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# THE APPROPRIATIONS PLAYBOOK

How Policy Entrepreneurs  
Advance Proposals into Law

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# Table of Contents

	Introduction .....	1
<b>I</b>	An Overview of the Key Players in Both Chambers .....	3
<b>II</b>	Overview of the Appropriations Timeline .....	7
<b>III</b>	What You Can Do with Appropriations .....	15
	(and How to Draft Those Requests)	
<b>IV</b>	How to Engage with the Appropriations Process .....	22
<b>V</b>	Other Ways to Engage: Hearings, Questions, and Testimony .....	27
<b>VI</b>	Tracking the Process and Measuring Success in Both Chambers .....	32
<b>VII</b>	The Iterative Process: Building on Success Year after Year .....	36
<b>VIII</b>	Challenges to This Framework .....	39
	Conclusion .....	40
	Appendix: Useful Resources .....	42



# Introduction

## What Is Appropriations, and Why Lobby on It?

Lobbying lawmakers in the appropriations process is an effective way for nonprofit advocates to influence public policy. The appropriations process gives advocates an opportunity to persuade Congress to provide federal funding for their policy priorities and to block funding for programs they oppose. It also gives them a chance to achieve their goals by asking lawmakers to establish new policy programs or to make changes to existing programs. And advocates can call on Congress to include limits in appropriations bills on how executive-branch officials use federal funding to implement policies. For these reasons, it is important that advocates seeking to shape public policy understand how the appropriations process works and the different ways they can influence it.

Understanding the appropriations process is important because lobbying lawmakers as it unfolds offers advocates a more reliable way to achieve their policy goals. Congress considers appropriations bills every year, and they almost always become law. The regularity of the appropriations process gives advocates a predictable and recurring opportunity to secure major wins *and* to make incremental progress towards achieving their goals by building on past efforts to accomplish significant policy change over time. In contrast, Congress considers non-appropriations bills sporadically, and lawmakers have a hard time passing them consistently in the current environment.

Lobbying lawmakers in the appropriations process is also a manageable endeavor for advocates. The number of lawmakers and congressional staffers whom advocates must persuade to be successful in that process is relatively small. This is because most

of the decisions in the appropriations process are made by lawmakers in just two committees—the House and Senate appropriations committees. In contrast, advocates must persuade far more lawmakers—and staffers—to successfully influence non-appropriations bills because major decisions affecting those bills are made by lawmakers across 19 committees in the House and 15 committees in the Senate. In both cases, there is a centralization of more decision-making in leadership today than in past years.

Advocates can improve their ability to lobby lawmakers in the appropriations process by understanding how it works in practice. That process has admittedly changed in recent decades. And the pace of that change has accelerated during the Trump administration. But the fundamentals of the appropriations process—its who, what, when, where, and why—have not changed. Learning where and when the appropriations process happens, who is involved, what they are trying to do, and how they plan to do it empowers advocates to recognize the inflection points in that process when lawmakers and staff make major decisions. Knowledge of the fundamentals of the appropriations process also gives advocates the ability to identify the key players making major decisions in that process and tailor their policy requests to better appeal to them.

This guide prepares advocates to lobby lawmakers in the appropriations process successfully. To that end, it first gives advocates a straightforward explanation of that process and how it relates to federal budgeting more generally. The guide next provides an overview of the appropriations process featuring a quick-reference timeline depicting its most important stages, from the president submitting his proposed budget to Congress, to Congress sending final appropriations bills to the president to be signed into law. The guide then reviews the general rules and practices regulating the appropriations process in the House and Senate, as well as how they limit what advocates can achieve in that process.

This guide is organized to help advocates learn how to recognize the inflection points in the appropriations process when its most important decisions are made, locate where those decisions are made, and identify the key players who are making them. The guide also provides advocates with general engagement strategies and best practices to advance their policy priorities in the appropriations process.

# I. An Overview of the Key Players in Both Chambers

In Congress, the appropriations process is managed by the appropriations committees in the House and Senate. Each committee is subdivided into 12 subcommittees, each with jurisdiction over a set of agencies/issues (e.g., Agriculture, Defense, Labor-Health and Human Services-Education). These subcommittees are often referred to by their focus areas and are sometimes nicknamed (for example, “THUD” for the Transportation-Housing and Urban Development Subcommittee).

The chairs of these subcommittees (often called “cardinals”) and their ranking members (the lead minority-party members) are particularly influential. They, along with the full appropriations committee chair and ranking member, are the lawmakers who decide what goes into the initial drafts of the bills and reports. Their staff, notably the subcommittee clerks, do much of the drafting and are powerful gatekeepers. For an advocate, winning over the subcommittee staff can be just as important as persuading the members themselves.

There are comparatively few subcommittee clerks, they tend to stay with the subcommittee for a long time, and they can have deep knowledge. Even if they leave one subcommittee, they often will move to another. They are key players in the appropriations process—and there are comparatively few staff, so it is comparatively easy for you to manage.

## THE TWELVE APPROPRIATIONS SUBCOMMITTEES

HOUSE	SENATE
Agriculture, Rural Development, Food and Drug Administration, and Related Agencies	Agriculture, Rural Development, Food and Drug Administration, and Related Agencies
Commerce, Justice, Science, and Related Agencies	Commerce, Justice, Science, and Related Agencies
Defense	Defense
Energy and Water Development and Related Agencies	Energy and Water Development
Financial Services and General Government	Financial Services and General Government
Homeland Security	Homeland Security
Interior, Environment, and Related Agencies	Interior, Environment, and Related Agencies
Labor, Health and Human Services, Education, and Related Agencies	Labor, Health and Human Services, Education, and Related Agencies
Legislative Branch	Legislative Branch
Military Construction, Veterans Affairs, and Related Agencies	Military Construction, Veterans Affairs, and Related Agencies
National Security, Department of State, and Related Programs	State, Foreign Operations, and Related Programs
Transportation, Housing and Urban Development, and Related Agencies	Transportation, Housing and Urban Development, and Related Agencies

## Who's Who—And Who Matters?

While every member of Congress has a role in the appropriations process, not every member is created equal.

The most important member is the chair or ranking member of the appropriations subcommittee that you are interested in. They can put your idea into the base bill.

For big-ticket items, equally important are the chair or ranking member of the full appropriations committee, who can also dictate whether your idea is added to the base bill—and can block items from inclusion.

The next most important members are those who serve on the appropriations subcommittee. They have a lot of influence with the chair and ranking member and their requests for items for inclusion/exclusion are given a lot of weight. They also have the ability to offer amendments in the subcommittee to the bill text and report language.

The next most important members are those who serve on the appropriations committee. Even if they are not on the subcommittee, the chair and ranking member give their requests significant weight. They also have the ability to offer amendments in the full committee to the bill text and report language.

Members who are not appropriators do not matter that much. Authorizing committee chairs and ranking members, and subcommittee chairs to a lesser degree, routinely make requests to appropriators through a letter, and those requests are given due consideration, but not much weight. Other members have very little weight.

## **Congressional Leadership**

It's also important to recognize the role of leadership and the inter-chamber dynamics. While the appropriations committees largely shepherd the process, House and Senate leadership can intervene, especially on major conflicts or in endgame negotiations.

In addition, leadership can push down through the committee chair for their policy preferences to be reflected in the bills. This does not always happen, but it can.

## **Working with Allies in Both Chambers**

Often, a nonprofit's appropriations campaign will involve a bicameral strategy—securing a provision in the House bill and pushing for a counterpart in the Senate bill. This improves the chances that the item survives in the final law.

The House and Senate appropriations committee staff will work to informally reconcile their bills and committee reports. They go through each item and negotiate with their counterpart what funding levels or report language will go into the final bill or joint explanatory statement.

While there can be only one final number, there can be complexity around report language. For example, if the House includes report language providing direction to an agency on a policy item and the Senate is silent, the agency must follow the House's language. When the language conflicts, the House and Senate will usually provide clarity in a joint explanatory statement, which is a report that comes out from the House and

Senate that explains the provisions in the appropriations bill. If the joint explanatory report is silent but there is report language in one of the chambers, that report language is to be followed by the agency.

You should identify champions on the relevant subcommittee in *each* chamber if possible. Key players to cultivate include not just the chairs, but also members who have shown past interest in your issue or whose constituents are affected.

## Other Players

Don't forget that the executive branch and non-congressional actors play a part. The president's budget proposal (usually sent in February, but adhered to less and less) is the formal kickoff to appropriations season, laying out the administration's funding priorities.

While Congress has the power of the purse, appropriators will often ask agency officials for their views and may be swayed by administration support or opposition to certain provisions. As an advocate, if your agenda aligns with an agency's goals, you can quietly enlist its technical feedback or moral support (at least ensure your requests aren't at odds with what the agency truly needs). Conversely, if you are fighting for a policy the administration dislikes (say, restricting some controversial program), be prepared to counter its objections in your messaging. Additionally, think tanks, watchdog groups, and the media can influence the climate around appropriations by spotlighting issues; strategic media coverage or coalition letters can bolster your case to appropriators that an issue is urgent and has public support.

In sum, know the playing field: the action starts with the appropriations subcommittees (House and Senate), spreads to the full committees, then to the floor of each chamber, and finally to negotiations between the two chambers (with possible leadership brokering). At each stage, slightly different actors hold sway—but a smart lobbyist for a nonprofit will have laid groundwork with all of them: cultivating subcommittee champions, engaging committee staff, and informing leadership and other allies as needed. Chapters V and VI will consider how exactly to approach these players and make your case effectively at each stage.

## II. Overview of the Appropriations Timeline

The appropriations cycle follows an annual calendar (with some variation) tied to the fiscal year (which begins October 1). Below is a typical timeline of how the process unfolds and key advocacy opportunities at each stage. Keep in mind that “typical” is increasingly subject to change; delays and continuing resolutions can push these dates or undermine the cycle entirely.

A note on timing: the fiscal year’s number is the year in which most of the calendar year occurs. In other words, FY 2025 started on October 1, 2024, and ran through September 30, 2025.

### APPROPRIATIONS LOBBYING TIMELINE

MONTH	KEY ACTIONS	ADVOCACY OPPORTUNITY
<b>December and much of the previous year</b>	Agencies and White House are drafting their requests	Talk with agencies about their requests, engage with White House on its agenda
<b>January–February</b>	President’s Budget released; Member request forms open	Finalize asks, identify champions, start submitting requests through member portals
<b>March</b>	House subcommittee hearings begin	Submit testimony, suggest hearing questions
<b>April</b>	House subcommittee and full committee markups; Senate subcommittee hearings	Push amendments, meet with staff
<b>May–June</b>	House floor action; Senate drafting	Offer floor amendments, push Senate allies
<b>July</b>	Final committee actions, prep for negotiations	Solidify support in both chambers

<b>MONTH</b>	<b>KEY ACTIONS</b>	<b>ADVOCACY OPPORTUNITY</b>
<b>August</b>	Recess	Reengage constituents, build pressure
<b>September</b>	Continuing resolution likely or final deals	Push leadership
<b>October 1</b>	This is when the fiscal year starts	In theory, but not in practice, the appropriations bill must be law by this date
<b>October–December</b>	End-of-year omnibus or final passage	Keep pushing leadership and champions

### **THE DECEMBER PREVIOUS AND EARLIER: ENGAGING WITH AGENCIES**

Agencies and the Office of Management and Budget (OMB) are busy drafting their appropriations requests starting 18 months before the start of the fiscal year. OMB provides budget planning guidance to agencies in the spring of the previous calendar year; agencies submit their budget requests to OMB in September; agencies are notified of OMB’s decision in late November (known as passback); and the president submits the budget (in theory) in January or February.

During this time, you can engage quietly with the agencies and with OMB to make your requests known and encourage them to include it in their requests to Congress. This process goes beyond the scope of this playbook. Within the playbook’s scope, it is a good time to quietly engage with the agencies to learn what they are requesting and whether what you are proposing would be welcome by the agency or would raise issues for them.

### **JANUARY–FEBRUARY: PLANNING AND REQUESTS**

This is the legislative branch preparatory phase. By this point, savvy advocates have decided on their “asks” for the upcoming bills. For your nonprofit, this means honing exactly what funding amount or policy language you will request (the more specific, the better).

No later than early February, identify the key staffers on the relevant subcommittee and the members of Congress who could be your messengers. You’ll need a lawmaker to formally carry each request, so have underway outreach to potential champions now. During this timeframe, also draft your request language—whether it’s bill text or report language—and coordinate with any coalition partners to ensure allies are on the same page.

In a normal year, the president submits a budget proposal to Congress by early February, and soon after, the House and Senate appropriations committees issue guidance and deadlines for member requests.

By late February, members of Congress will be submitting their official request letters to the appropriations subcommittees, so you should have provided your input to those offices you're working with before those letters go in. It's also wise to request meetings with the subcommittee chair and ranking member's offices around this time—even if they can't meet right away, getting on their radar early matters. You may wish to engage with them earlier on in the process to see whether they will give you a sense of when hearings might occur or what issues are on their mind.

### **MARCH: HEARINGS AND MEMBER ENGAGEMENT**

House appropriations subcommittees typically start holding hearings in March. These include agency budget hearings (where agency heads testify on the president's budget request) and sometimes public witness hearings (where outside experts or advocates like nonprofit leaders can testify).

Keep an eye out for any chance to testify—and if there is a public witness hearing relevant to your issue, sign up or ask to be invited. Even if you cannot testify in person, almost all subcommittees accept written testimony for the record from the public (see Chapter VI). Note that primarily the House allows the public to testify in person, and both chambers allow written testimony.

March is also the time to “place” questions in hearings—as hearings occur, work with friendly congressional offices to suggest questions that members can ask agency witnesses.

Planting a pointed question in a hearing can raise the profile of your issue and put agency officials on record about it. Likewise, encourage members to submit questions for the record (QFRs) after hearings—written questions that members send to agencies for formal response once the hearing is over, allowing additional information gathering.

In parallel, March is when committee staff start compiling initial drafts of the appropriations bills and reports. It is critical by late March to meet with members on the subcommittee and their staff, making your case for why your request should be included. If you have supportive members who are not on the subcommittee, this is when they should convey their backing to colleagues who do sit on the subcommittee (for example, via a joint letter or informal lobbying behind the scenes).

Also be mindful of any internal deadlines: often, subcommittee chairs ask their members to submit their top priorities by the end of March, so make sure your champions follow through in time.

Use this month to build outside pressure: release supportive statements, get experts to write op-eds, or organize grassroots support to show appropriators there is public demand (what one might call “grassroots and expert pressure”).

#### **APRIL: SUBCOMMITTEE MARKUPS AND DRAFTING**

In April, the action intensifies: House subcommittees often begin marking up (amending and voting on) the bills, and the full appropriations committee may start moving bills to approval. During this period, continue all your March efforts—submitting any final testimony, feeding questions to members for upcoming hearings, and meeting with any remaining undecided members.

By now, you should also see initial subcommittee drafts of bills/reports (sometimes called “chairman’s mark”). Check these drafts for your priorities. If your language made it in at this stage, congratulations—but your work isn’t done. You’ll need to protect it through the process.

If it is not in the draft, now is the time for amendments. Subcommittee markups may allow amendments, but they are often tightly scripted. More commonly, if you missed the subcommittee draft, you target the full committee markup. In the House full committee, any appropriations committee member (even those not on that particular subcommittee) can often offer amendments.

