Jessica Podesva: Hey I wanted to let folks we're going to get started. I wanted to give folks a chance to sign on. I'm just gonna wait until I see the attendee number kind of get stagnant. I still see quite a few people hopping on. So I am going to give it another minute. Okay I think we have held at this number for a little bit so I'm going to go ahead and kick things off. Hi everyone thank you so much for coming to today's webinar budget 101 an overview of the appropriations process. I am joined today by my colleague Steve Lieberman from the United spinal Association. And I will go ahead and let him introduce himself in one minute. For those of you who do not know me, my name is Jessica Podesva I'm the director of advocacy at the national Council and Independent living I am a white female in my mid-30s wearing brown glasses and a black shirt. With long brown hair tied into a ponytail. Steve do you want to go ahead and introduce yourself?

Steve Lieberman: Sure. Hi everyone I'm glad to see some familiar names among the participants list. So good afternoon, or good morning depending on where you are. I am Steve Lieberman. I'm the director of advocacy and policy for United spinal Association. And through my work with United spinal I work on all things dealing with advocacy and policy change at the federal, state and local levels.

Jessica Podesva: Steve can you give a visual description of yourself ?

Steve Lieberman: Su re and my pronouns as well he/him my visual description I am a white man with dark hair and facial hair wearing a dark pullover sweater sitting in my home office.

Jessica Podesva: before we get started, captions are available on this webinar to view the captions you can click show subtitles in your zoom menubar to turn them on. We also have captions running at AI media. The RL is too long to read out loud but we will share it in the chat box. AiMedia will allow you to enlarge the font and change the color and contrast of the captioning to whatever is most accessible to you. ACL interpreters are present today and should always be visible as we are presenting in gallery view. Please let us know if you cannot see the interpreters and we will make sure to troubleshoot directly with you. You do not need to be on zoom video to access this webinar. We will read all slide content and all questions out loud so that everything will be available to individuals calling in on the phone or who cannot see visual content. Public chat is available but please note that we ask you to remain polite and aware of what you are entering into the chat. We have a zero-tolerance policy on this webinar of any hateful discriminatory or other offensive speech is seen you will be immediately removed from the webinar and unable to rejoin. We encourage you to ask questions throughout the webinar but please know that they will be held until the end of the weather during the Q&amp;A portion. Our goal is always get to all the questions but we may not be able to depending on time. There's a number of easy and accessible ways to submit content questions to the presenters. If you are on Zoom, you can simply type your question into the Q&amp;A tab. You can enter your question into the chat. Please note that if the chat is overflowing it may be more difficult for us to capture your question if you ask it in this manner. You are also welcome to email your question to JennySichel at Jenny@NCIL.org she and our programs director Mary Kate are helping us on the backend today so thank you to both of you. Finally if you are on the telephone today you can press star nine to indicate you have a question. We ask that if you are speaking a question you limit it to the question, we ask that if you are speaking a question you limit the question to no more than 30 seconds to a minute. Thank you for following along all of those instructions and now we are gonna go ahead and get started. Next slide please? Just a brief overview of today's agenda. We are going to start with an overview of the appropriations process. Then we are going to dive into what exactly is an appropriation. Then we are going to talk about different ways of effective appropriations advocacy. Then we will have some time for questions. Next slide?

All right, so let's start with a very brief high-level overview of the appropriations process. So, step one is, and I really like they broke it into seven main steps, the link to their guide is at the bottom of the slide. The office of management and budget or OMB provides guidelines to all of the federal agencies. Provides all the budget request for the upcoming fiscal year. OMB then reviews all the agency funding requests After feedback from the agency and creates a draft budget that the president then, sense, that the president will use. OMB sends a budget to the president which includes information on the condition of the treasury for the last completed fiscal year. And the estimated condition at the end of the current fiscal year. The budget may also include other budgetary publications that have been issued during the fiscal year and other related and supporting documents pertaining to the budget. Step three submits the budget. Around February the president then submits his budget to Congress. The president's budget is a proposal divvying up federal revenue for the next fiscal year. Fiscal year runs October through September. Next slide. September 4 create and pass budget resolutions. So then the House and Senate committees on the budget take the president's budget and create budget resolutions. The resolution set the spending levels for federal agencies and after each passes their version of the budget resolutions a joint committee irons out any differences between the two versions and the revised resolution is sent to Congress to be voted on. Step five create appropriations bills working within the spending limit set in the budget resolutions the House and Senate appropriations committees determine the precise level of funding for the upcoming fiscal year. This results in a bill that is voted on and passed and the subcommittee and it then goes to the full House and Senate to be voted on. Step number six vote on a preparations bills the full House and Senate vote on the appropriations bills from the respective committees and after passing the version if there's any difference is a conference committee is appointed to iron them out and the revised bill is sent back to the House and Senate for a vote. If it is passed it then goes on to the present for a signature. Step number seven signs each appropriation bill and the budget becomes law. After it goes through the process I outlined it goes to the president for a signature, then it becomes law. When the appropriations bills are signed the budgeting process for the year is complete and the federal government is funded for the next fiscal year.

