This document is a workbook for the USDN Federal Funding Workshop:
Unlocking Congressional Earmarks - Turning Congressional Funds into Community Gold

Webinar slides:
https://drive.google.com/file/d/1Kf1JXR7s4uLxhgBWG5n5BRirwYttG1HT/view?usp=sharing

Download a copy of this workbook for yourself to do the activities below

To determine which breakout room to join, please answer the following question (to determine readiness)
❓Are you planning to pursue Congressional Earmarks in 2025 and do you have ready most of the following information? (YES/NO)

- A project or portion of project that will cost $5million or below, that is not already being funded by another source,
- (if a construction project) Secured project permits, and design is funded or underway,
- (if necessary) Have a project match secured or at least a letter of support in hand from your elected officials about this funding being prioritized in your local budget,
- Community buy-in and support. This is a community driven project, that has community support, and you have identified collaborators who (ideally) you have a history of working with successfully.

If YES, join the Breakout Room A to learn how to create an effective pitch to your Congressional representatives.
If NO, **join Breakout Room B** to learn how to assess your project eligibility and steps you can take before meeting with Congressional staff.

Activity - How to Advocate for Your Local Needs to Secure Funding (20 Min)

Breakout Room A - Develop your Pitch

Melissa will provide guidance on completing each task and you can start developing content for your pitch to Congressional staff that you can workshop with your team. Identify where you may need to collect more information to complete these tasks. **These are solo tasks**, but feel free to let Melissa know where you need guidance and have questions to learn from each other.

👥**TASK 1 (3 min)**: Identify the correct Congressional member(s) where the project will be placed. Identify your internal staff and community partners who need to be part of the initial conversation with your Congressional representative.

🏗️**TASK 2 (10 min)**: Pick one project which you can provide most of the information required in the Congressionally Directed Spending Request Template. Fill out this template at a later time with your team. It's a great resource to help you understand the type of information to submit to your Congressional representative.

Your current task is to answer the following questions about your project to help develop your pitch for your initial conversation with the Congressional staff. You may not be able to answer every question right now. That's okay! Try to answer as many as you can and continue to answer them with your project team. When developing your pitch, consider using the Project Framework as a structure. How to develop a Project Framework is explained in the USDN Seeking Federal Funding: A Guide for Local Governments, starting on page 21.

- What are you requesting?
- Why is this project necessary?
- How do you propose to do the work? Who will do the work?
- How have you ensured that this project is community driven?
- What are the estimated costs?
- Where will this project be located?
- How does it fit the Congressional member's priorities?

⏰**TASK 3 (3 min)**: Create a time bound plan to complete the steps below.

- Fill out the request template - For FY 2026, to be completed by: (no later than January 17, 2025)
- Set up an initial conversation with your Congressional Representative - To be completed by: (no later than January 31, 2025)
- Submit your request through your State's portal by their deadline - To be completed by the deadline specified by your Congressional member

Breakout Room B - Assess Project Eligibility & Get Ready to Meet with Congressional Staff

Cynthia and Dotty will discuss where to find details about past Earmarks projects funded by your Congressional member, the project eligibility assessment that your team needs to perform, and conversations that need to occur prior to pursuing Congressional Earmarks. **These are solo tasks**, but feel free to let Cynthia or Dotty know where you need guidance and have questions to learn from each other.

🌐**TASK 1 (3 min)**: Find the website of your Congressional staff to see examples of Earmark projects funded in your member's district. On your member's website, search on keyword "appropriations" or see if there is an item in a drop-down menu or submenu (likely titled Services) indicating "appropriations requests" or Community Project Funding if for the U.S. House, Congressionally Directed Spending if for the U.S. Senate.

- Dotty will provide a brief demo of Senator Brian Schatz's (Hawaii) website for Congressional Earmark projects.

🏗️**TASK 2 (10 min)**: When you submit your Earmark request, you will provide the following detailed information. **Your current task is to assess among your multiple project ideas, which ones are most eligible for Congressional Earmarks**. Use the following Go/No Go assessment for each of your project ideas. Any areas identified as a NO GO will need to be addressed prior to applying for Congressional Earmark funding.

QUESTIONS	YES/NO	CONSIDERATIONS	GO / NO GO
Does the community being served by this project give their support? Is this a community driven project?		Your project will be most competitive if it is supported by and being led in partnership with the community.	If NO, this funding opportunity is likely a NO GO
Have you identified a diverse project team? Do you have a history of working with them successfully?		Your project team should be made up of organizations (This may include community organizations, universities, places of worship, etc.) and individuals who have the expertise to complete the project and have experience working with the community being served. These partners will need to demonstrate historic success completing similar work, and the team will need to demonstrate examples of working successfully together in the past.	If NO, this funding opportunity is likely a NO GO
Do you need the Congressional Earmark funding within a year?		Congressional Earmark funding is dependent on Congress acting on the annual appropriations bills. You should not apply if you need the funding within a year.	If YES, this funding opportunity is likely a NO GO
Is your Congressional member supportive of projects like yours?		Look at their previously funded projects or related policy statements (news releases, committee or floor statements) to determine if they seem interested in your project type.	If NO, this funding opportunity is likely a NO GO
Do you anticipate that your project or portion of a project will cost $5million or less?		$5million tends to be the ceiling for an Earmark request. Some projects have been funded at higher amounts and it isn't typical.	If NO, this funding opportunity is a NO GO
Will you be pursuing other funding opportunities to complete the project or portion of the project?		You cannot apply for Congressional Earmark funding for projects or portions of projects that are already funded.	If YES, this funding opportunity is likely a NO GO
How far along are you in your project timeline? Is your project moving toward 60-90% design? Have you secured your environmental and construction permits?		Your project will be most competitive for Congressional Earmark funding if design is near completion and you have secured or are in the process of securing your permits.	If NO, this funding opportunity is likely a NO GO
Do you have support from your elected officials to pursue this project? Is there funding prioritized in your local budget to complete this project?		Depending on the funding source, you may need to provide a match for the Congressional Earmark. Funding match isn't always required, but if necessary, you will need a letter of support from your elected officials.	If NO, this funding opportunity is likely a NO GO

👥**TASK 3 (3 min)**: Identify the next 2 conversations that you need to have following this workshop. Create a time bound plan to complete the steps below.

It will be crucial to develop relationships with your local External Affairs or Intergovernmental Affairs staff. These staff are likely the ones registered to lobby for your jurisdiction. Meet with them to learn about their process for making requests to Congressional staff. If allowable, the next step will be to start developing relationships with your Congressional staff directly.

- Meet with your local External Affairs or Intergovernmental Affairs staff - To be completed by:
- (If allowable) set up a meeting to get to know your Congressional staff - To be completed by: