



LEAD Regional: State-Level Advocacy Guidance for Regional Branded Merchandise Associations *(formerly known as the “LEAD Local Playbook”)*

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Introduction

Each year, PPAI hosts a [Legislative Education and Action Day](#) (LEAD) event in Washington. This is an important opportunity for members to take the branded merchandise industry's concerns to the halls of Congress and build relationships with legislators and key staffers on Capitol Hill.

While PPAI focuses its advocacy efforts at the federal level, it's also important that regional associations and individual members keep an eye out for legislation and regulation at the state level. Advocacy with your state legislators can also build important relationships and awareness of the impact of promo on local, state and larger economies.

In your own backyard, you may encounter challenges such as different taxation rules across local jurisdictions or regulations like PFAS restrictions or [extended producer responsibility laws](#). Regional associations lead the charge in monitoring these state and local issues and advocating for the interests of the promo businesses they represent.

This document provides a framework for state-level advocacy, from phone calls by individual members to a group state capitol visit organized by your regional association. If you have any questions, please contact Rachel Zoch, PPAI's public affairs manager, at rachelz@ppai.org.



Getting Started

The most important step of any advocacy effort is to *determine your “why.”* The most successful advocacy efforts center on a clear story or message that includes a specific request for action. (Visit [PPAI Media](#) and search “LEAD [year]” for PPAI’s current legislative priorities at the federal level.)

Once you have decided on your focus, there are multiple ways to organize regional association members to advocate for the interests of the industry. This document details five strategies:

- Call campaigns (virtual phone banking).
- Letters (emails).
- Individual member visits to legislative offices.
- Invite lawmakers and their staff to promo factory/facility tours or regional association events.
- Organized member visit to legislative offices as a group at the state capitol.



Virtual Phone Banking

One of the simplest ways to advocate is calling or emailing legislative offices. This can be done as an invitation to members to call at a time that's convenient for them (virtual phone bank) or as a coordinated in-person group effort added to a larger association event.

Here are the five steps to executing a successful phone bank/call campaign:

- Identify the issue to be addressed.
- Choose a day/week for association members to make calls.
- Create a short call script for association members to use.
- Send an invitation to members to make calls.
 - Provide the target date(s), your script, and instructions on how to look up contact info for their state legislators.
- Ask members to report back to you on who they called and whether they spoke with a staffer or left a voicemail.

Providing a script is the most important element of a successful phone banking effort. Having the words ready to go makes it easy for volunteers to feel confident picking up the phone and speaking up for the industry. Below is a sample script that can be easily customized for the issue or proposed legislation your association wants to address:

1. Sample State Legislator Call Script

Hello,

My name is [your name], and I live in [city, zip code] and work at [company name] in [city, zip code]. I am calling to [support/oppose] [name of bill]. [Briefly state how this bill would affect your company/job/livelihood.]

OPTIONAL: I would like to know what Representative [last name] is doing to [support/oppose] this bill, and I would be happy to provide more information on this and other issues and challenges the branded merchandise industry is facing.

Thank you for your time.



Issue-Based Letters

Letters/emails are another tool to help amplify your message to lawmakers and highlight your regional association's efforts on your members' behalf. These can be a standalone campaign or in conjunction with a phone banking event or in-person meeting with a legislative office, and they provide a great way to facilitate remote participation from more members across your region.

As with phone banking, it's important to provide a ready-to-use message so your members feel confident advocating for the industry. Be sure to include estimated industry statistics (available on PPAI's [By The Numbers](#) page) to help educate lawmakers on the scope of our industry – both revenue and number of constituents – in the state.

Below is a sample letter that can be easily customized for the issue or proposed legislation your association wants to address:

1. Sample Issue Letter/Email

Dear [Representative/Senator] [last name],

I am writing as a member of the [regional association name], an organization representing the branded merchandise industry, which supports an estimated [number of jobs] in [state] and contributes roughly [revenue] to the state's economy each year. Many of the companies in our industry are small, family-owned businesses that provide good wages and promote local economic growth.

I am writing to [support/oppose] [name of bill], which would have a [positive/negative] effect on our industry. [Briefly state how this bill would affect your company/job/livelihood.]