I will just say it happened in this process very slowly this year. [Laughter] and with a lot of back and forth. So this is how it is supposed to work. Ordinarily. When things go as planned. Next slide please?

Now kind of that we are dealing with a really high level overview of the process we are gonna dive into a little bit more of the meat of the budget. So what is an appropriation. An appropriation is a law of Congress that provides an agency with budget authority. An appropriation allows the agency to incur obligations to make payments from the U.S. Treasury for specified purposes. Appropriations are definite. They are specifics of the money or indefinite in amount for whatever may be necessary. The rehab act provides legislative authority for specific appropriations to fund the independent living program. Next slide.

All right, appropriations committees. A kind of talked about this a little bit before. Both the House and Senate have appropriations committees and they have 12 subcommittees where they hold hearings to examine the budget request and the needs of federal spending programs. House and Senate then produce their own appropriations bills to fund the government. The bills are quote marked up, they amend as needed and are approved by the appropriations committees. Next slide? And Steve?

Steve Lieberman: Thanks. So slide eight line items versus congressionally directed spending. So a line item is a specific program within the federal budget that is inserted by the preparation's committees in what are known as committee reports. The reports are generated by the subcommittees to provide to provide detail on how the subcommittees would like the funds to be spent and in what manner. Compared with congressionally directed spending also known as earmarks, these are hyper local direct grant award specifically requested by members of Congress to benefit specific projects organizations and their state or district. These were banned for a period of time. In that recent past but they have now returned to being used in this process. Next slide please.

So slide nine, line item example. A hypothetical example of a line item. Disability organizations seeking specific funding and instructions for the CDC, the Centers for Disease Control and Prevention to study long COVID these instructions were forced the CDC to use the money provided by Congress for the specific things Congress asks them to use it for. Meaning they cannot use it for something else. They are bound by the instructions Congress provides. Another line item example is the funding set aside for the independent living program with the ACL administration committee living budget. Next slide please. Slide number 10 congressionally directed spending example. One example of congressionally directed spending is Lehigh Valley Center for Independent living received $150,000 in the fiscal year 2024 labor HHS appropriations bill for supportive services for individuals with disabilities. This funding was specifically requested by one of their two US senators, Sen. Bob Casey of Pennsylvania. Each member of Congress has the ability to advocate for a limited number of what are called earmarks. And this is a real line item that was included in the appropriations bill that just passed. Slide 11 appropriations forms. Many congressional offices have appropriations forms available on their websites. These forms may become available as early as February each year and may have a deadline for submission in March or April. Line item or programmatic requests and congressionally directed spending requests are usually submitted through different separate forms that are available on these congressional websites. I would also add, when there is a new administration the timeline for appropriations requests tends to slip a little bit later because a new administration has to come in and prepare a new budget and the new budget then tends to be submitted to Congress. Maybe a month or two later than normal. So I just wanted to add that. Next slide please?

Slide 12 each congressional office is different but they all use some of the following to decide which request to support. Past support of the specific funding request, so many congressional offices keep spreadsheets outlining what requests they have signed onto in the past. What they were, what years they signed on to them etc. Additional things that they use, emails and phone calls received in support of the funding requests and these are needing to know what their constituents believe need to be included in the appropriations bills and they rely on the emails and back home in order to decide what do the people I represent want to see us advocate for. Meetings, so in person or virtual between advocates and congressional staff in support of the funding request is also really radical. I know from having worked on Capitol Hill for 10 years that when you have a group of advocates or a single advocate who takes the time to schedule a meeting with a Congressional office, the Congressional office will view it as rising to the top of the requests they get in they take it a lot more seriously. Additionally, the appropriations form submissions through their website are also used by many though not all Congressional offices to keep track of the submissions from their constituents on those issues that are important to them. Next slide please?