Identify a committee member willing to offer an amendment for your cause when the bill comes to the full committee in April. Provide them draft amendment text and a persuasive one-pager. Committee members are busy—make it as easy as possible for them (see Chapter III).

Also, use Dear Colleague letters and whipping to build support. For larger or controversial amendments, your ally might circulate a letter to fellow members asking for support, and you might quietly encourage other non-committee members to speak up in favor as the bill heads to the House floor.

Meanwhile, April 15 is the target date for Congress to adopt a budget resolution (which sets the overall funding cap for appropriations), though in recent years this has often been bypassed or delayed. If a formal budget is not passed, each chamber may “deem” an allocation for the appropriations committee. For advocacy purposes, the key point is that by April, you generally know how much money is available for appropriations in general, and for each of the subcommittees specifically.

#### **MAY: FLOOR ACTION IN THE HOUSE (AND SENATE COMMITTEE WORK)**

By May, House appropriations bills begin reaching the floor. The House often aims to finish committee work on all bills by late spring so that floor consideration can happen in May and June. As an advocate, in May or June you might need to shift to a floor strategy—especially if your item did not get adopted in committee.

The House floor in theory gives any representative a chance to offer an amendment. This can be another bite at the apple for your issue. In recent years, however, bills have been packaged together and come under a closed rule in the House, resulting in little opportunity to amend in either chamber.

But just in case, identify a member (it could be the one you worked with in committee or someone else) to introduce your amendment on the floor, and line up support from others to speak on its behalf. Keep in mind that House leadership and the Rules Committee may issue a structured rule that limits amendments; if so, you’ll have had to submit your amendment for approval ahead of time.

The timeline is tight: bills typically go to the floor about a week after being reported out of full committee, so there is little time to organize.

In parallel, the Senate Appropriations Committee, which often starts later, may be holding its subcommittee markups around May. Senate committee markups are generally less open to outside amendments (and sometimes they simply “report out” a draft without extensive amendment voting). Still, stay in touch with your Senate champions—May is when you want to ensure your request is in their conversations as the Senate drafts its versions.

### **JUNE–JULY: RESOLVING DIFFERENCES AND FINAL CHAMBER VOTES**

By June, the House may have passed some bills, and the Senate will be catching up. In a functional year, the Senate Appropriations Committee works through June on its bills, with an aim of enactment by the August recess. Ideally, by the end of June, both House and Senate appropriations committees have reported all bills.

In reality, the House might advance some bills and the Senate might only draft theirs internally. From an advocacy perspective, treat June as the last chance within each chamber to influence language—if the Senate is marking up your bill this month, push hard for any amendments in that process.

Meanwhile, if House bills are reaching final passage, take stock of what you achieved. Celebrate your wins (e.g., a funding boost or a directive included)—but prepare to fight for them in the next phase. It is common by July for House-passed provisions to face challenges in the Senate, and *vice versa*. Sometimes, external events (like a sudden budget deal or a crisis) in July set overall spending levels or force revisions.

Stay alert and keep lines open with committee staff—by now they know you and your issue, so quick conversations can update you on whether your provision is safe, in trouble, or in need of a push.

### **AUGUST RECESS: PAUSE AND PREP**

Congress typically breaks in August. Use this lull to regroup. This is a good time to engage in oversight. For instance, if the House included a directive for an agency to

produce a report, August is when you might start talking to the agency about how they will implement it (showing appropriators that you are ensuring follow-through).

It's also a time to shore up your coalition and strategy for the fall. If some of your priorities did not make it into either the House or Senate versions, decide if you will make a play to insert them during final negotiations (which is difficult, but not impossible if you have key senators on your side).

Also consider using the recess to generate some hometown pressure. Members often hold town halls; perhaps a question can be raised about your issue, reminding them that it matters to constituents.

### **SEPTEMBER–OCTOBER: FINAL NEGOTIATIONS OR CONTINUING RESOLUTIONS**

The fiscal year ends September 30. In a textbook scenario, by this time all bills have passed both chambers and are in conference committee to resolve differences. More often, not all bills are done, and Congress passes a Continuing Resolution (CR) to keep the government funded temporarily from October 1 onward.

A CR will generally keep funding for agencies at the levels they were funded in the prior fiscal year, but there can be “anomalies.” In other words, it is possible to include provisions that fund your pet project or restrict funds from being used for purposes you oppose. Lobbying on a CR is generally a play aimed at leadership and top appropriators.

Assuming it is not a CR situation, if your provisions are in identical form in House and Senate bills, they are likely to survive in any final package. If they are different or only in one bill, the fate will be decided in non-public negotiations between House and Senate appropriators (and quite possibly leaders).

This is when having champions in the room matters—House and Senate subcommittee chairs will barter over what stays. You can still advocate: send letters to conferees, ask friendly members to weigh in with appropriations leadership in support of your items, and provide any needed compromise language. Be aware that high-level political trade-offs might come into play (your issue could become a bargaining chip for something else), so stay flexible on small tweaks if they preserve the core of what you need.

If a CR extends into this period, use the extra time to continue making your case to any new decision-makers (for example, if control of one chamber changed hands or new committee leaders are involved after an election, reeducate them on the history of your provision).

### **END-OF-YEAR OMNIBUS OR FINAL PASSAGE**

In recent years, many appropriations have ultimately been rolled into a large “omnibus” package late in the year (November or December—or later) or a series of “minibuses.” By the time a final bill is moving, *last-minute amendments are very limited*. At this stage, your job is to verify that your hard-won provisions are either in the final text or not, and make a final push if something is teetering. Sometimes advocates at the 11th hour alert allies to a quiet removal of report language or a surprise new rider; don’t let that catch you off guard.

Assuming success, appropriations for the fiscal year are signed into law at this stage (or if not, further CRs/shutdown dramas ensue—but let’s assume success). When the omnibus or final bill text and explanatory statements are released, search for your priorities. This is the moment of truth to “see what you got.”

Always be prepared for delays and the need to repeat steps. If current-year appropriations drag on into the next calendar year, you may find yourself juggling two cycles at once (advocating for carryover issues in an overdue bill while starting on next year’s requests). The key is to remain engaged at every stage—and to keep communicating with the committee staff and member offices so that you are aware of shifting schedules. Chapter VI will discuss how to track each step and evaluate your success.

# III. What You Can Do with Appropriations (and How to Draft Those Requests)

One of the first questions to ask when planning your appropriations lobbying campaign is: *What exactly am I trying to get?* Appropriations can be used to accomplish a wide range of policy and funding objectives. This chapter outlines the kinds of actions you can pursue through appropriations, provides examples of each, and offers tips on drafting effective requests.

## WHAT YOU CAN DO WITH APPROPRIATIONS

ACTION TYPE	EXAMPLE	MECHANISM
Increase/decrease funding	+\$5 million for literacy programs	Bill text
Policy directives	Direct EPA to report on emissions	Report language
Prohibit actions	“None of the funds may be used...”	Bill text
Require reports	GAO to review cybersecurity	Bill or report language
Pilot programs	Fellowship for technologists	Report language (with funding)

## Increase or Decrease Funding for a Program

At its most basic, an appropriations bill sets funding levels. You can lobby to increase funding for a program that aligns with your nonprofit’s mission or to cut funding for something you oppose. For example, if you work for an education nonprofit, you might push to boost funding for a literacy grant program by \$5 million. Conversely, an environmental group might urge cuts to a harmful subsidy.

*How to draft:* Funding adjustments in requests are straightforward: cite the program’s account name, current funding, and your proposed new amount:

“Provide an additional \$5,000,000 for \_\_\_\_, bringing the total to \$X.”

If increasing funding, it is often useful to suggest an offset (i.e., which other account to reduce) to stay budget neutral and to make it easier for appropriators to say yes. This is a fairly annoying process, and you need to stay within each of the appropriations sub-committee bills to find the item you want to reduce.

