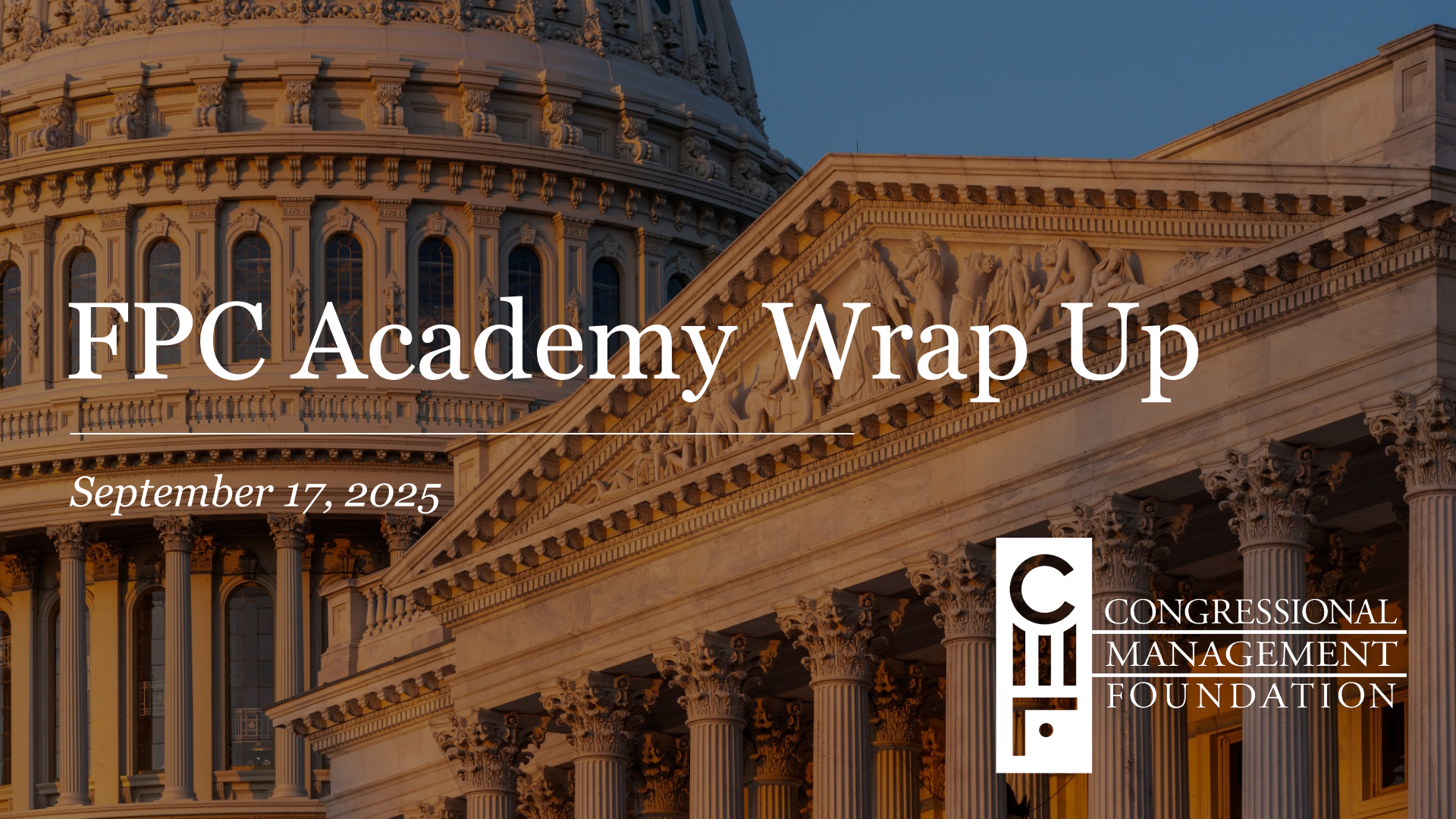




FPC Academy Wrap Up

September 17, 2025



CONGRESSIONAL
MANAGEMENT
FOUNDATION

Session Agenda



- Welcome
- Upcoming Policy Issues
 - Evan Liddiard & Matt Stross
- Review of FPC Academy Highlights
 - Jordan Davis
- FPC Office Hours Recap & Look Ahead
 - Liz Smith
- Final Notes from CMF
 - Jen Daulby
- Final Thoughts from NAR