Slide 13. Effective appropriations advocacy. Next slide. I guess this is Jessica. Go ahead.

Jessica Podesva: Yep. So we are going to jump into the first kind of really important, so there are a lot of important pieces to effective's appropriations advocacy so one of them is coalition building. Really simply, a coalition building is the action of bringing two different groups together to achieve a common goal. So there are many people who could be part of this coalition including stakeholder organizations, individual leaders, policymakers or businesses. One example of a coalition here in IL would be the 545 campaign. We have built in different groups of support to support the funding for the independent living program. So that is one example. Next slide? Steve?

Steve Lieberman: yes thank you slide 15, identifying champions. So try to get champions for your requests in both the House and Senate. If a house member or senator led a sign-on letter on the issue last year they are first in line to lead again this year. Approach them first. Never assume that a congressional office will or will not support your request. Always reach out to them. Next slide?

Slide 16, sign on letters. The most effective way for advocates to demonstrate support for a funding request is through House and Senate sign on letters. Having congressional offices sign on to joint letters with their colleagues in support of that request, which are then submitted to the relevant appropriations subcommittees. The more support registered in the form of signatures on these letters, the better. Next slide.

Jessica Podesva: All right. Setting up meetings with offices and congressional staff. So you can set up meetings with congressional staff either in DC or at their state and district offices. The real simplest way to do it is to call the office and ask for a meeting with the relevant staff of the issue area you would like to discuss. In order to find your representative or their office locations you can use the find my representative tool, or the search for a senator tool to find your members websites. I have linked them in the slide. And that should include their DC office locations as well as any office locations in district or in-state. Next slide?

And now with about 30 minutes left we are going to open it up for any questions.

And I know there's questions. So don't all be shy.

Do we have any hands raised? Here we have Sharon. Okay Sharon I am going to prompt you to unmute.

You know I always have questions [laughter]

Jessica Podesva: I knew you would have one.

I was trying to hold back to see if anyone else would ask first. So you know, the whole thing with [EMF] indiscernible] now the DNC [has advanced this] it makes things a bit easier. I just spoke with a senator and a representative on the issues of some bills that are going on and I actually, the last minute I left the Congressional staffer know that we were doing it but about 60 people showed up at the meeting and that was a last-minute notice. Just people who have this issue. And that was just one area of the state. I know there's like five areas of the state where people can be invited. I was just wondering, what am I wondering? I came in late so I'm looking at appropriations for this issue. So you are saying the best thing is maybe to show up and ask for meetings. Then maybe ask for commitments and see if we can get some commitments on some appropriations or that is what we are working on and then we need to define appropriations we want?

Jessica Podesva: So there would need to be a bill on the specific issue. And Steve, jump in if I am getting this wrong I think I am understanding your question, Sharon. But if I am off I know you will stop me. But there needs to be a bill that will give budget authority for specific appropriations. So that is your first step. Getting Congress to have a bill that supports the specific funding ask that you are looking for. Then once the bill is passed, then you can start advocating for that specific appropriation in that amount.

Could it be that we could be under a certain bill that is about disability?

Jessica Podesva: Yeah it could be within...

Steve Lieberman: D Jessica Freese?

Yeah, she froze.

Let me ask this. There's actually a bill from 1968 that says any radiation that the public has the public needs to be aware of. And they did not do their, do anything about well they did one action a very long time ago but they did not do it. And since it is now disability, a recognized disability maybe there is a different way of asking for it, that this has been kind of a hot potato for us actually the national Council on disability took down the website. About, you know, the link to the website on the policy brief they put up showing, saying that EMS caused disabling and life-threatening attacks and the access board took their link down to that we had going and wrote some policy briefs that went out using these links. But anyway what was my question? It is all a wash. Anyway what she was saying is that first you have to define the bills that say that there will be appropriations. In this area. And then go with the bills, is that it? That you have defined bills that already have things where they will give appropriations and then ask for it within that appropriation?

