



**National Trust for
Historic Preservation®**
Save the past. Enrich the future.



Arranging a Congressional Site Visit

Visiting an HTC project provides legislators with the unique opportunity to see first-hand how this federal incentive 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; how the historic character of the building is preserved; and the proposed benefits of legislation. 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 or HTC legislation.
- **Define the event type to showcase your selected HTC project** – Offering a tour during construction or after a property is placed in service is a great way to highlight the value of the program. For events that require significant planning or financial commitment, like a grand opening reception, ensure the event will still be a success even if the legislator cancels.
- **Create a planning team** - Involve partners such as developers, state and local preservation and Main Street organizations, and local leaders 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 the event** - Congressional in-district work periods are set at the beginning of each year. Be prepared to be flexible on dates 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 template below) and customize 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 the Congressional office within 5-7 days acknowledging receipt of the request, follow up via e-mail and phone. Develop a rapport with the scheduler by being patient, kind, and persistent. Continue to gently and respectfully follow up, checking in every 7-10 days. If one Congressional in-district work period is not possible, 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. After the staff tour, 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 goal of becoming a resource on revitalization and 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 the financing of the project, impact on the neighborhood, details about the Historic Tax Credit Growth and Opportunity Act, 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 National Trust and the Historic Tax Credit Coalition have created PDF packages for all states that include a state map, a list of HTC projects from 2002-2024, and a fact sheet on the HTC-GO legislation. Other helpful handouts could include a document describing the history of the building and its contribution to the community, and an explanation of how the financing gap is filled by the HTC. Before and after photos are always impactful.
- **Gauge media interest** - Determine if your member of Congress would prefer a behind-the-scenes tour or something that will generate news and media attention from local outlets. If media coverage is requested and possible, offer to share the advocacy materials with the office in advance. Regardless of the attendance of local news outlets, plan to take photos of the visit to share on social media channels.
- **Maintain communication** – As you confirm final details up to 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 the possibility of a Member’s late arrival.
- **Activate your pitch** - During the visit, ask your legislator to support improvements to the HTC. Specifically ask your Member to consider co-sponsoring the Historic Tax Credit Growth and Opportunity Act (H.R. 2941/S. 1459) and if they will vocalize support of these provisions in moving tax legislation. If they express interest, encourage them to help advocate for the HTC with colleagues who serve on the House Ways and Means and Committee and the Senate Finance Committee by emphasizing its value.
- **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 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 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.
- **Share your advocacy** – Show your gratitude for the visit and thank the Member for learning about and considering your request by posting photos through social media channels and newsletters. Tag the Member of Congress in the post and thank them for a great visit.

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: Office Scheduler email address

CC: Other Key Office Staff (like tax staff) email addresses

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/active historic redevelopment of Project Name, in City/town, during an upcoming congressional recess in (insert Month). The project was completed/is projected to be completed in Month and Year and is using federal Historic Tax Credits (HTCs), which were/are essential for this project. We would like to showcase the details of this transformative project, share the current challenges and discuss needed improvements to the HTC as outlined in the Historic Tax Credit Growth and Opportunity Act (H.R. 2941/S. 1459).

Insert 2-4 sentences on the HTC project(s) here (history, new use, brief challenges)

The federal HTC is a critical tool that brings investment into local historic rehabilitation project(s) and at the same time adapts and preserves these previously vacant or underutilized historic structures into a new 21st Century use. However, this incentive has lost significant value over the last 10 years because of IRS guidance and federal policy changes.

We would look forward to showing this federal incentive in action and discussing ways to modernize the HTC which will bring more value to the credit, increase the number of smaller and non-profit projects and make the credit easier to use.

Please let us know whether Rep/Sen XXX is available to see the project during an upcoming recess, and we would be delighted to follow up with you to make the necessary arrangements. Please do not hesitate to contact me directly.

Sincerely,

Your name/organization

Phone number