In practice, House members’ submission forms often require identifying offsets for increases. Keep your justification concise: explain what the additional money will accomplish or why the cut will not harm essential services.

Remember: across-the-board plus-ups are challenging; tie the request to urgent needs or high-impact returns. Cite supporting data if available, and if you have a personal story or local example, mention it in your pitch to members, so that they can use it in debate.

## **Add Policy Directives or Restrictions (“Riders”)**

Appropriations bills can carry policy instructions, often called “riders.” These provisions might restrict an agency from doing something or direct an agency to take a specific action, using the power of the purse as leverage.

For instance, a rider could state that “none of the funds made available by this act may be used” for a particular activity. By including that language, Congress doesn’t outright change the underlying law, but for that year it effectively forbade the agencies from that practice.

On the other hand, a directive might say, “The Committee directs [Agency] to establish a pilot program to . . .” or require that funds be spent on a specific new initiative.

An appropriations rider can be included as bill text or report language.

*Bill text* is legally binding but must survive points of order. House rules forbid “legislating” in an appropriations bill, though there are many ways to get around this.

Keep bill text riders tightly focused and clearly within the appropriations committee’s remit—framing as a limitation on funding use is safest.

*Report language*, on the other hand, is not legally binding but expresses congressional intent. It often starts with “The Committee directs” or “The Committee encourages.”

For example, House appropriators used report language to press the Congressional Research Service to make its reports publicly available, after years of debate on the issue. The report stated that within 90 days, CRS had to submit a plan for publishing all non-confidential reports online. That strong directive, while not a law, created pressure and eventually helped force CRS to implement public access.

When drafting report language, use clear, commanding verbs (“directs,” “expects,” “urges”) and include a timeframe or reporting requirement if you want follow-up. It is common to have a timeframe in the format of “within 180 days of enactment of this legislation.” For matters that are more urgent, or if you are concerned that the underlying law will not be enacted, this variation can be useful: “within 180 days of the issuance of this committee report.”

Be aware: agencies generally comply with report language, especially if phrased as a direct instruction, because they know Congress can escalate the issue next year by writing it into law if ignored. If you encounter resistance that a proposal is “legislative” (and thus vulnerable in bill text), consider moving it to report language as a compromise.

Note, however, that Congress’s power to enforce report language depends on its legislating through a more regular process, which itself is in the process of breaking down. The Trump administration has directed agencies to deprioritize report language. In any event, it is good practice to engage in follow-up advocacy with Congress and the executive branch to ensure that report language is implemented.

## **Require Reporting and Transparency**

One very common use of appropriations is to require agencies or independent auditors to produce reports on topics of interest. These reports can unearth information, evaluate program performance, or prompt action.

For example, Congress has often tasked the Government Accountability Office (GAO) with reports, such as evaluations of cybersecurity practices after major breaches. A sample provision (from a Financial Services appropriations bill) reads: “Provided further, That not later than 6 months after enactment of this Act, the Comptroller General shall submit . . . a report that—(A) evaluates . . . [specific issues].”

Reports can also be required from the agencies themselves—e.g., “The Committee directs the Department of Energy to report by March 2026 on its progress in implementing X initiative.”

*How to draft:* Define the scope of what should be studied or reported, and who should do it. If GAO, use “the Comptroller General shall ...” language in bill text or a line in report language. If an agency, use report language: “The Committee directs [Agency] to submit a report to the House and Senate Appropriations Committees within [X time] on [specific content].”

Be realistic—GAO usually needs at least six months to a year for a deep study, and agencies might need a few months for a basic report. The value of these reports is twofold: they create accountability (the agency knows Congress will be checking on them) and they produce information you can use to further your cause. Many enduring policy changes start with a simple reporting requirement that sheds light on a problem, which then justifies more action next appropriation cycle.

Items to consider addressing include: who is directed to do something, what specifically must they do, when must they do it, and, if it is a report, to whom must it be provided?

## Prompt Investigations or Audits

Related to reporting, appropriations can prompt formal investigations. For example, if there are concerns about mismanagement in a program, appropriators can instruct an inspector general or GAO to conduct an audit or investigation. The legislative branch appropriations bill has had directives like “the Comptroller General shall conduct a review of . . .” or instructions strengthening an inspector general’s authority.

*How to draft:* If you aim to legislate an actual change (like amending a statute to expand an inspector general’s powers or create an office), you will need bill text and likely a willing appropriations chair to support including it. These are essentially legislative provisions and may require a waiver of rules, so use sparingly. You will most likely need the support of the authorizing committees to change the underlying bill text.

It is generally easier to stick to directives for investigations that fit within the “oversight” role of appropriations. Phrase them as, “The Committee is concerned about X and *directs* the [Agency/inspector general/GAO] to investigate [specific issue] and report back on [findings or recommendations].” Reinforce the seriousness by mentioning why the review is needed (e.g., “to ensure accountability, the Committee directs ...”). By writing this into committee report language, you signal that funds for the agency are contingent on cleaning up the issue.

## **Control the Timing of Spending (Availability of Funds)**

Appropriations can specify how long money is available. Normally, funds are annual: i.e., the agency must commit to spending them within a single fiscal year, but sometimes Congress designates funds as “multi-year” or “no-year” (available until expended) for certain projects.

As an advocate, you might not often push for multi-year funding unless it is crucial for your program (for instance, a construction project might need funding that doesn’t expire in one year). However, you might support provisions that rescind (take back) unused funds or prevent them from expiring if not used (“to remain available until expended”).

*How to draft:* Changes in availability are usually done in bill text right after the dollar amount, e.g., “\$20,000,000, to remain available until expended.” If you have a case where a program keeps lapsing money because of timing issues, you could lobby for two-year funding authority in the appropriation. Conversely, if funds have sat unspent, you could support a rescission (which would be a negative appropriation in a later title

of the bill). These are more technical requests and require working closely with committee staff to get the language and timing right.

## Create New Programs or Initiatives

Technically, creating a brand-new program is the job of authorization bills, and appropriators often resist outright “new starts” without authorization. However, appropriations can pilot new ideas in subtle ways.

Appropriators might repurpose an existing pot of money or use a general provision to launch a small program. For example, if your nonprofit wants a “Congressional Fellowship for Emerging Technologists,” an authorizing bill might be ideal, but an appropriation could include funding in an existing account and directive language for a pilot fellowship program.

*How to draft:* Tie it to an existing funding stream if possible: “Within funds provided for X, the Committee provides up to \$1,000,000 for a pilot program to Y.” Describe the program goals in report language so the agency has clarity. The key is to work with committee staff—they might say “we can’t create that outright, but we could encourage the agency to use some funds for it.” Even a nudge from the committee can get an agency to start something new.

Alternatively, the committee can request a plan for a new program—essentially laying the groundwork this year so that next year they can fund it once the plan is in place. Always consider the long game: if you can’t get the full program this cycle, get a study or pilot in place (back to the iterative approach).

## Drafting Best Practices

No matter the type of request, a few golden rules apply.

- **Be clear and specific.** Ambiguity is the enemy of implementation. Write what you mean—for example, if the Environmental Protection Agency should spend \$2 million to create a grants database, state that plainly.
- **Stay within scope.** The request should relate to funding and operations, not broad policy reforms. If you try to enact policy changes, be very thoughtful in your approach.
- **Look at what the committee has done before.** Bill text and report language are publicly available. Look to prior years to see how the committee has addressed your issue, or similar issues, and mimic their approach.
- **Keep it brief in your ask.** Your formal request or testimony should include the exact language with a summary up front. Staff appreciate not having to wade through paragraphs to understand what you want—they can refer to the detailed text when needed.
- **Note previous committee efforts.** If the committee provided a study of your project, and then pilot funds, make sure you cite their previous efforts. They won't always remember what they've done before, so be sure to provide chapter and verse citation so they can build on top of their previous efforts.