Steve Lieberman: S generally speaking Congress traditionally needs to authorize o, a program first before funds can be appropriated to run it. Now this is not always the case. There have been a number of instances where Congress will insert language to maybe add something, tack something on to an already existing program, an already existing agency of here is something additionally that you should be doing. But in general, I would say most congressional appropriations go towards things that have been authorized by other legislation.

Great. That's good news because there's already been authorized... Legislation on this so it is just maybe we can see about asking for appropriations for it since it has already been authorized. And maybe get, and show up, you know it means it would be important for people power to get involved to show up to their representative senators and to do that kind of ask for , this is a bill that has already been passed. So we would like appropriations under this, since there should be. So now it is just people power. Asking. Is that, am I hearing that right?

I am sorry everyone. There are storms happening here in Massachusetts and I lost Internet for a moment. But I am back. So Sharon, I missed the part of your question but I do know that you have been working really hard on this electrochemical sensitivity issue and you have got a lot of great organizing. I am happy, we can always set up a one on one to talk through this further. As well.

Okay. Thank you.

Jessica Podesva: Steve there was a question in a Q&amp;A, did we answer that?

Steve Lieberman: Yes so I answered one of the questions in the Q&amp;A and I'm happy to read that now along with my answer. So the question came in , Steve, do different congressional offices wei calls and emails differently with a different office policies. Do voter voice messages count as email to which I replied yes and yes. Voter addresses are sent to congressional offices constituent email processes and sorted to the staff who handled the particular area. Also each office weights emails and phone calls to relay but I personally put my faith in emails over phone calls as emails are seen by the staff who will make decisions about what priorities to support whereas phone calls are logged by the front desk staff and not all are filtered to the legislative staff.

Jessica Podesva: Awesome phone calls can be a really great tool if you need to get quantity, too. They can be a really great but her voice and phone calls working together can be a great combined strategy approach. To make some noise. Any additional questions?

Jessica, there's some in the chat. Do you want me to read them out loud ?

Jessica Podesva: Sure.

So, from David, could you please share the current appropriation levels of key disability related programs and how this relates to levels over the past five years?

Jessica Podesva: I can speak to the independent living off the top of my head. I don't have others committed to memory and I do not know, Steve, if you have some specifics that are relevant for United spinal.

Steve Lieberman: I do. I would be able to speak on the national Institute on independent living research and rehabilitation.

Jessica Podesva: awesome. So independent living, that has been funded at static for 1 28 for last year and the year before. And it is proposed this year by the president's budget at 132. I will also say that 113 million. I will also say that last year's ACL budget and this year's they have also created a new line item called projects of national significance. And that is funded at three point something million. I think it is 3.9 million. For projects related to national significance which would be a

item that would allow us to do national significance data that kind of thing that would help show our justification for more money and a bunch of other cool things. So we really want to try and get Congress to authorize that

item in this next budget cycle. Steve?

Steve Lieberman: Sure. So within the administration on community living, which as Jessica related, does fund the independent living program, additionally there is the national Institute on disability independent living and rehabilitation research. This agency has received funding of $119 million total for the last three years and it is in the budget that was just released for fiscal year 2025 is again slated to receive $119. So it hasn't received a funding increase since fiscal year 2022 included, and the acronym is NIDILRR. Within that budget is included the model systems program. Which is divided into three components. Spinal cord injury, traumatic brain injury and burn. Of interest to the people I represent, the United spinal Association, is the spinal cord injury model systems program which has not received funding increase per model system, and there are 18 of them around the country. Has not received a funding increase since 2006. So we are talking about a program that has not received a funding increase. If someone were born in 2006, they would be headed off to college now or very soon. So that is how long it has been since these programs around the country have received a meaningful funding increase.

Jessica Podesva: Yes and I think we have received an increase since 2006 but we have not received increases that have kept up with inflation for the independent living program as well. So I think we have a common theme that we have been underfunded for quite some time and that this advocacy is really necessary that we all come together and start asking for what we need. Another question in the Q&amp;A, our emails effective when many people send the same exact email?

