Advocacy Guide

Government Affairs 101: Why Advocacy Matters to All Professionals
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Jewish Advocacy? What and Why?

Advocacy is exactly what it sounds like – trying to convince someone (in this case, elected officials) to support a position that you support. Advocacy at its best is not just about knowing your position, but effectively conveying that to the person whose support you are seeking. Ultimately, advocacy is the result of thoughtful strategies, carefully considered actions, and proposed solutions that will help to influence decision-making in government that positively impacts the lives of individuals and communities.

Advocacy in this regard is an essentially Jewish ideal. It is part of fulfilling the mitzvoth of tzedakah (justice) and tikkun olam (repairing the world). It is about working with others in our systems of government (local, state/provincial, and national) to create opportunities to advance issues of import to the communities in which we live and elsewhere in the world.

This is not just about politics; this is about real policies that can impact how far our charitable dollars go, influence how much people give, and even increase or decrease the demands for our help. Our elected officials need to hear from us -- the voters in their cities, ridings, districts, provinces, and states. The fact is that laws, regulations and policies affect our work in our communities. We need to be part of making sure those laws, regulations and policies support our work.

Advocacy can:

- Inform lawmakers of the needs and perspectives of their constituents;
- Change community attitudes and misconceptions on public policy issues that impact them;
- Assist individuals and agencies with gaining access to resources, funding and information;
- Ensure that you and those whom you represent have a voice in policy decisions made at all levels of government;
- Build relationships that strengthen the ability of your community to impact public policy.

As Jewish professionals in our local Federations and in the continental Federation system, we have an essential role in advocating on public policy issues of importance to our communities, Federations, their partner agencies and the people whom they serve, and ultimately the broader Jewish community.

The goal of this Advocacy Guide is to make you more comfortable with advocacy and empower you to engage in this vital work, even if it makes you uncomfortable. We all have a responsibility to be strong advocates for our communities, and we each possess the power to take on that role. As a constituent and voter, you already possess more power than you imagine. Working together with members of your home communities and the continental Federation system, you become part of a tremendous force. This Advocacy Guide will help you to feel prepared, energized and ready to engage in this critical work.

To be the most effective advocate, and therefore have the best chance to effect positive change, it is important to prepare. The best advocates know their issue and their audience. This includes knowing the arguments both for and against your position to properly make your case. It also
includes consideration of the philosophical beliefs and public positions of the elected official to whom you are advocating. You do not have to be an expert on an issue to be an effective advocate, but as a constituent, community leader and voter, you have the power to influence your elected officials by expressing where you and your peers stand on an issue. Taking the time to plan provides you the ability to make a real difference.

JFNA’s Washington office, your local Federation, Community Relations Council, and the leaders of the missions are all part of a cooperative team to gather information on these important issues. You do not need to reinvent the wheel each time or feel pressured to read everything on every issue. Our offices offer not only news briefs, but also offer opportunities to get more involved. Whether you are looking for more information, or hoping to join one of the national initiatives, please don’t hesitate to reach out. Simply increasing the number of people in an advocacy meeting can be a contribution in itself and hopefully introduce you to other young professional advocates.

This Advocacy Guide, along with guidance from government affairs professionals at your Federation and Community Relations Councils and from the staff of JFNA’s Washington office, which works to ensure that the voice of the Jewish Federations is a prominent force in health and human service policy decisions on Capitol Hill and with the Administration, can help to ensure your message is effective and has an impact on how your elected officials vote and craft policy. For a list of the public policy issues the JFNA Washington office works on, please visit http://www.jewishfederations.org/localIncludes/downloads/66701.pdf.

The tools contained in this Advocacy Guide, while focused on advocacy to the United States Congress, can be applied to all levels of government, both in the United States and Canada.

If you have any questions about this Advocacy Guide or would like to speak with a member of the JFNA Washington staff, please contact David Feinman, Senior Legislative Associate at david.feinman@jewishfederations.org or (202) 736-5887. If you need assistance with any state/provincial or local advocacy, including tailoring these tools to your particular situation, you should contact your local Federation office.

Advocacy is deeply connected to Jewish values. We hope we can continue to grow and learn together about all these different parts of our work. Together, we are a powerful force. We are eager to continue this work with all of you.
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Understanding the Legislative Process – United States

Understanding the legislative process is an important aspect of being an effective advocate. Your approach to an elected official will vary depending on where a bill is in the legislative process. Here is a simplified step-by-step of how a bill becomes a law in the United States Congress (don’t worry if you don’t fully understand it; that’s why we have staff in Washington!) and what advocacy at that stage may look like:

**Introduction and Committee Referral**
After a bill is introduced in the House or Senate, it is referred to a committee of jurisdiction (examples: a House bill relating to Foreign Aid to Israel will be referred to the House Committee on Appropriations; a Senate bill relating to Medicaid will be referred to the Senate Health, Education, Labor and Pensions Committee).

- **Potential approach**: please introduce a bill that does x, y, z.

**Committee Hearing**
Once assigned to a committee, the bill may be referred to a subcommittee or considered by the whole committee. In either case, if enough members of the subcommittee or committee wish to consider the bill, a hearing will be held to invite witnesses to testify for/against the bill.

- **Potential approach**: please attend this critical hearing to hear from these witnesses.

**Mark Up Session**
Following a hearing, the subcommittee or committee may meet again to “mark up” or amend the bill before voting on the final version as amended. If a subcommittee votes to pass the bill, it is “reported out” to the full committee.

- **Potential approach**: please introduce an amendment that does x, y and z.

**Reporting a Bill**
After receiving the subcommittee’s report, the full committee often conducts further study and hearings, and then votes on whether to report it out to the full chamber. Following an affirmative vote, staff prepares a written report of the bill, containing the scope of the legislation, impact on existing laws, the position of the executive branch, and views of any dissenting Members.

- **Potential approach**: please vote to report (or not report) this bill out of committee.

**Floor Action**
After a bill is reported back to its original chamber, it is placed on the calendar and debated on the floor. Equal time for debate for both proponents and opponents is assigned by the Rules Committee. Amendments to the legislation may be offered if the Rules Committee permits.

- **Potential approach**: please submit a Statement for the Record supporting (or not) this bill.

**Voting**
After debate and approval of any amendments, the bill is either passed or defeated.

- **Potential approach**: please vote in favor of (or against) this bill.
Referral to Other Chamber
Once a bill is passed by one chamber (House or Senate), it is referred to the other chamber, where it follows a similar course of action as indicated above.

➢ **Potential approach:** please urge your colleagues in the House/Senate to support (or not) this bill.

Conference Committee
If both chambers pass the bill, but if one or the other passes a version different than the other, a conference committee is formed to negotiate a compromise between the two bills, referred to as the “conference report.” Both chambers must then approve the conference report by a floor vote.

➢ **Potential approach:** please urge the Conference Committee to pass (or deny) this bill.

Final Action
After the bill has been approved by both chambers, the bill is sent to the President, where it is either signed into law or vetoed.

➢ **Potential approach:** thank your elected officials for supporting the bill now signed into law, or express your concern about the new law.
Understanding the Legislative Process – Canada

Understanding the legislative process is an important aspect of being an effective advocate. Your approach to an elected official will vary depending on where a bill is in the legislative process. All bills must go through the same stages of the legislative process, but they do not necessarily follow the same route. Here is a simplified step-by-step, following the most common route of how a bill becomes a law in Canada:

Notice of Motion for Leave to Introduce and Placement on Order Paper in House of Commons
Introduction of any public bill requires 48 hours written notice. Once notice is given to the Clerk of the House, the title of the bill is placed on the Notice Paper for the next sitting of the House. The day after, the title will appear in the Order Paper for introduction, where it remains until the bill is introduced. Once introduced, motions to consider the bill may be presented.

Introduction and First Reading
Once the notice period has passed, the Member or Minister seeks leave to introduce the bill when the item “Introduction of Government Bills” or “Introduction of Private Members’ Bills” is called during Routine Proceedings.

Second Reading and Reference to Committee
This stage gives Members an opportunity to debate the general scope of the bill. Unless a bill has been referred to a committee prior to the second reading, debate at this stage focuses on the principle of the bill.

Consideration in Committee
Most bills are referred to the standing committee whose mandate most closely corresponds to the bill’s subject matter. The role of the committee is to review the text of the bill and approve or modify it. Witnesses may be invited to present their views and answer members’ questions. Once the witnesses have been heard, the committee studies the bill clause-by-clause. Members may propose amendments to the bill. Once all the parts of the bill have been considered and adopted, with or without amendment, the committee votes on the bill as a whole. Once the bill is adopted, the Chair asks the committee for leave to report the bill to the House.