The takeaway for appropriations is empowering: even if you can't pass a standalone law, you can often achieve the same ends through a well-crafted appropriations provision. Use this chapter's guidance to choose the right tool for your goal, and draft your request in a way that sets it up for success.

## IV. How to Engage with the Appropriations Process

Having defined what you want to achieve, you must next figure out how to make it happen—whom to talk to, when, and how to navigate the procedural hoops. This chapter offers strategic advice on engaging the key players (individual members and committee staff), getting your language inserted as early as possible, and handling amendments if needed.

### Start Early and Target the Right People

The mantra for appropriations advocacy is “early and often.” As Chapter II described, you should begin outreach in January/February to shape members’ official requests. Identify your champions—ideally members of the appropriations subcommittee relevant to your issue.

If, say, your nonprofit focuses on foreign aid, your obvious targets are members of the State/Foreign Operations Subcommittee. Meet with them or their staff in the winter to pitch your idea. Provide a one-pager and draft language they can use in their request letter.

If no subcommittee member is willing, broaden to any member who cares about the issue (they can still submit a request letter on behalf of your issue, even if they don’t sit on the relevant appropriations subcommittee, or even the full committee. The appropriations subcommittee will consider external member requests, especially if a few members echo the same ask). It also helps to enlist bipartisan sponsors if possible—a request signed by both a Democrat and a Republican, for example, will signal broader support and reduce the chance of partisan resistance.

When talking to individual members (and their staff), frame your ask in terms that resonate with them. Appropriators and their staff are looking for requests that have strong constituent or member interest, align with the member’s passions, or allow the member to claim credit for something positive.

If you can say, “Representative X, in your district this program supports 500 jobs, and our request would increase that impact,” you are speaking their language. Also, be candid about cost and feasibility—if you are asking for a funding increase, have a rationale for *why that amount* and *where the money might come from*. Being forthright and well-prepared builds credibility.

Do the staff’s work for them: draft the actual letter or request text the member could use, provide suggested report language, and supply any backup info (e.g., if you cite a statistic, footnote its source). Congressional staff are incredibly busy; if you hand them a ready-made package, they are far likelier to carry your water. Expect to do all the work for the staff when you lobby appropriators—this includes writing talking points, providing data, and even drafting Q&A in case the member gets questions about the request.

## Engaging Committee Staff

While members are the decision-makers, much of the work happens at the staff level. Appropriations committee staff (both majority and minority) sift through hundreds of member requests and public input. Cultivating a relationship with relevant staff can give you crucial intel and an avenue to make your case more directly. When you meet committee staff (often after you’ve gone through a member’s office), your approach should be factual, concise, and helpful.

They want to know:

- Is this request doable (legally and fiscally)?
- Does it have support from the member(s) they work for or others on the committee?
- Has the agency weighed in?
- Are there letters of support from relevant agency advisory bodies or research from a neutral authority like GAO that supports the request?

Committee staff appreciate when you can answer technical questions. If they ask, “Isn’t this prohibited by authorizing law?” or “Under which account would this funding go?” you should have an answer or offer to get back to them quickly.

Never bluff—if you don’t know, say so and follow up with the info. If there is opposition to your idea (maybe an authorizing committee isn’t fond of it, or the agency has been resistant), address it honestly and propose why appropriators should still proceed (perhaps the authorizers have stalled for years, etc.).

Be mindful of the committee’s perspective: appropriations staff juggle thousands of requests. Highlighting broad support and low controversy helps. If your request might stir controversy (say, it restricts a hot-button issue), be ready to argue why it is worth the fight or mitigate the concern (perhaps narrow the language).

Be courteous and professional—this is obvious, but it bears repeating. These staff are your gateway to success; being pushy or going over their heads to their bosses without their buy-in can backfire. Aim to be seen as a *resource* to them, not a pest.

## Getting Your Text in the Base Bill vs. Amendment Strategies

The holy grail of appropriations lobbying is to have your desired provision included by the subcommittee in the “base” bill or committee report from the start. That is the easiest path to victory—it means the subcommittee chair (and the committee, by extension) already supports it. To achieve this, all the early steps with members and staff are crucial. If you have convinced the right people, your language might simply appear in the draft that is marked up, with no fight needed.

Always check the subcommittee draft bill and report as soon as they are released. If your provision is reflected there, all the better. You may still want to submit a statement or have a member speak in support during markup (to reinforce it), but you can largely move to defense, ensuring that it stays in through the full committee and floor.

If your language is *not* adopted initially, you move to amendment mode. There are a few junctures for amendments: subcommittee markup (in the House, subcommittee

markups sometimes allow them, but often they are pre-negotiated), full committee markup, House floor, and Senate floor.

Each stage requires a member sponsor. In committee, it must be a member of the committee. Identify who on the committee is willing to offer the amendment—ideally someone aligned with the issue or who owes you a favor, etc. Provide a draft amendment in the proper format. It may be identical to what you submitted initially, or modified if committee staff suggested a tweak to make it acceptable. When the amendment is offered, be prepared that the chairman might oppose or accept it.

Sometimes, if an amendment isn't too objectionable, the chair will say "I have no objection" and it sails through via voice vote. Other times, they will oppose and it goes to a recorded vote, which can be partisan. Gauge the politics: if it is likely to be opposed by the majority of the committee, consider whether pushing it to a vote is worth it. (In some cases, even losing an amendment can highlight the issue and lay groundwork for the future, but in others it can irritate the committee. Use your judgment—a friendly chat with minority or majority staff can hint at receptiveness.)

On the House floor, if you get an opportunity under the rules, the amendment game is about coalition-building. Work with House leadership or the Rules Committee if needed to ensure your amendment is made in order (if under a structured rule). Then, alert allies to speak during debate. Perhaps secure a Republican and a Democrat to each take a minute in support (bipartisan floor support sends a strong signal).

If opposition is likely, arm your floor manager with rebuttals. Sometimes, controversial policy amendments can still pass on the floor if they appeal to a transpartisan interest (e.g., privacy rights, states' interests, etc., depending on content). Or have your Democrat narrowcast their message to Democrats, and your Republican narrowcast their message to Republicans.

Note that in recent Congresses, majority leadership sometimes discourages *any* floor amendments to "their" appropriations bills to keep things moving.

## Working the Committee and Leadership Dynamics

Sometimes, your biggest ally or obstacle is not on the subcommittee but above it: the full appropriations chair or even the Speaker/Senate leader. If your issue is something that leadership cares about (for good or ill), be aware. For example, if you're pushing a policy rider that the president strongly opposes and might veto over, congressional leadership will scrutinize that in final negotiations. In such cases, your lobbying should include making your case to leadership staff, not just appropriators. Conversely, if your priority aligns with a leadership initiative (say, enhancing Congress's own capacity), you might get a surprising boost from on high.

Keep the appropriations committee hierarchy in mind: the subcommittee chair can usually carry the day on smaller items, but big-ticket moves often need the full committee chair's blessing. So it might be worthwhile to also brief the full committee staff about your request, especially if it spans multiple subcommittees or has budgetary significance.

## Managing the “Back and Forth” and Maintaining Relationships

Getting an appropriations provision adopted can be an iterative back-and-forth process. You might get feedback such as, “We can't do exactly this, but would you be okay with that?” Always consider such counter-proposals seriously—partial progress is better than none. For instance, the committee might say: your request for a \$10 million increase is too high, we can maybe do \$2 million. Or, we can't include the directive as bill text, but we'll put a sentence in the report.

Accept wins graciously and acknowledge the committee's effort. That builds goodwill for next time. And if you lose an amendment or it gets stripped out at some stage, do not burn bridges by lashing out. Instead, thank the members and staff for considering it, express hope to work with them on resolving concerns, and make it clear you'll try again in the future. Remember, appropriations is yearly—today's “no” can be turned into next year's “yes” with persistence and improved strategy (see Chapter VII).