FPC Academy Wrap Up

Upcoming Policy Issues



NAR Federal Political Coordinators

Upcoming Tax Policy Issues

Evan Liddiard
Matt Stross

NAR's Post-OBBA Tax Priorities

Tax Provisions to Increase Supply of Homes:

- **More Homes on the Market Act**
 - Would double cap gains exclusions (to \$500K/\$1m) and index for future inflation
- **Revitalizing Downtowns and Main Streets Act**
 - Tax credit for converting older CRE to residential units
- **Neighborhood Homes Investment Act**
 - Tax incentives to build/renovate single homes in distressed neighborhoods
- **Capital gains incentives for investors who sell rental homes to first-time buyers**
 - Move first-time buyers to top of the list of bidders on starter homes

New Studies on Cap Gains Exclusion

Rosen Consulting Group

Locked-in Households: The Effects of Outdated Capital Gains Exclusions on Homeowners and Housing Inventory

- Estimates that 13m (15%) US homes have potential unrealized gains above thresholds (89% of those who bought before 1990 potentially locked in)
- 90% of all potentially locked-in households have lived in home for at least 20 years
- By 2030, 14.4m homes will be potentially locked in
- By 2040, 15.7m homes will be potentially locked in
- State-by-state estimates and projections

Prof. Andrew Hanson

The Decline of the Capital Gains Tax Exclusion for Housing

- Estimates that 29m (34%) US homes have potential unrealized gains above thresholds (8m/10% over \$500K)
- Finds substantial variation among states & districts
- Older homeowners have dramatically larger potential tax liability from home sale
- By 2030, 20m homeowners (23%) could exceed \$500K limit and by 2035, 32m (38%) could
- State-by-state and district-by-district projections

Other Highlights – Rosen Report

- Over 9 million (32%) owner households aged 65+ were potentially locked in as of 2023, but only 7% of households under 65
- Almost 65% of owner households who have been in home for 35+ years were potentially locked in as of 2023, but less than 5% of those in home for 10 or fewer years
- Potentially locked-in households projected to increase by 10% (1.3m) by 2030 and 21% (2.7m) by 2040
- Fastest growing percentage states for projected locked-in households between 2023-2040 include: TN, OH, NC, IN, MI, UT, NH, NE, SC, MO
- Fastest growing in # of households in states between 2023-2040 include: TX, FL, NC, TN, GA, AZ, SC, IN, MI, OH

Other Highlights - Hanson Study

	<u>U.S. Ave % Homes >\$500K</u>	<u>U.S. Ave Equity >\$500K</u>
2024	10% (1 state over 40%)	\$189K
65 & over	10%	\$227K
2030	23% (8 states over 40%)	\$238K
65 & over	21%	\$281K
2035	38% (20 states over 40%)	\$339K
65 & over	31%	\$384K

A Tale Of Three Congressional Districts

Equity > 500K

	<u>2024</u>	<u>2030</u>	<u>2035</u>
• CA 19 (Panetta D)	79K 46%	137K 79%	162K 94%
• UT 1 (Moore R)	24K 12%	67K 32%	125K 60%
• MO 8 (Smith R)	-0- 0%	323 0.1%	893 0.4%

Questions?



Academy In Review



Building a foundation for long-term, effective advocacy

Over the past 9 months, we've focused on equipping you with the knowledge, tools, and support needed to advocate effectively:

6 webinars focused on core advocacy skills, the Hill landscape, and communication strategies

2 in-person sessions that allowed for deeper dives and hands-on practice

Virtual office hours providing additional interaction, guidance, and support



Connecting the Dots with Policymakers

- Importance of Researching Policymakers
- Connecting the Dots Between You, Your Issue, & Policymakers
- Connecting the Dots in Your Network

Example Elements of a Legislator Profile

Legislative

- District Dynamics
- Political Party
- Committees
- Leadership
- Champion Issues
- Voting History
- Sponsor/Cosponsor

Relational

- Key Staff
- Friends
- Family
- Caucus Membership
- Legislative “Buddies”

Personal

- Previous Profession
- College
- Clubs/Groups/Civic Orgs
- Interests/Hobbies

Connecting the Dots



What to do Before, During, and After Hill Meetings

- Understanding the Hill Meeting Landscape
- Preparing for your Meeting
- Tips for Productive Meetings
- The Importance of Following Up

Making Your Pitch During the Meeting

Tell a Story: Facts are important, but connecting your issue to real people or specific situations can make it more relatable and compelling. Personal stories or case studies can leave a lasting impact.