Report Stage
Following consideration in committee, members, particularly those who were not members of the committee, may, at this stage, propose motions to amend the text of the bill. When deliberations at report stage are concluded, a motion is put forward to approve the bill (with any amendments). There is no debate at report stage unless amendments are proposed. A bill that has been reported by a Committee of the Whole, with or without amendment, must be put to a vote immediately at report stage and may proceed to third reading the same day.

Third Reading (and Passage)
Debate at this stage of the legislative process focuses on the final form of the bill. The amendments that are admissible at this stage are similar to those at second reading stage. Amendments for a three-or six-month hoist, as well as reasoned amendments are permitted. An amendment to recommit the bill to a committee with instructions to reconsider certain clauses is also acceptable. Third reading and passage of a bill are moved in the same motion. Once the motion for third
reading has been adopted, the Clerk of the House certifies that the bill has passed. The bill is then sent to the Senate with a message requesting that it consider the bill.

**Consideration and Passage by Senate**

The Senate follows a legislative process that is very similar to the one in the House of Commons. In cases where the Senate adopts a Commons bill without amendment, a message is sent to the House of Commons to inform it that the bill has been passed and Royal Assent is normally granted shortly thereafter.

Since most government bills originate in the House of Commons, the Government sometimes requests that the Senate consider a bill as quickly as possible. The *Rules of the Senate of Canada* provide for a procedure known as pre-study whereby the subject matter of a bill that has been introduced in the House of Commons, but has not yet been sent to the Senate, is sent to a Senate standing committee. In this way, the Senate can consider the bill and form its opinion even before it receives the bill from the House of Commons. When the bill is received, the Senate is then in a position to adopt or amend it within a very short time.

**Passage of Senate Amendments by the Commons**

The Senate often makes amendments to bills. If the House does not agree with the Senate amendments, it adopts a motion stating the reasons for its disagreement, which it communicates in a message to the Senate. If the Senate wishes the amendments to stand nonetheless, it sends a message back to the House, which then accepts or rejects the proposed changes. If an agreement cannot be reached by exchanging messages, the House that has possession of the bill may ask that a conference be held, although this practice has fallen into disuse.

**Royal Assent and Coming into Force**

Royal Assent is the stage that a bill must complete before officially becoming an Act of Parliament. A bill will not be given Royal Assent unless it has gone through all of the stages of the legislative process and been passed by both Houses in identical form. Royal Assent may be granted in one of two ways—through a written procedure and through the traditional ceremony, where Members of the House of Commons join with their Senate colleagues in the Senate Chamber.

The written procedure involves the Clerk of the Parliaments (the Clerk of the Senate), or his or her Deputy, meeting with the Governor General, or his or her Deputy, to present the bills with a letter indicating that they have been passed by both Houses and requesting that the bills be assented to. An Act that has been given Royal Assent in written form is considered assented to on the day on which the two Houses of Parliament have been notified of the declaration.

The traditional procedure for Royal Assent involves a formal ceremony that takes place in the Senate Chamber. When the House is sitting it suspends its proceedings in order that its Members may proceed to the Senate Chamber, where the Governor General or his or her Deputy grants Royal Assent.
Once a bill has been granted Royal Assent, it becomes law and comes into force either on that date or at a date provided for within the Act or specified by an order of the Governor in Council.

**Ways to Engage with Your Elected Officials**

Often, JFNA Washington will send alerts about particular issues or pieces of legislation that are under consideration in the U.S. Congress. On many occasions, draft scripts, letters or petitions will be provided that you can use as a blueprint for contacting your legislators. In addition, as a citizen and constituent, you have the right to contact your legislators on any issue at any time. This communication can be facilitated through a number of ways, including:

- E-mail through their website
- Write a letter to their Washington, DC office
- Call their local or Washington, DC offices
- Attend a town hall meeting in the district/state
- Arrange a meeting in their district/state offices
- Arrange a meeting in their Washington, DC office

While JFNA Washington does not monitor legislative action in Ottawa or send out alerts to advocate on Canadian legislative issues, the same forms of communication can be used to engage with Members of Parliament, either in their office in Ottawa or their riding offices.

**Writing Your Elected Officials (E-mail or Letter)**

It is most effective to send letters to the elected officials from your state/province and your district/riding, rather than the other Members of Congress or Parliament. You are their constituent and they will appear on your ballot during the next election. These facts alone carry significant weight.