## V. Other Ways to Engage: Hearings, Questions, and Testimony

In addition to adopting the direct lobbying tactics covered in this playbook, nonprofits can influence appropriations through other channels: by participating in hearings (both publicly and behind the scenes) and by submitting written testimony to the committees. These avenues are often underutilized, but they can substantially reinforce your message and get it on the record.

### Planting Questions at Hearings

Congressional hearings on agency budgets or oversight topics are prime opportunities to highlight your issues. While you as an outside advocate won't be asking the questions, you *can* supply friendly lawmakers with questions to ask on your behalf.

Recall from Chapter II that in the March-April hearing season, you should “watch for hearings where you can place a question.” In practice, this means: once hearing schedules are announced, identify which members will be questioning the witnesses (usually the subcommittee members).

Pick one or two members (often your champions or those who showed interest in your topic) and reach out to their staff *well ahead* of the hearing. Offer a succinct suggested question or two that the member could ask the agency witness. Make it a question that either prompts the agency to acknowledge a problem your proposal seeks to fix, or leads the witness to place supportive information on the record. If the agency is friendly, give them a heads-up to be ready for a question along particular lines.

A well-posed question can tee up your subsequent funding request by establishing need or interest. Busy congressional staff are often grateful for suggested questions—developing insightful questions takes time, and if you hand them a good one, you increase the odds that it gets used.

To the extent you can, tailor the question to the member’s style and the hearing context. If it’s a fast-paced budget hearing, the question should be concise. If it’s a more exploratory oversight hearing, a two-part question might be okay. Look to the transcript from last year to see how a member likes to phrase their questions.

## Questions for the Record

As noted above, after hearings, members can submit written QFRs to follow up on topics. A question for the record is a question submitted in writing after the in-person portion of the hearing has concluded but before the hearing record is closed. These questions are provided by members to the committee clerk, who in turn transmits them to the appropriate agency. Agency staff will answer the questions in writing, which will be provided to the member and ultimately published in a hearing report.

You can encourage members to write QFRs and do the legwork for them. If your question didn’t get asked live—or even if it did and you want more detail—ask a member’s office if they would submit a QFR. These questions can pin down an agency or provide valuable intelligence and official statements that you can use in your advocacy.

## Submitting Written Testimony

Both the House and Senate appropriations committees typically invite written testimony from the public on their annual bills. This is a chance for your nonprofit to make a formal statement of record about your funding or policy requests.

The House subcommittees historically have a more open process—many subcommittees hold a “public witness day” where outside individuals testify for a few minutes

each, and all subcommittees accept written testimony submissions (usually via email, by a certain deadline).

The Senate is more limited; Senate appropriations subcommittees do not hold public witness days, but they will generally accept written testimony. If they don't explicitly say they will, you can often send written testimony to Senate subcommittees even if they don't formally ask; it will be received and kept on file. Always check each year's committee announcements (usually on the appropriations committee website or via Dear Colleague notices) for instructions: they will outline deadlines and formatting for testimony.

## How to Write Effective Appropriations Testimony

Appropriations written testimony is typically short and to the point. In fact, the House Legislative Branch Subcommittee, for example, limits written testimonies to five pages (single-spaced), and the Senate often limits to four pages.

Follow all formatting rules meticulously: e.g., one-inch margins, at least 12-point font, required cover information, etc., because committees will reject testimony that does not meet their guidelines.

Start your testimony with a heading that states who you are and whom you represent, and which bill or agency you're addressing. Usually, the first paragraph should succinctly summarize what you are asking for. If there is a specific bill or account, name it upfront. By clearly stating the dollar amount or policy change at the beginning, you ensure the staff reviewing hundreds of testimonies sees your request without digging.

The body of the testimony should provide a *brief* background and justification. This might include: a sentence or two about your organization (establish credibility), the problem or need you are addressing, evidence or data supporting your request, and the positive outcomes if your request is granted.

Given the space constraint, every sentence must earn its keep. Use bullet points if that helps to concisely list benefits or key points (just be sure the formatting is simple and text-based, as fancy formatting or images can be problematic for congressional technology). Do reference previous committee actions: demonstrating momentum and prior

interest can help. If you have personal or local examples, you might weave that in as well. But remember, *five pages maximum* (often fewer), so brevity and clarity are essential.

## Submitting Written Testimony

Submit your written testimony by the method required—usually emailing a PDF or Word document to a designated address, with a specific subject line format. Include any required forms. For example, House Appropriations has a witness disclosure form about federal grants or payments your organization receives as well as a request for the submitter’s biography.

After submitting, it’s appropriate to send a courtesy copy to the staff of the subcommittee you’ve been dealing with or to the offices of your champions: “FYI, we submitted formal testimony, attached here as well for your reference.” This ensures they see it and might even quote it in internal discussions. Your testimony will enter the committee’s official record.

## Testifying in Person

If your request to testify in person has been granted, congratulations—face time with the committee members is invaluable. Usually, you will get five minutes to speak. How can you make the most of it?

- Plan for a concise, compelling delivery. Do *not* try to read a five-page statement verbatim—in person, that would be a sure way to lose your audience. Instead, prepare a brief oral statement (it can be shorter than your written submission).
- Focus on one or two top points. For example: “Thank you for the chance to testify. I want to share the story of one community that illustrates why this funding matters . . .” A personal touch can be powerful. Appropriators, like all humans, respond to storytelling and clear rationale.
- You want to leave the impression that what you propose is reasonable, modest in cost, and will do a lot of good.

- While speaking, make eye contact with the members. It's okay to have notes, but try not to bury your face in a script. Practice your delivery so you can speak a bit extemporaneously and genuinely. If you notice the chair or ranking member looking bored or checking their phone (it happens), don't panic—but work to reengage them.
- Keep your tone respectful and positive. Even if you are essentially asking for more money (which implies something is underfunded or that a problem exists), frame it as an opportunity.
- Compliment the committee when appropriate: if last year they did something good related to your issue, thank them for it. If something didn't happen that was supposed to, you can note it, but do so gently.
- Avoid assigning blame or getting into political swipes—focus on solutions, not personalities or partisan angles.

After your five minutes, there may be questions and answers, but likely there will be none. Often at public witness hearings, only the chair and ranking member attend, and they might or might not ask questions.

If they do ask questions, it's a bonus chance to elaborate. Listen carefully to what they ask—and *if you don't know an answer, say so and offer to follow up*. This is another way to build trust: be a reliable source of information.

## VI. Tracking the Process and Measuring Success in Both Chambers

Once you've launched an appropriations lobbying campaign—making requests, submitting testimony, securing allies—track the process closely. Advocacy doesn't end when you've made the ask; you need to monitor what happens to your priorities at each stage, in both the House and Senate, and be ready to act on that information. This chapter outlines how to track the appropriations bills as they move, and how to determine what you achieved (or didn't) at the end of the cycle.

### Monitoring Developments—Stay Alert

The appropriations process can move quickly. A subcommittee may mark up a bill with little notice, or an amendment may be introduced unexpectedly on the floor. To avoid surprises, monitor reliable sources of information. These include:

- Committee press releases (sign up for email updates from the appropriations committees)
- The Congressional Record and Congress.gov for official actions
- Media sources like *Politico* or *CQ/Roll Call*, which often report on behind-the-scenes appropriations negotiations
- Maintain contact with the staff you've met—politely ask if they can keep you informed of schedule updates or outcomes relevant to your issue

Some staff will volunteer information, but often you must inquire. It's fine to send a short email after key meetings. Once markups start, get the documents as soon as they're released. Read the subcommittee bill and report PDFs—search for keywords related to

your issue (the language might not be exactly what you submitted, so search by topic terms, too).

