meeting

• Expect to spend no more than 15-20 minutes in the meeting.

• Keep your comments to 3 main issue areas; be clear and concise.

• Leave behind a 1-page document about your program (try to include a client story).

• Follow-up with staff after the meeting.
LSC Congressional Meetings to Date

Total number of meetings with House & Senate staff: 55+

• House & Senate CJS Appropriations Subcommittee Staff

• House & Senate New Member Attorneys

• Targets
Congressional Briefings

• Began in House and Senate in 2014.

• Important platform to educate Members and Staff about the importance of legal aid.

• **House Briefing on Legal Aid After Natural Disasters (2017)**
  • Sponsored by Rep. David Young (R-IA-03).
  
  • Speakers included 2 grantees, a faith based organization, and American Red Cross.

  • Total of 102 attendees, 40 congressional offices.
Congressional Briefings contd.

• **House Briefing on Why Legal Aid Is Important to American Business (2016)**
  - Sponsored by Susan Brooks (R-IN) and Joe Kennedy III (D-MA).
  - Panelists included 4 GCs of Fortune 500 companies.
  - Total of 85 attendees, 40+ congressional offices.

• **Senate Briefing on Veterans (2016)**
  - Sponsored by Senators Roy Blunt (R-MO) & Patty Murray (D-WA).
  - Speakers included 2 grantees, GC of Dept. of Veterans Affairs, and veteran client.
  - Total of 30 attendees, 17 Congressional offices.
Resources

• MOC votes re LSC
• Sample Script
• Webinar Audio & Power Point
Educating Members of Congress about Civil Legal Aid

March 8, 2017
General Rules

1. You must not state any opinion about what Congress or any government actor should do or should not do (unless a specific exception applies).

2. You can explain what you do.

Meetings with Members of Congress

Materials and Leave-Behinds

1. There are no special limits on materials (i.e. written or multi-media format) for members of Congress. You can give them the same materials that you can give to anyone else.

2. Create materials that clearly and simply explain how the public can contact you and the services you offer. Make it easy for their staff to find that information and send constituents to your office.

Educational Client-Story Videos

1. Client story videos are an excellent idea.

2. Do not provide a video that has someone stating an opinion about changes in LSC funding.

   • Allowed—A video with a client saying she hopes that the grantee will be there for others like her.

   • NOT Allowed—A video with client saying she hopes LSC funding won’t be cut (unless a specific exception applies).

Responding to a Member of Congress Asking Your Opinion About LSC Funding During a Grantee-Sponsored Meeting

1. Do not provide your opinion about LSC funding:
   • unless you already have a clear written request, then you can respond in writing.
2. You should explain the restriction, but do not ask them to write a request—asking for a written request is prohibited.

3. You can describe how changes in funding affect your program.
   - When interest rates declined, we lost $100,000 of IOLTA funds and laid off one attorney.
   - LSC provides 1/3 of our budget for 2018 and fully funds four attorneys and two paralegals who together handled 460 cases last year.

4. You can include a copy of the Part 1612 restrictions with your materials.

   Example:
   Senator: You do amazing work. What do you think about the idea of cutting LSC funding?
   
   Answer: Thank you. I’m sorry, but I can’t comment on changes to LSC funding. The LSC restrictions prohibit lobbying about LSC funding. I’d be glad to give you more information about our budget and what services LSC funding currently supports, and the impact of any funding cuts on our services.

Restrictions

Do educate MOC about the restrictions on grantee services. You should emphasize the following:
   - No class action lawsuits
   - No undocumented people, except in limited circumstances like H2A, H2B, Victims of Domestic Violence, Sex Trafficking and other forms of abuse.
   - No abortion-related cases
   - No welfare reform
   - No criminal cases
   - No lobbying or grassroots lobbying
What is Permissible on Social Media (Facebook, Twitter, Instagram etc.)

Grantee Accounts

1. Grantee accounts must not include any prohibited lobbying or political activities.

2. Ask yourself if you could take the same action in a printed newsletter or a sign in front of your office.

Members of Congress Accounts

1. NOT allowed—following or liking a campaign page (e.g. “Pat for Re-election 2018”)

2. Okay—Following or liking the member’s House or Senate office main page (not individual items or posts) (e.g., “Pat Smith—U.S. Senate—Official”)

3. Reposting, sharing, or liking individual items will depend on the content.
   - Okay—Reposting an item about an LSC TIG award in the district with no mention of future LSC funding.
   - NOT Allowed—Reposting an item about an LSC TIG award that says LSC funding should not be cut next year.