Steve Lieberman: YEs. And in particular so just to provide a mental picture for people, when a congressional staffer sits at their desk and opens on the computer the Congressional correspondence program that they have, and there are a number of them. They have different names. One is called IQ. One is called I-constituents but there are several of them. But they have a tool that allows them to do what is known as campaign searches. So they will go into the emails that are assigned to their inbox within this program, which is not their actual email inbox. It is separate from the typical email inbox that you or I would have. But within this program they have an email inbox of issues that are assigned to them. So let's say you have the healthcare staffer or the education staffer or you have a staffer who handles energy, environment and transportation. And these issues are broken up amongst the staffers within that office. So they will go into their email inbox that they have on this program and do a campaign search. That campaign search is able to pick out emails that have similar text and group them together and they can actually toggle up and down just how similar the text needs to be. So for example, if you have relatively short campaign email, but then you have a text box allowing for advocates to add their own personal story to that, you are able to toggle the similarities of the text to be able to capture more emails that have text that is fundamentally similar. So by allowing these emails to be grouped together in large groups, they pop up to the top of the inbox of that congressional staffer. So let's say you have 100 emails that have come in on a particular issue. That catches their attention. If you have only one email, it is typically not seen in a timely manner. And that staffer has to then go searching for it, and when they do get to it because of all the many things that they have to deal with as a part of their job usually they are not going to take the time to research the issue. Usually they are not going to take the time to write a response directly related to that issue. They will attach a generic letter and send it and close it out. That is why it is so important that we have as many people as possible sending these emails and in order to make sure that these requests get to the staffers and are then of such a magnitude that the staffer is then compelled to research and respond to it.

Jessica Podesva: Y and also the more the community is aligned on a particular issue and asking for the same things , the greater chance and as Steve said, the more they will look at it and when there is consistency among what the ask is. Which is why for independent living we have asked that our movement come, everyone kind of gets aligned with the 500 million ask. That is kind of where the campaign was born was to try to create consistency around the funding ask for the independent living line item. Any other questions?

Steve Lieberman: I do see a question in the chats from Richard. If we are able to set up a meeting with an elected official, is it more effective to set up a meeting with a group? And to that I would say , it depends. In my experience, I have seen very effective individual advocates who are able to, through the use of follow-up emails providing the data that is required to adjust all by themselves get a congressional office to support what they are requesting. Now do I think in general having larger meetings is good? Yes because I think the more people I think you get to a meeting assuming that you are able to organize the meeting well and you're able to keep people in message I think it is important because it demonstrates to the number of people in the meeting the amount of support that the issue has from constituents back home. But again I will say I have seen a credibly effective individual advocates. So it just depends on how skilled they are at advocating for their priority.

Jessica Podesva: I also wanted to highlight a comment from [Jaymo] in the chat I think it is important to learn the communication preferences of each office. For example when Jay Nixon was governor of Missouri his front desk staff kept careful count of phone calls, but we have been told that our current governor's staff does not carefully count calls but does save printouts of all emails. My old STL city alderman preferred phone calls between 7 and 8 AM especially. Two emails. My new alder woman is fine with emails and texts and I think if you have that kind of inside knowledge where you know the communication style of who is receiving all of the information that is a great thing. I do not think it is, I do not think it is 100% necessary and should not deter you from using every tool in your advocacy toolbox. But certainly building relationships where you get some of that inside knowledge of staff and build those relationships is really a good tool. Did I lose Internet again?

Steve Lieberman: No

Jessica Podesva: I am paranoid now. All right. And we have a couple more questions. Yeah, right because I meet folk for coffee that I learn how they want to be talk to. Coffee is very useful tool getting people of the office is great. Is it important to send emails to the person in charge of the issue or can the email go to a general email?

Steve Lieberman: So it depends on what you are asking. If you are asking are you sending it through the constituent correspondence program , or to that staffer's actual email. Because if you are sending it through a constituent correspondence program, depending on what issue you select to send it in and if you are doing it through vote her voice whatever organization has set up the voter voice action alert will choose is this a healthcare issue, is this a housing issue, is this a veteran issue transportation, whatever it is Social Security there is a drop-down of issue areas that generally speaking each office will have something corresponding to them. So there will be a staffer who handles the Social Security issue. There will be a staffer that handles the housing issue. Sometimes they are mis-sorted. Or an organization will select miscellaneous, which becomes a problem because not every office is good about sorting through the miscellaneous emails. And those wind up taking a little bit longer to make their way to the staffer who handles the issue. As it has to be sorted through. So maybe sometimes an issue will be sorted to transportation but it really is an energy issue within that office. It depends. In which case it might take a little bit longer. But ultimately these issues do make their way to the staffer who handles them and it can vary a little bit by the office depending on how invested they are in their constituent mail program and whether or not they can take it seriously.