## TIMELINE FOR AVAILABILITY OF HOUSE APPROPRIATIONS DOCUMENTS

PROCEEDING STAGE	DOCUMENT	TIMELINE FOR DISCLOSURE
Meeting notice	Notice	Must be given three legislative days in advance
Subcommittee markups	Draft bill text, resolutions, and reports	Available to committee members three calendar days in advance of date of consideration
	Draft bill text	Available to public 24 hours in advance of proceedings
	Amendment text	If adopted, must be publicly available within 24 hours of adoption; if withdrawn, within 48 hours
	Record votes	Available in electronic form within 48 hours of the vote (includes description of the amendment/motion and how members voted)
	Draft committee report	No requirement; however, as a matter of practice, available 24 hours prior to a full committee markup
Full committee markup	Draft bill text, resolutions, and reports	Available to committee members (but not the public) three calendar days in advance of the date of consideration
	Draft bill text	Publicly available 24 hours in advance of the proceedings
	Draft committee report	No requirement, but generally available 24 hours in advance of the markup, usually at the same time as the draft bill text
	Amendment text	If adopted, publicly available within 24 hours; if withdrawn, made available within 48 hours. As a general practice, amendments are distributed to the press as they're offered in committee
	Record votes	Published in electronic form within 48 hours of the vote
Final bill text	Bill text	No deadline by which it must be made publicly available after committee adoption. Chair's duty is to report the bill and report "promptly." Becomes available when filed with the House of Representatives

Senate appropriators do not provide a timeline for the availability of their documents. Appropriations Committee Rules for the 119th Congress declare that subcommittee bill text and reports shall be provided to each member of the committee 36 hours prior to committee consideration to the extent practicable. The Rules also declare that amendments to be offered at full Committee markups shall be provided to the chair and ranking member and the subcommittee and full committee 24 hours prior to markup to the extent practicable.

The Senate Appropriations Committee is exempt from the Senate Rules requiring public announcements of hearings at least one week before the hearing commences. It is also exempted from keeping a complete record of committee actions, including roll call votes.

## **Use the “Official” Documents and Compare**

Each chamber produces detailed reports: a House Report and Senate Report for each bill, and eventually a Joint Explanatory Statement in a conference or omnibus. These documents are where you can read the substance of what was decided. They are lengthy, but the table of contents and indexing are helpful jumping-off points. If you advocated for report language, read the relevant section to ensure that it reflects what you wanted.

## **Keep a Scorecard**

At the end of the process (once the final legislation is passed and signed), tally your results. How many of your requests were fully granted, partially granted, or not at all? This will guide your strategy for next year. If something succeeded in the House but was not enacted, that is a prime candidate to try again, as you know there was some support. If something never gained traction in either chamber, you need to analyze why. Was it too ambitious? Did you lack a champion? Maybe outside events overshadowed it.

Appropriations lobbying is an ongoing process (see Chapter VII). This means tracking doesn't stop on October 1. Suppose you received a directive in the FY 2025 bill for the agency to report something by June 2025; set a reminder to check on that.

When June comes, check whether the agency delivered the report. If not, you have fodder for pushing the committee in FY 2026 to hold the agency accountable. Some advocates maintain a running list year to year of all report directives relevant to their issues and whether agencies have fulfilled them. This holistic approach makes you a trusted source for committee staff—you can gently remind them. It shows you are paying attention and helping ensure that their instructions are carried out.

## **Celebrate Success, Learn from Setbacks**

When appropriations season concludes, take time to celebrate what went well. Did you get a line in law or report that achieves a long-sought goal? That's a success for your cause—share it in your communications (with proper attribution to Congress's action, of course, since you want to reinforce their good deed publicly). Thank the members and staff who helped; a sincere thank-you note goes a long way in relationship-building (besides being plain good manners).

## VII. The Iterative Process: Building on Success Year after Year

One of the greatest advantages of lobbying the appropriations process is its annual cycle—if you don’t get everything you want this year, there’s always next year. And if you *do* get something, you can come back to expand or refine it. Successful appropriations advocacy is inherently iterative. In this chapter, we discuss how to leverage this year’s wins (or partial wins) into bigger gains in the future, and how to maintain momentum for your cause over multiple fiscal cycles.

### Incremental Expansion

Many policy changes via appropriations start small and grow. Suppose that last year you secured \$2 million for a new pilot program. This year, return with data or anecdotes from that pilot’s early phase and ask to continue or increase it. Perhaps the committee initially labeled it a “pilot” to test the waters—your job is to demonstrate success so they feel comfortable making it an ongoing program. It’s not uncommon that after 2–3 cycles, a pilot initiated in appropriations becomes an established line item.

The lesson is: use each year’s action as a springboard. If you received half your funding request, politely ask for an increase next time and explain why the increase is necessary. If this year you received a directive for an agency plan, next year’s ask might be funds to implement that plan.

Iterative advocacy also means you can recover from setbacks. If your request was denied, analyze why. That’s a signal to bring more evidence, find more supporters, or

address the concerns that they've identified. If you don't know why something was not included, work to figure out where the pushback came from.

## **Keeping Up the Relationships**

The iterative process is also about relationships over time. Every year, members and staff rotate, retire, or shift roles. You need to continually engage and often reeducate new players. If you've built a strong rapport with, say, a subcommittee clerk (staff director) and they move on, make sure to establish a connection with their successor early on—share the history of your issue and what has been done in previous bills. Institutional memory can be short on the Hill; you can help provide continuity.

## **Responding to Changing Contexts**

Iterative lobbying doesn't happen in a political context—elections and events can change the landscape. If an election flips the House or Senate majority, you might suddenly have new committee leadership that has different priorities. Or a crisis (for example, a pandemic or natural disaster) could reorder budget priorities, squeezing or opening space for your issue. Be prepared each cycle to recalibrate. For instance, if your champion retires, identify a new one quickly, and consider briefing that person: “Senator So-and-so always championed this in the committee; we hope you might take up the mantle.” On the other hand, if someone unfriendly to your cause takes the gavel, consider a strategy of playing defense to at least maintain what you've got, rather than pushing an expansion that year. The beauty of an iterative approach is resilience: a bad year doesn't doom the whole effort; you can come back when the environment is better.

## **Know When to Pivot**

Iteration is great, but be willing to change course if something is not working after repeated attempts. Maybe you have tried for three years to get a certain rider and it is always stripped in conference. Instead of banging the same drum a fourth time, consider

a different tactic: could you achieve a similar outcome via report language or through a different subcommittee’s jurisdiction? Or is it time to focus on authorizers or litigation or other means outside appropriations?

Appropriations lobbying should be one part of a larger strategy. There is a time to persist and a time to pivot. Use your judgment and input from allies (including the committee staff—sometimes they will candidly tell you, “This won’t work as long as Senator Z is ranking member,” giving you a hint to hold off or modify the ask until conditions change). Or maybe your idea has a fatal flaw. Be honest with yourself.

## The Long View—Relationships and Reputation

As you engage in the appropriations process year after year, you as an advocate (and your organization) will develop a reputation. Ideally, it’s one of being knowledgeable, persistent, honest, flexible, and cooperative. Members and staff will come to recognize that you will be back every cycle championing your cause. That’s good—you become *the* person for Issue X.

If you are too intransigent (“all or nothing every time”), you risk being ignored. But if you show you are willing to build towards a goal and will come back for more later, you will be seen as pragmatic. In time, you might find that instead of you chasing the committee, the committee starts to preemptively include your issue because they expect it. For example, a staffer might say, “We know you’ll ask for Y again, so we already put something in the draft.” That is a golden moment earned by consistent effort.

In summary, think of appropriations advocacy as a continuum, not a one-off. Each cycle is a chapter in the story of your initiative. Write each chapter such that it builds on the last: reinforce successes, learn from setbacks, and always come back with a refined ask. By doing so, you turn annual funding bills into stepping stones toward your larger policy goals. As you iterate, you also strengthen your credibility and relationships on the Hill, making each subsequent effort a bit easier. This iterative process is how small tweaks grow into significant reforms and modest pilots become national programs—all through the persistent, savvy use of Congress’s power of the purse.