Branded promotional products are highly effective marketing and communication tools, not just trinkets or giveaways. We are a vital sector of the U.S. economy and core component of every brand strategy – from large corporations to government entities to professional sports teams and more – and branded items like apparel, drinkware, and more can be found in every American household.

I and [regional association name] would be happy to provide more information on this and other issues and challenges the branded merchandise industry is facing. Thank you for your time and consideration.

Sincerely,
[full name, job title]
[company name]
[city]



In-Person Meetings and Facility Tours

When it comes to building relationships, there's no substitute for in-person interactions. Regional associations can organize an outreach program encouraging members to request a meeting with state legislators at their local offices, or better yet, invite lawmakers to a regional association event or local manufacturing or decorating facilities for a tour and photo opportunity. (See the sample meeting request letters at the end of this section on pages 8 and 9.)

To make sure these aren't just photo ops, however, it's important to prepare your members with a clear message, information about the impact of the promo industry in your state, and promo samples or gifts that meet the appropriate ethical standards:

1. What's Your Message?

Again, the most important step is to *determine why you want to meet* with your legislators. The most successful advocacy efforts center on a clear story or message that includes a specific request for action by the legislator. Look at what's happening in your state with taxes and labor laws or regulations for chemical restrictions (like PFAS) or [extended producer responsibility laws](#).

Even without specific issues or legislation to address, meetings with state officials can lay a critical foundation for future challenges. Establishing and maintaining relationships with policymakers is important so that when a threat does arise, legislators are receptive to (and hopefully even asking for) your opinions.

2. Know Your Numbers

Lead with the scope and economic impact of the branded merchandise industry in your state. If there is no looming legislative threat to the industry or your business, focus on educating lawmakers on how many jobs, how many small businesses, how much revenue, etc. our industry contributes to your state (and the effectiveness of the medium).

Estimated state-level industry statistics and case studies can be found on PPAI's [By The Numbers](#) page. This is important information to share in any meeting with lawmakers, but in the absence of a specific issue or bill to address, this is the most compelling information you can share.

If you do have a specific issue or bill to address, be sure you are prepared to share:

- Specifics on how the issue is affecting the industry/your business.
- Potential adverse effects if the issue is not addressed/the bill passes and is signed into law.
- The name and number of the bill (if applicable).



3. Gift Limits

No promo industry advocacy would be complete without sharing actual promo products – but it's important to *be aware of and comply with ethics rules* and gift restrictions, which apply to staff as well as elected officials. You can find your state's gift limits on the [National Conference of State Legislatures gift restrictions page](#).

In some cases, it can be important to call these items "samples" instead of "gifts" due to various legislative offices' policies for receiving any items of value. Some offices will not accept any items, and that should not be perceived as a slight.

4. Be Sure to Follow Up

These visits are meant to build relationships, so *follow-up is critical*. If you manage to schedule a factory visit or office meeting with your legislator(s), be sure to take photos and post one with your thanks on your website and social media accounts. Also share the photo and your appreciation directly with the legislator's office via email, along with any additional information they may have requested during the visit. A written thank-you note sent by mail is also recommended.



Meeting Request Letter Templates

Customize the sample letters below to request meetings or invite elected officials to facility tours or special events like the opening of a new facility or a regional association event. Keep in mind that event fees/tickets are considered gifts, so it's best to stick to free events or those with a ticket price under \$20.

1. Sample Meeting Request

Dear [NAME],

I am a constituent, and I have been a resident of [city] for the past [number] years. I live and work in [state] at [company name]. I would like to set up a meeting with [Representative/Senator] [last name] at [his/her] convenience to discuss issues and challenges the branded merchandise industry is facing.

[Include more information about your company, including a description of the products manufactured or distributed and the number of employees. Also include a note about your regional association and the number of members and jobs it represents.]

Please let me know what appointments are available. You can reach me at [phone] or [email]. Again, thank you, and I look forward to meeting with you soon.

Sincerely,
[full name, job title]
[company]
[city]



2. Sample Facility Tour Invitation

Hello, [NAME]:

I am a representative of [regional association], and I am delighted to invite [Senator/Representative] [last name] to tour the [company] facilities in [city] on [your preferred date / specify the date of a special event].

There are roughly [number] branded merchandise companies in [state], generating about [\$revenue] in annual revenues and employing [number] people. Overall, 98% of the companies in the branded merchandise industry in the U.S. are considered to be small businesses.