Jessica Podesva: I know this webinar is mostly focused on the federal budget process but there are a number of you talking about different ways to engage with your states in the chat. I just want to say that the states follow a similar process for each of your state budgets. So some of the tools that we are talking about today are also appropriate and effective for state appropriations related advocacy. And issues. Can outreach also be done to agencies to support increased funding for example getting ACL to communicate to Congress a need to support for IL or SEI spinal cord injuries, and IL is independent living model systems. The answer to that is also yes. Yes. And we do try it. And I think the fact that the administration for community living added that projects of significance a line item in the proposed budget to Congress is a response to a lot of the outrage that our organizations have done to ACL around this issue and needing to get more consistent data for the independent living program and the measurements we can take to Congress to justify more money. And Steve, I'm sure you have an example for the SCI systems.

Steve Lieberman: Yes so with regard to SCI we have approached ACL about getting their funding request increase to which the response has been we rely on you all to get us more money. You know, I think there is a bit of a balancing act sometimes when it comes to federal agencies where some of them are sometimes reluctant to ask for increases in part because it exposes them a little bit to more scrutiny. And they do not want to be in a situation where they ask for too much, well, too much according to perhaps some of the members of Congress, at which point the members of Congress will say maybe you do not need as much as you already have. And they will try to take some of that money away. So they are of course trying to continue to justify the money that they do have, but also trying to make sure that if they do ask for more money they try not to ask for more money unless they are able to very heavily justify the request to which my response when it comes to ACL would be in particular when looking at how the NIH's budget, the National Institutes of Health how their budget has increased by about 70% in the last 10 years. Well there is money that has gone to NIH, but when it comes to disability where so much of it is routed through ACL, we have gotten the short end of the stick in recent years. So maybe it is time for people with disabilities to get some of the money that has been going other places. But that's my opinion.

Jessica Podesva: I think I would share that opinion. [Laughter] and I think another good approach for it is not only looking at where we currently have appropriations to support our work but where in any reauthorization's or in any new bills or other places for us to create new and other places of legislative authority and that is also something our groups have been looking at lately. Any other questions? There was a question about how to print the questions in the chat. So the recording of this webinar will be posted I believe both of our organization's websites. Where we will have both the materials and the recordings available. There unfortunately is not a way for you to print the questions in the chat. But the recording will be made available along with all of the materials, oh, and Mary Kate just corrected me, thank you Mary Kate. You can save the chat right now on your own. I apologize. Thank you, Mary Kate. But we will not be posting the chat to the website.

So when you are, hi, this is Mary Kate When you open the chat box there should be a three little dots and when you click that ... You should have the option to save chat. And it will download when the webinar closes.

Jessica Podesva: awesome. Thank you Mary Kate. The recording will be made available after the webinar on our websites. Any other questions? I do not see any in the Q&amp;A. Am I missing any in chat? I do not think so. Op. We have another... Sharon you have another question?

I just don't see the three dots in the chat. Usually I do. They are at the bottom by the two, you know, I do not see it. Am I missing something?

Jessica Podesva: Mary Kate, can you follow up with Sharon after ? Yes all right. So Mary Kate will follow up with you directly.

Any other questions?

All right. Well. We can go ahead and give everyone nine minutes of their day back. If they want. If there's no additional questions. There is a couple people saying that they don't have the option to save the chat, Mary Kate.

It is a setting on the back and that we currently only have available for hosts and panelists so we can change that for the upcoming webinars but for this one we can save the chat and maybe send it out people who are on the call or something like that.

Jessica Podesva: right since there is so much interest in saving the chat, let's go ahead and save it and we will email it out to registrants at the end.

Sorry that was my bad.

Jessica Podesva: No allgood thank you, Jenny. Any other questions before we sign off? I am seeing lots of thank youse so I think folks want to go eat lunch or whatever. I think it is about lunch time for some of these folks that are saying thank you. [Laughter] thank you all so much for coming. We hope this is one of many collaborations between NCIL and United spinal. And we will see you all at the next webinar. Thank you so much.

Steve Lieberman: Take care, everyone.