

Federal Agency Meeting Etiquette

- **Arrive early** – Arrive at agency meetings early so there is time to go through security. For larger groups, more time may be needed to go through security. A safe time to arrive is 30 minutes before the meeting.
- **Not elected officials** – Federal agency officials and staff are not elected and usually do not have ties to specific communities or constituencies. Be sure to concentrate on the specific policy issues and how they directly affect or would affect your credit union.
- **Show appreciation** – Be sure to thank agency officials and staff for their support of credit unions. Also, it is good to send a thank you email to the staff for spending their time to discuss credit union issues. This also allows staff to have credit union contact information in their emails and makes it easier to have follow-up communications.
- **Take turns speaking** – Identify a point person for each topic to speak on behalf of the group. This approach shows the group stands together on issues. Also, while your state league may have coordinated the meeting, the agencies want to hear from credit unions directly. Be sure to share real life stories of how the agency’s regulations affect credit union operations.
- **It’s OK to disagree sometimes** – It is ok to disagree with agency staff and officials. The job is to educate them and provide them with the credit union perspective.
- **Exchange business cards** – Exchange business cards with all officials and staff. If you do not have a card, ask for their card and be sure to email your contact information afterwards.
- **Provide leave-behinds** – If possible, provide leave-behinds or any handouts with background information about the credit unions attending the meetings.
- **If possible, provide any follow-up information** – Ask the agencies if they have any questions that you can address. This allows you to follow up with information, reinforce your positions, and maintain contact with the agencies.
- **Follow up and let CUNA know how the meeting went** – Follow up with CUNA staff with any outstanding issues that need attention or to communicate any information/intelligence from the meeting.