Numerous studies have shown that branded promotional products have a unique appeal to human memory and are the most effective form of advertising to prompt action across all generations. Adding a message to a tangible product converts an ordinary communication into a marketing experience that engages all five of the recipient's senses.

We would love to host [Senator/Representative NAME] and members of [his/her] staff on [date]. Please let me know whether [Senator/Representative NAME] is interested in meeting constituents at the [company] facilities in [city] and I will confirm with additional details, including the time and address.

Thank you for your consideration.

Sincerely,
[full name, job title]
[company]
[city]



LEAD Regional: Organizing a Group Visit to Your State Capitol

Regional associations can organize a state-level “LEAD Regional” lobby day modeled after PPAI’s annual trip to Washington. Traditionally, volunteers travel to the state capital and hold meetings with state legislative offices, but other options include inviting legislators to a reserved space in the capitol building or to regional events or workplaces.

Getting Started

1. What’s Your Message?

As always, the most important step is to *determine why you want to meet* with your legislators. The most successful advocacy efforts center on a clear story or message that includes a specific request for action by the legislator.

Know your numbers: *focus on the scope and economic impact of the branded merchandise industry in your state* – i.e., how many jobs, how many small businesses, how much revenue, etc. – and the effectiveness of the medium, especially if there is no legislative threat to the industry in your state. (Estimated state-level industry statistics and case studies can be found on PPAI’s [By The Numbers](#) page.)

If you do have a specific issue or bill to address, be sure you are prepared to share:

- Specifics on how the issue is affecting the industry/your business.
- Potential adverse effects if the issue is not addressed/the bill passes and is signed into law.
- The name and number of the bill (if applicable).

Even without specific issues or legislation to address, establishing and maintaining relationships with policymakers can lay a critical foundation for future challenges so that when a threat does arise, lawmakers are receptive to (and hopefully even asking for) your opinions.

2. What’s Your Method?

Another important step is to *decide which type of event* your regional organization wants to host. The two most common options (described in more detail below) are:

- In-person meetings at state capitol offices.
- Catered event at/near the state capitol.

3. When Is Your Event?

Next, *check the calendar* to determine the best date and time for your event. Determine first when it is feasible to do your event, then work backward to figure out when you need to start planning. Regardless of the method you choose, executing a LEAD Regional event will take months of preparation, and [checking your state’s legislative session calendar](#) is an essential step. You don’t want volunteers traveling to an empty state capitol building for in-person meetings, and you don’t want to invite your legislator to an event in your district (if your district is not near the capital)



when the legislature is in session, unless you prefer having a specific staffer from the district attend your event.

Event Descriptions

1. Traditional Office Visits to Meet with Legislators

If you pick the traditional in-person option, you should begin working at least four months prior to your event's date. Four months out is a good point to identify which volunteers will participate in the event. Two important decisions to be made here are deciding how many meetings you want to have and determining who will be responsible for setting those meetings.

Legislative bodies vary in size, which also means volunteer group sizes for a LEAD Regional event may vary, but three to six people typically comprise a sufficient group for a successful state-level lobby day. How many volunteers you may need will be based on the number of meetings you intend to have, but a good rule of thumb is that each group of two to four members can handle six meetings in a day.

You will want to consider reaching out to more prospective volunteers than you believe will accept, and a good approach for this is sending an letter inviting your regional members to participate. There are two templates provided in the appendix at the end of this document:

- Use Template 1 if you plan for association staff to make the appointments (page 17).
- Use Template 2 if you intend to have your volunteers (members) make their own appointments (page 18).

During your initial outreach to volunteers, it's also helpful to provide a tentative event schedule (template on page 19).

a. Choosing Target Legislators

The next step is to determine which state legislators you want to target for meetings. The list should include members of committees that hold jurisdiction over issues that affect the promo industry. The specific committee names vary among states, but some of the most often-used examples of relevant committee names include but are not limited to:

- | | |
|------------------------|------------------|
| • Commerce | • Small Business |
| • Labor | • Finance |
| • Economic Development | • Ways & Means |

Similar to your volunteer outreach, the target meeting list should include more legislators than you actually want to meet with because you are unlikely to get all the meetings you request. Expect 30%-40% positive return on meeting requests – this means that at best, you should plan on getting less than half of the meetings you request.