**Mailing Information**

To locate the mailing address or e-mail contact page for your elected officials, visit these links:

- U.S. Senate - [http://www.senate.gov/general/contact_information/senators_cfm.cfm](http://www.senate.gov/general/contact_information/senators_cfm.cfm)

**Address**

Begin your letter, whether being sent by postal mail or e-mail, by addressing them as follows:

**U.S. House of Representatives**

- The Honorable (full name)
  (Room #) (Name) House Office Building
  Washington, DC 20515
Dear Representative [last name]:

**U.S. Senate**
- The Honorable [full name]
  (Room #) [Name] Senate Office Building
  Washington, DC 20510

Dear Senator [last name]:

**Canada House of Commons**
- Name of Member of Parliament
  House of Commons
  Ottawa, Ontario
  Canada
  K1A 0A6

Dear Member of Parliament [last name]:

**Senate of Canada**
- Name of senator
  The Senate of Canada
  Ottawa, Ontario
  Canada
  K1A 0A4

Dear Senator [last name]:

**Body**
Your letter should address a single topic or issue. If it is being sent by postal mail, it should be typed. Either way, it should be one page, three paragraphs, with the following structure:

- Start the letter by saying who you are and why you are writing. Clearly state the purpose of your letter. If you have "credentials" that make you an authority on the issue, list them.
- Provide specific detail about how the issue affects you, your organization, and your community. Be factual, not emotional. The best letters are courteous, to the point, and professionally written. If a certain bill is involved in your issue, cite the correct bill whenever possible (see below on how to cite legislation).

**Closing**
Close your letter by requesting the action you want taken, whether it is a vote for or against a bill or a change in policy, and thank them for taking the time to read and respond to your letter.

**Signature**
Sign the letter, whether hand-written or digitally, with your name, full mailing address, phone number and e-mail address.
Identifying Legislation

If you are going to cite legislation in your letter, make sure you know the bill number, name, and the basic purpose of the legislation. In the United States, you should use Congress.gov to search for this information if you do not have it from your local Federation of JFNA's Washington Office. In Canada, you should use LEGISInfo. When citing the bill in your letter or e-mail, cite it as follows:

**United States**
- House Bill: "H.R._____
- House Resolution: "H.RES._____
- House Joint Resolution: "H.J.RES._____
- Senate Bill: "S._____
- Senate Resolution: "S.RES._____
- Senate Joint Resolution: "S.J.RES._____

**Canada**
- House of Commons Bill: "C-_____
- Senate Bill: "S-_____

Calling Your Elected Officials

If you are a voting constituent, your opinions are important to your elected officials. Phone calls are an excellent way to register your opinion quickly to ensure your voice is heard.

- **Phone Numbers** – to locate phone number for your elected officials, visit these links:
  - U.S. Senate - [http://www.senate.gov/general/contact_information/senators_cfm.cfm](http://www.senate.gov/general/contact_information/senators_cfm.cfm)

- When you call your elected official, a receptionist or member of their staff will answer the phone. Identify yourself as a constituent and tell the staff member you would like to leave a message regarding a particular bill or issue.
- Have the bill number ready so that your opinion can be registered accurately.
- Your message can be as simple as "I urge the Senator to vote for the Iran Sanctions Act, S. 123."
- All communications are tallied by staff. Depending on who you are calling you may be asked for your name and address or simply for your zip or postal code.
Attending a Town Hall Meeting

Attending a town hall meeting is a unique opportunity to share your concerns directly with your elected official and hear the concerns of other members of your community. Do not underestimate the power of raising a question at a public meeting and getting the views of your elected official on the record. Here are some tips to ensure you maximize this opportunity:

Be Prepared
Have thoughtful, well-researched and well-rehearsed arguments supported with good data and persuasive stories.

Tell a Personal Story
Think in advance of how a policy might affect you, your organization, or your community or someone in it (specific examples are very helpful). Whether your elected official supports your position or not, tell them your story. Personalizing an issue carries a lot of weight and helps get your point across.

Numbers
Numbers are easy to remember and are meaningful to politicians who are trying to gauge how an issue impacts their constituency. Saying things such as “my organization serves 500 people” or “there are 500 people in my community that think just like me” will have an impact.