Private Accounts

1. Staff must not use grantee resources or work time for their personal lobbying.

2. Staff cannot use work time for personal lobbying.
   - During work, staff cannot check, post to, or otherwise use social media for expressing lobbying opinions. That rule applies to using your own smartphones or other devices as well.

   - Staff cannot at any time use work-provided smartphones or other devices to express lobbying opinion. Even on vacation, you cannot use your work laptop for posting lobbying opinions.
Staff Must Not Identify a Grantee with Staff’s Personal Lobbying Activities.

1. You can keep separate from your grantee work personal social-media accounts that you use for sharing personal information and opinions.

2. You can keep your personal account separate from work even if you list the grantee as your employer in your general profile along with other information about yourself like your town, your college, and your past employers, etc.

3. NONETHELESS, you must ensure that you are maintaining separation of your personal lobbying opinions from the listing of your employment.
   - A staff person has a Facebook account on which she shares photos of her family, updates about her travel, personal thoughts, and occasionally her opinions about candidates for Congress. She doesn’t discuss her work or her grantee employer. Her profile page lists her college, and her prior jobs. She can include on her profile page her current grantee employer.

   - A staff person has a Facebook account that is dedicated to keeping federal funding for legal aid. All of his posts are about that issue or closely related issues. He would need to contact LSC for a fact-specific review and advice before listing on that site his employment with the grantee.

**Personal Lobbying by Grantee Staff**

1. Staff must not use grantee resources or work time for their personal lobbying.

2. Staff must not identify the grantee with their personal lobbying activities.

3. Usually, personal lobbying does not raise concerns if you do not mention your work for a grantee.
   - A staff person who speaks publicly as part of her grantee job must be extra careful because she has created a public expectation that she speaks for the grantee.
   - A staff person who does not normally speak publicly for the grantee can lobby in his personal capacity without identifying the grantee, even if some people he talks to already know that he works for the grantee.
4. Identifying a grantee as your employer or describing yourself as a “legal aid lawyer” could raise concerns depending on the context. LSC will provide further guidance on those situations.

**Grantee Board Members Contacting Members of Congress**

1. Board members must not use grantee resources for their personal lobbying.

2. Board members must not identify the grantee with their personal lobbying activities.
   - Board members who also contact members of Congress as part of their grantee work must be extra careful because members of congress are used to hearing from them as representatives of the grantee.
   - A board member who does not normally contact members of Congress for the grantee can lobby members of Congress in her personal capacity without identifying the grantee, even if the members know that she also serves on the grantee’s board.

3. Former board members are not subject to the restrictions, unless they are still involved with the grantee in another capacity.
   - A former board member can discuss her past experiences with the grantee as part of her personal lobbying, but she must not identify the grantee with her actions. She should make very clear that she is no longer with the grantee in any capacity and that the grantee did not ask her to engage in lobbying.

**Other Topics**

**Supporters Who Want to Explain the Importance of LSC Funding**

1. Grantees must NOT ask anyone else to lobby for LSC funding—that is prohibited grassroots lobbying.

2. Supporters can share with members of Congress their experiences with the grantee, or information about grantee services.
Sub-grants

1. The lobbying restriction applies to the activities of an entity receiving a subgrant of LSC funds (and often to the sub-grantee’s non-LSC funds). Some exceptions apply for Part 1614 PAI subgrants.

2. Sub-grants of non-LSC funds do not apply the lobbying restriction to the subgrantee, unless the primary grantee applies the subgrant to its Part 1614 PAI requirement. Please see the revised 45 C.F.R. Part 1627 (effective April 1).

Reporting Violations

If you see something that might violate LSC restrictions, then you should report it.
  • You can always contact the LSC OIG or other LSC staff.
  • You can also use the grantee’s own procedures for investigating and resolving compliance concerns.
  • Grantee management must report violations to LSC in some situations.