Aside from targeting legislators based on committee memberships, also plan to request meetings from legislators who represent districts where your volunteers live or work. Meeting requests from a constituent in the legislator's district often have a higher probability of success. (You can find your state legislature's website [here](#) or on PPAI's [By The Numbers](#) page.)

b. Scheduling Meetings

Once you have created your target list of legislators, it's time to begin reaching out to schedule the meetings. You should start this outreach as soon as possible prior to the event - at least two months out. Send a follow-up request every other week for the first month, then once a week beginning one month prior to your event.

It's important to personalize this outreach and focus the message for your specific audience. (See pages 19-21 in the appendix at the end of this document for meeting request letter templates.)

c. Preparing Your Volunteers

One month out from your lobby day is a good time to *determine where to meet with your volunteer group* in the morning before your event begins. There are often coffee shops or cafes within state legislative buildings that are conducive for small groups to gather.

This is also an appropriate time to *consider any product samples* you want to provide during your meetings. In some cases, it can be important to call these items "samples" instead of "gifts" due to various legislative offices' policies for receiving any items of value. Some offices will not accept any items, and that should not be perceived as a slight.

You should also familiarize yourself with your state's gift restrictions. For a list of various states' gift limits, visit the National Conference of State Legislatures [gift restrictions page](#).

One week before the event, you should check in with all the legislative offices where you have *confirmed* meetings. One week out is also a good time to host a preparatory call with your volunteers to review talking points and event logistics.

The morning of the event, you should meet in your designated place within the capitol building prior to the first confirmed meeting. This is where you can distribute any product samples and leave-behind materials to volunteers. Also remind volunteers to take pictures whenever it is appropriate, especially with legislators and staffers.

The day after your event, send a note to volunteers thanking them and reminding them how important it is to follow up with the offices they visited. Encourage them to send follow-up notes to thank the legislative offices for meeting with them and reiterate a couple key talking points. Also send thank-you notes on behalf of your regional association to the legislative offices.



2. Hosting a Catered Event

Another way to approach a LEAD Regional event involves securing a room in your state's capitol building and hosting a catered breakfast or lunch to bring legislators and their staffers to your volunteers for the relevant policy conversations. This method can also be combined with the traditional approach. For example, you could host a catered breakfast, then have meetings with select legislative offices later the same day.

NOTE: Many state capitals require a member of the state legislature or an employee of a state administrative agency to sponsor room reservations in state facilities. Specific information on this can be found on your state's capitol building website.

a. Secure Event Space

If you decide to host a catered event, the best next step after checking legislative session dates is to confirm whether you will need a sponsor to reserve the room in the capitol building. An association member who has a relationship with a legislative office is a good place to start with this request. Also consider having your members send requests to the state legislators who represent districts where their homes or workplaces are located.

If there is a form that needs to be completed by the legislative office for the space reservation request, include that form via PDF or hyperlink in your outreach to legislators. There may be a down payment required for the reservation, and in some cases, that payment is refundable under certain conditions. Check your state's guidelines on the use of space within the capitol building to determine applicable specifics for your event.

b. Enlist Members to Invite Legislators

Once you gather a group of volunteers to attend your event, they should be enlisted to contact legislators, including their own, with invitations to your catered breakfast or lunch. Other emails should also be sent inviting the entire legislative body to your event. Again, you can expect a less-than-half return rate for meeting invitations, so if you want 30 offices to attend your catered event, you should consider inviting 60.

After your initial round of communication has been sent to legislators, periodic follow-ups are strongly advised. These follow-ups should occur via email and phone calls. Another useful reminder of your event includes door hangers and flyers that can be dropped off at invited legislators' offices the day before your event.



c. Prepare a Presentation on Promo

This method of approaching a LEAD Regional event presents the opportunity to have one or more designated speakers deliver brief presentations during the catered breakfast or lunch. It's important to stress that the presentation must be short and will focus on your talking points (e.g., pressing issues or challenges, plus industry scope/impact and similar topics).