Be Respectful
Starting any conversation with another person in a rude manner is no way to persuade them. Elected officials want to hear your views; you do not need to badger them to get your message through. Remember also that you are a representative of the Jewish Community and our principles. Treating everyone with respect is important as an example to others as well as sharing your story and opinions.

Go in Groups
Bringing a large group with you who share your views on the issues you plan to discuss multiplies the impact of your message.

Talk to Staff
Elected officials bring members of their staff to town hall meetings. Try to identify them and talk to them before the meeting, get their business card, and tell them your story.

Leave Paper
Leave background memos or talking points so that staff at the town hall can review this with their boss and send the information to Washington or Ottawa to the staff member who covers your issue.

Follow Up
Politely persistent people persuade politicians. Elected officials are very busy and often are unable to respond to everyone, but those who follow up with a phone call after attending a town hall meeting are much more likely to receive a response.
Attend Multiple Meetings
When an elected official gets the same question in two or three meetings, they are much more likely to think (and tell their staff) “we’d better look into that.” Hearing the same thing in different places signals to a politician there may be a deeper problem afoot than they thought at first blush.

Setting Up Meetings
The following tips will help you to arrange and hold successful meetings with your elected officials either in Washington, DC/Ottawa or in their district/riding/state/provincial offices:

Before the Meeting
Find your Elected Officials
Visit these websites to find the names and contact information for your elected officials:

- **U.S. House** ([http://www.house.gov](http://www.house.gov)): enter your zip code on the top right to locate the name and phone number of your representative.
- **U.S. Senate** ([http://www.senate.gov](http://www.senate.gov)): select your state from the “Find Your Senators” dropdown menu on the top right to find the names and phone numbers of your two senators.
- **Canadian House of Commons and Senate**: ([http://www.parl.gc.ca/SenatorsMembers.aspx?Language=E](http://www.parl.gc.ca/SenatorsMembers.aspx?Language=E)): select your state or enter your postal code to locate information about your MPs and senators.

Schedule meetings in advance
Scheduling your meeting as far in advance as possible helps to ensure availability of the elected official or their relevant staff and gives you time to prepare. Contact the elected official’s Scheduler or Executive Assistant and request a thirty minute meeting with the elected official or their relevant staff.

Disclosure
Be upfront with the office about the purpose of the meeting and nature of the discussion. This allows them to assign the right staff member for your meeting.

Be prepared
Familiarize yourself (and your group, if you are with a group) with the issue of focus for the meeting, possible questions for the elected official or staff, and the order of speakers during the meeting. Research the elected official’s position on the issue, their voting record, and public statements made on the issue so you can shape issues in a way that they will be most likely to agree (remember, to most effectively advocate, it is important to craft a message to their way of thinking). It is also helpful to know what committees your elected official serves on and if they are in a leadership position within their party/chamber. Helpful resources include:

- **United States**
  - **Congress.gov** ([http://congress.gov](http://congress.gov)) – provides legislative information from the Library of Congress. Use this website to track the progress of a bill, the voting record of your elected official, and the daily deliberations of the Congress.

Senate Votes (http://www.senate.gov/) – provides detail on the proceedings of the Senate, vote schedules, and recently-introduced legislation.

Canada

LEGISInfo (http://www.parl.gc.ca/LEGISINFO/) – a research tool for finding information on legislation before Canadian Parliament. This tool provides electronic access to a wide range of information about each bill, such as details on the passage of the bill through the Senate and House of Commons; the text of the bill as introduced at First Reading and its most recent version if it is amended during the legislative process; votes; major speeches at second reading; coming into force data; legislative summaries from the Parliamentary Information and Research Service of the Library of Parliament; and government press releases and backgraders (for government bills).

Plan your meeting

Appoint someone to lead your meeting. This person will be responsible for opening the discussion and thanking the elected official for their time (and support, if appropriate). Also determine prior to the meeting whom will speak and what they will say. Be on time.

During the Meeting

Who you meet with

Although you will request appointments with your elected official, you may end up meeting with staff instead. Elected officials rely heavily on their staff to manage the expanse of legislative issues they face and to help determine how to vote on key issues, including those of interest to the Jewish community. Developing relationships with staff will go a long way in strengthening your ability to communicate effectively with your elected officials.

Introduction

Open the meeting with introductions. Thank the elected official or staff for their past support (if appropriate) and thank them for taking the time to meet with you. Make a brief statement about the issue of focus and let this lead into a brief discussion on the issue.