Keep It Concise: Congressional meetings are typically short. Be succinct and prioritize the most important points. Respect the limited time to ensure the meeting stays focused and productive.

Don't Forget to Make Your Ask: Don't assume the Member or staffer will know exactly what you're asking for. Be clear and specific about the action you hope they will take.



It's all in the Approach

Be Professional and Respectful: Whether you agree or disagree with the Member's stance, maintain professionalism and a respectful tone. Building a relationship is often as important as achieving your immediate goal.

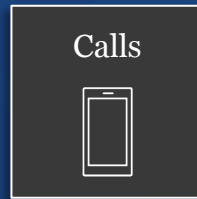
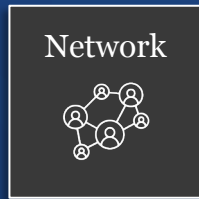
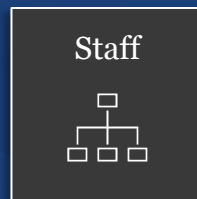
Express Gratitude: Always thank the Member or staff for their time and consideration. Building goodwill can help with future interactions.



Strategies to Influence Undecided Lawmakers

- Engaging Undecided Lawmakers
 - Digging Deeper
 - Tailoring Our Approach
 - Understand that Advocacy is an Ongoing Process
- Overcoming Roadblocks
 - Stay Positive
 - Stay Nimble
 - Stay Solutions Oriented
- Advocacy Strategies as a System

Considering Advocacy Strategies as a System



Considering Advocacy Strategies as a System



- Together, this system creates a “surround sound” effect, which can be impactful with undecided lawmakers.
- With in-person, constituent-focused meetings as the core of the effort, other tactics help amplify and reinforce the message – but only if used thoughtfully and strategically, not just as noise for noise’s sake.

Bringing It All Together – In Person!

- Discussed the Capitol Hill Landscape
- Reviewed Best Practices
- Tips for Advocating in Groups
- Interactive Roleplaying





Advocating in a Group

Play together as a Team!

- Agree upon the strategy and approach for EACH meeting – it may be different depending on the office
- Determine roles and play your position (Captain, Storyteller, Facts & Data, Subject Matter Expert)
- Pass the ball and make adjustments! Don't repeat what's already been said. Not everyone has to speak. Ask yourself, "Will my participation add or subtract value?"
- Debrief ASAP on your next steps and decide who will do follow up

Interactive Roleplaying



In-District Advocacy

- The Value of In-District Advocacy
- Determining the Best Way to Engage
- Tips for Successful Engagement



Benefits and Challenges of In-District Advocacy

Benefits

- More time with a policymaker; they have less pressures on their schedule than in DC
- Less logistics for members of your organization
- More people can attend a meeting or event than in cramped DC offices
- Site visits or hands-on programming can be a major draw

Challenges

- Meeting availability is limited by the Congressional calendar and by geography
- Thus, it will usually take longer to get on a policymakers in-district schedule
- Legislative staff are in DC so additional follow up with the DC office may be needed for asks about specific policy
- Policymakers are people too! Many spend time with their family, limiting availability

Active Engagement Opportunity

Pros

- One-on-one engagement with the policymaker
- More relaxed setting and less time constraints than in DC
- Meeting can be specific to your issue or concern
- It's an opportunity to make a specific ask face-to-face

Cons

- It could take a long time to get on a policymaker's calendar
- You run the risk of not having the staffer present that you actually need in the meeting
- Follow-up and follow-through are both more challenging

Passive Engagement Opportunity

For Example

- Almost all policymakers have a form of open office hours and almost every office will tell you constituents rarely take advantage of these opportunities to engage.
- Townhall meetings – bringing several members of your organization and respectfully asking a question can get you on the policymaker's radar and build public support for your issue.
- Attending a community event the member has publicly said they will be attending – just a quick hello at a public event can go a long way in establishing a relationship.
- **Bad Form:** cornering a policymaker when they are at the grocery store or their child's sporting event.

FPC Office Hours Recap & Look Ahead



Thoughts from our Office Hours Discussions

- Official v. Political Activities
- Connecting with MOCs in an Election Year



Final Notes from CMF



Final Thoughts



Thank You