Speakers can include the regional executive director, the regional board's legislative director, if you have one, or any other engaged members who are attending your event. Limit the presentation to two or three speakers, each with a maximum of five minutes to deliver their message.

d. Don't Forget to Follow Up

Remember to send follow-up notes to thank the legislative offices for meeting with your members, and encourage members to send their own thank-yous. It's a good opportunity to reiterate some of your key talking points and build important relationships with those offices.



3. BONUS: Member Letters in Support of Your Visit

Regardless of the event format you choose, emailed letters from members who aren't able to attend will be helpful to amplify your volunteers' message to legislators and highlight your regional association's efforts on your members' behalf. Customize the template below to provide members who may not be able to attend with a letter to facilitate their remote participation.

Sample LEAD Regional Event Member Support Letter:

Hello, [NAME]:

We Need Your Support This Week

Your industry colleagues in [state] are once again taking our message directly to [state capital] to ensure lawmakers recognize our [state revenue number] industry employs [state employee count]. By taking our message directly to the legislature through in-person meetings, we will address the lasting power of branded merchandise, as well as [list any other state-specific issues here].

Please add your voice to ours. We are asking you to call or email your member of the state legislature and voice support of the same issues we will address during our meetings. By sending emails and making phone calls, you will be helping to amplify the voices of your colleagues who are having important meetings with policymakers.

It's easy to participate.

- Click the link below to send a prewritten, editable email or call your state legislator.
- Forward our email to your team members and encourage them to participate as well.

Thank you for your support of this important program.

"Take Action Now" button with hyperlink to prewritten letter:

Dear [NAME],

[Regional association] is taking our industry's message to [state capital] this week with our Legislative Education and Action Day, highlighting the power of branded merchandise and the value these products create in our state.

- Branded merchandise and promotional products are logoed or imprinted items that educate, recruit, highlight safety awareness, urge organ donations, and encourage healthy lifestyle choices.



- These products also recognize and reward employee achievements while inspiring action. Our industry's products are used to celebrate milestones, sign legislation, and reinforce critical messages.

There are [number of promo companies] branded merchandise companies in [state], generating [state revenue number] in annual revenues and employing [state employee count]. The majority of the companies in the branded merchandise industry are considered to be small businesses.

Numerous studies have shown that branded promotional products have a unique appeal to human memory and are the most effective form of advertising to prompt action across all generations. Adding a message to a tangible product converts an ordinary communication into a marketing experience that engages all five of the recipient's senses.

Please keep the unique needs and interests of the branded merchandise industry in mind when considering legislation that impacts the success of our industry, for example [state policy priority].

Sincerely,
[signature]

LEAD Regional Summary

In summary, LEAD Regional events are similar to the event in our nation's capital, just on a smaller scale. The motivations are the same - and there may be a specific priority or even an urgency caused by proposed legislation. The most important goal, besides influencing policy, is to establish lasting connections with policymakers in your state. These connections will prove useful when potentially impactful legislation arises.



APPENDIX: Helpful Letter Templates

MEMBER INVITATION TEMPLATE A (association makes appointments)

Hello, [NAME]:

I am pleased to say that [regional association] is organizing a state-level Legislative Education and Action Day – aka LEAD Regional – in [state capital] on [date]. I ask that you join me to meet with legislators during this one-day event.

LEAD Regional [city] Date: [date]

Join with us on [date] to lobby [state] state officials about the power and impact of branded merchandise, and the significance of our industry. Similar to PPAI's annual Legislative Education and Action Day in Washington, we will be delivering this message along with stories of your businesses and the industry's strengths, challenges and priorities.

What [regional association] will provide:

- All appointment setting for targeted meetings.
- Leave-behind materials communicating the economic impact of the industry.
- Briefing information provided one week prior to the event.
- Day-of briefing prior to meetings.
- Lunch on [date] at [time].

I will be more than happy to make all the necessary appointments with your state officials. All you need to do is be ready to meet with legislators on [date].

What's next?

First, I need to know if you are with us! Please let me know no later than [deadline] if you will join me in [state capital city] on [date].

I have attached a draft agenda for the event itself. This is subject to change, but it will give you an idea of how the day will work.

I am very excited to begin this new journey for the industry in [state]. I look forward to hearing from you and hope to see you at the capital.