Limit your agenda

Avoid focusing on more than the core one or two issues for which you arranged the meeting. Keep in mind elected officials and staff members only have a short amount of time to meet. Stick to the agenda even if the elected official veers off course. Politely bring the discussion back to the topic(s).

Clear Summary/Make It Local

Give a brief summary of your position on the issue, including how the issue affects your community/their constituents. Use numbers and real life examples wherever possible to convey real effects.

Answering Questions

If the elected official or their staff asks you a question you cannot answer, be honest that you do not know the answer. Offer to find out the information and make sure to follow up. This is an important opening for continuing dialogue.
Specific Ask
Ask for a specific action, like sponsoring or voting for a bill, so that they leave the meeting with a clear understanding of what you are seeking.

Take “no” for an answer
If your elected official or their staff expresses they are unable to support your position, do not argue. If compromise cannot be met, be gracious for the meeting, as it is possible that you will solicit their support for a different issue in the future.

Use your allies
Inform the elected official or staff of other groups working towards your goal, strengthening your case and potentially their ability to justify support for your position.

Business cards
Get the names of any staff present and be sure to thank them for their time. Ask for their business cards so that you can contact them in the future.

After the Meeting

Long-term relationships
Maintain contact and a positive rapport, which will help you to schedule future meetings and support for other issues. Send a letter thanking the elected official and their staff for the meeting, reiterating your goals and any commitments made during the meeting. As other issues come up on which your elected official supports a position or vote, send a note to the elected official and their staff thanking them for their support, even if you did not advocate on that particular issue.

Follow Up With Local Federation
Contact your local Federation professional or Community Relations Council Director responsible for working with the elected official to let them know about the meeting, what was said, and any commitments made. If the elected official did not support your position, let the local Federation professional know so that they can try to follow up as appropriate as well.

Follow Up With JFNA Washington Office
For meetings held with members of the U.S. House and Senate, contact the JFNA Washington Office to let them know about the meeting, what was said, and any commitments made. If the elected official did not support your position, let the local Federation professional know so that they can try to follow up as appropriate as well.
JFNA’s Washington Office

JFNA’s Washington Office promotes the interests and concerns of all 153 Jewish Federations and 300 independent communities with Members of Congress and the White House, working to ensure that the voice of the Jewish federations is a prominent force in policy decisions impacting the work of the Federation system, including International Relations (specifically related to Israel) and health and human services.

Our Public Policy Priorities
Our Washington office advocates on issues of concern to the Jewish federations, including:

- Safeguarding our nation’s fiscal health while protecting the most vulnerable
- Protecting Medicaid, Medicare, and the social safety net
- Maximizing incentives for charitable giving and supporting interests of nonprofits
- Promoting the international interests of the Jewish federations
- Safeguarding the Jewish community from terrorism and extremism
- Securing federal funding for critical community programs
- Advocating for and with persons with disabilities
- Speaking out for children and families
- Sustaining community services to work to alleviate poverty
- Coordinating rapid and effective disaster and emergency relief
- Assisting immigrants and refugees
- Protesting the delegitimization of Israel
- Meeting the needs of Holocaust Survivors and empowering older adults to live healthier, more independent, & more engaged lives

For more details on these issues, please visit http://www.jewishfederations.org/local_includes/downloads/66701.pdf

JFNA Washington Key Legislative Staff
William Daroff, Senior Vice President for Public Policy – william.daroff@jewishfederations.org
David Feinman, Senior Legislative Associate – david.feinman@jewishfederations.org
Robert Goldberg, Senior Director, Legislative Affairs – robert.goldberg@jewishfederations.org
Stephan Kline, Associate Vice President, Public Policy – stephan.kline@jewishfederations.org
Shelley Rood, Senior Legislative Associate – shelley.rood@jewishfederations.org
Jonathan Westin, Health Policy Director – jonathan.westin@jewishfederations.org
Steven Woolf, Senior Tax Policy Counsel – steven.woolf@jewishfederations.org
Additional Resources
Israel Action Network – http://www.israelactionnetwork.org
Jewish Council for Public Affairs (JCPA) – http://www.jewishpublicaffairs.org
JFNA’s Washington Office – http://www.jewishfederations.org/washington
United States Senate – http://www.senate.gov

Works Cited