Sincerely,

[full name, job title]

[regional association]



MEMBER INVITATION TEMPLATE B (members make appointments)

Hello, [NAME]:

I am pleased to say that [regional association] is organizing a state-level Legislative Education and Action Day – aka LEAD Regional – in [state capital] on [date]. I ask that you join me to meet with legislators during this one-day event.

LEAD Regional [city] Date: [date]

Join with us on [date] to lobby [state] state officials about the power and impact of branded merchandise, and the significance of our industry. Similar to PPAI's annual Legislative Education and Action Day in Washington, we will be delivering this message along with stories of your businesses and the industry's strengths, challenges and priorities.

What [your regional association] will provide:

- Leave-behind materials communicating the economic impact of the industry.
- Briefing information provided one week prior to the event.
- Day-of briefing prior to meetings.
- Lunch on [date] at [time].

NOTE: You will need to make the appointments with your legislators for this event.

What's next?

First, I need to know if you are with us! **Please let me know no later than [deadline] if you will join me in [state capital city] on [date].**

I have attached a draft agenda for the event itself. This is subject to change, but it will give you an idea of how the day will work.

I am very excited to begin this new journey for the industry in [state]. I look forward to hearing from you and hope to see you at the capital.

Sincerely,

[full name, job title]

[regional association]



EVENT SCHEDULE TEMPLATE

LEAD Regional Schedule Template

(Event Date)

8:30-9:15 a.m.	LEAD Regional briefing (specify a meeting location in the Capitol Building)
9:30-11:30 a.m.	Meetings with legislators (various offices, Capitol Building)
11:30 a.m.-12:30 p.m.	Lunch (specify location)
1 p.m.-4:30 p.m.	Meetings with legislators (various offices, Capitol Building)

LEGISLATOR MEETING REQUEST LETTER TEMPLATE A (association makes appointments)

Greetings,

I am a representative of [regional association], and I am sending this request on behalf of [volunteer name], who is a constituent of [legislator's name]. [Volunteer name] would like to request a meeting with the [senator/representative] in [his/her] capacity as a member of the [committee name]. (optional)

As part of our association's legislative outreach, we are meeting with members of the [state legislative body name] on [date] to discuss our industry's presence in the state. The branded merchandise industry supports approximately [number] jobs in [state] and generates more than [\$revenue] annually. [Volunteer name] would like to discuss these statistics and speak about [his/her] business with the [representative/senator] or a member of [his/her] staff.

Please let me know when we could meet with your office on [date].

Thank you for your consideration.

Sincerely,

[full name, job title]

[regional association]



LEGISLATOR MEETING REQUEST LETTER TEMPLATE B (members make appointments)

Greetings,

My name is [name], and I am [job title] at [company] and a member of [regional association]. I am a constituent of [legislator's name] and would like to request a meeting with the [senator/representative] in [his/her] capacity as a member of the [committee name]. (optional)

As part of our association's legislative outreach, we are meeting with members of the [state legislative body name] on [date] to discuss our industry's presence in the state. The branded merchandise industry supports approximately [number] jobs in [state] and generates more than [\$revenue] annually. I would like to discuss the scope of our industry in our state and challenges facing our businesses with the [representative/senator] or a member of [his/her] staff.

Please let me know when we could meet with your office on [date].

Thank you for your consideration.

Sincerely,
[full name, job title]
[company]
[city]



TEMPLATE OF LETTER INVITING A LEGISLATOR TO A MEMBER FACILITY

Hello, [NAME]:

My name is [name], and I am [job title] at [company] and a member of [regional association]. I am delighted to invite [legislator's name] to tour the [company] facilities in [city] on [date].

There are roughly [number] branded merchandise companies in [state], generating about [\$revenue] in annual revenues and employing [number] people. Overall, 98% of the companies in the branded merchandise industry in the U.S. are considered to be small businesses.

Numerous studies have shown that branded promotional products have a unique appeal to human memory and are the most effective form of advertising to prompt action across all generations. Adding a message to a tangible product converts an ordinary communication into a marketing experience that engages all five of the recipient's senses.

We would love to host [Senator/Representative NAME] and members of [his/her] staff on [date]. Please let me know whether [Senator/Representative NAME] is interested in meeting constituents at the [company] facilities in [city] and I will confirm with additional details, including the time and address.

Thank you for your consideration.

Sincerely,
[full name, job title]
[company]
[city]