## VIII. Challenges to This Framework

While the principles in this playbook are rooted in long-standing precedent, the political context in which they operate continues to evolve. That process has admittedly changed in recent decades. And the pace of that change has accelerated during the Trump administration. But the fundamentals of the appropriations process—its who, what, when, where, and why—have not changed. Learning where and when the appropriations process happens, who is involved, what they are trying to do, and how they plan to do it empowers advocates to recognize the inflection points in that process when lawmakers and staff make major decisions.

It remains to be seen how Congress will respond—whether it will adapt its methods for asserting spending authority, or whether the White House and OMB will adopt new approaches to policy implementation. As we navigate this changing landscape, one thing is clear: staying vigilant and flexible is more important than ever.

# Conclusion

Lobbying the congressional appropriations process is a marathon, not a sprint—but for nonprofits seeking to advance their missions, it’s a marathon well worth running. This playbook has explored how appropriations work and why they offer a uniquely practical avenue for policy change: they happen every year, they must pass for the government to function, and they concentrate influence in the hands of a few key players who are open to persuasive input.

The overarching theme is strategic persistence. Appropriations lobbying has immense power—quiet provisions tucked in a funding bill can shift agency behavior, seed new programs, and shine a light on problems that would otherwise stay hidden. The key is to be methodical and diligent. Know the calendar and the players. Build relationships and trust over time. Use data and stories hand in hand to make both a rational and emotional case. Be ready to compromise and to celebrate incremental wins. And perhaps most importantly, think long-term.

As you put these principles into practice, remember that every nonprofit advocate on Capitol Hill is, in effect, a teacher and a partner to Congress. You are educating members and staff about issues they may not know in depth. You are offering solutions (often fully drafted) that they can use to address those issues—effectively doing much of the work for them. When done respectfully, this is welcomed; you are helping them make informed decisions and score legislative wins of their own (they get credit for funding a new initiative or increasing transparency, for instance). It’s a symbiotic relationship: your cause advances, and they fulfill their role of responsive governance. Many veteran

appropriators actually enjoy working with knowledgeable advocates, especially on issues that aren't front-page news, because it helps them discover and fix problems in government programs.

Good luck!

# Appendix: Useful Resources

## Congress.gov Appropriations Status Table

- Available at: [www.congress.gov/crs-appropriations-status-table](http://www.congress.gov/crs-appropriations-status-table)

A website, maintained by the Library of Congress, that contains links to the report language, bill text, and vote information for every appropriations bill from FY 1999 to present. It tracks approval at the subcommittee, full committee, chamber, and resolution of chamber differences levels.

Don't miss clicking on the "notes" hyperlink below each appropriations subcommittee. This hidden and often overlooked feature often contains links to the committee press releases, the release of draft bills by one party, and much more.

This table can be slow to update. For legislation that is at the subcommittee or full committee level, look to the appropriations webpages. Until the legislation has been formally introduced, which occurs after full committee markup, you likely will not find it here.

## House Appropriations Committee Website

- Available at: [appropriations.house.gov](http://appropriations.house.gov)

This is the official website for the House Appropriations Committee. Information often will be published here before it is available elsewhere. Watch the press releases tab for announcements of the hearing and markup schedule.

The "Subcommittees" tab has links to the 12 appropriations subcommittees. You will want to watch the individual subcommittee pages because they will provide links

to “FY XX Member Day Hearing Instructions” and “FYXX Outside Witness Hearing Instructions” when they are available.

The “FY XX Member Request” tab will contain guidance for requests concerning funding levels, bill text, and earmarks (also known as community project requests.)

The “Committee Activity” tab, accessible when you click on the appropriate subcommittee, will provide links to notices concerning markup, including votes and amendments.

Note that Democrats and Republicans have different appropriations websites. The website at [appropriations.house.gov](https://appropriations.house.gov) is for whoever is in the majority. You can find the two websites at:

- **Republicans:** [republicans-appropriations.house.gov](https://republicans-appropriations.house.gov)
- **Democrats:** [democrats-appropriations.house.gov](https://democrats-appropriations.house.gov)

## Senate Appropriations Committee Website

- Available at: [www.appropriations.senate.gov](https://www.appropriations.senate.gov)

This is the official website for the House Appropriations Committee. Information often will be published here before it is available elsewhere.

Guidance for appropriations requests and earmarks is updated each year and is available under “About the Committee,” then “FY 20XX Appropriations Requests and Congressional Directed Spending.”

The subcommittees tab has links to the 12 appropriations subcommittees. You will want to watch the individual subcommittee pages and routinely click on “submit written testimony” to see when guidance has been posted. There is no other indication of when guidance is available for the upcoming fiscal year.

The hearings tab generally will provide notice of upcoming hearings, although it is also useful to monitor the main webpage. Markups in the form of “business meetings” often are published here as well.

## Congressional Budget Justifications

- Available at: [www.usaspending.gov/agency](http://www.usaspending.gov/agency)

Appropriators require agencies to submit Congressional Budget Justifications that provide a plain-language explanation of what is being requested. In addition to publication on each agency's website, OMB is required to publish the reports online. OMB is not in full compliance with the law, but a compilation of links to the vast majority of CBJs is available on the USASpending website.

When clicking through to the agency pages, you should also see CBJs for prior years. If you do not, they may be available by using the Wayback Machine at <https://web.archive.org/> and choosing an earlier date.

## The Budget of the United States Government

- Available at: [www.whitehouse.gov/omb/information-resources](http://www.whitehouse.gov/omb/information-resources)  
*(for the current administration only)*
- Available at: [www.govinfo.gov/app/collection/budget](http://www.govinfo.gov/app/collection/budget)

The Budget of the United States Government, also known as the President's Budget Request, is a collection of documents containing the president's proposals for the fiscal year, his messaging, and a wide range of information about current and historic spending.

Most notable for your purposes, the Budget Appendix contains the line by line proposed bill text, report language, and narrative explanation of what each program does for every program in every agency.

The budget proposal for the current administration is generally available on OMB's website. Proposals for prior years are available on the Government Publishing Office's website: [govinfo.gov](http://govinfo.gov).

# About the Authors

## Daniel Schuman

Daniel Schuman is the founder and Executive Director of the American Governance Institute, which develops ideas and educates policymakers on innovative approaches to strengthening American democracy, state capacity, and federal governance. His work focuses on the legislative branch, including transparency, oversight, appropriations, congressional rules, and institutional capacity, as well as the use of data and technology to modernize government.

Daniel is the founder and editor of the *First Branch Forecast* newsletter, the creator of EveryCRSReport, a co-founder of the Congressional Data Coalition, and a convenor of the Open Government Roundtable, and former chair of the Open Government Federal Advisory Committee. Daniel has been in Washington for a quarter-century, worked on Capitol Hill, at the Congressional Research Service, and for various non-profit organizations including the Sunlight Foundation and Demand Progress.

Daniel has testified before Congress on government modernization and transparency and teaches on U.S. government and public policy. In 2026 he was named to the FOIA Hall of Fame. Daniel graduated from the Emory University School of Law and is a former fellow with CodeX at Stanford Law School.

## Soren Dayton

Soren Dayton is the Director of American Governance at the Foundation for American Innovation, where he leads work to strengthen Congress, rebuild legislative capacity, and advance a conservative approach to state capacity and effective public management. His work centers on the political conditions under which institutions function well: structuring political conflict so it produces deliberation rather than dysfunction, restoring the practical arts of administration as a conservative virtue, improving the capacity of government to implement policy, and cultivating a civic culture that values stewardship, collaboration, and institutional responsibility. His portfolio includes congressional procedure, separation of powers, political parties, development of governing norms on the political right.

Soren has spent two decades at the intersection of politics, policy, and technology-driven innovation. He previously directed governance initiatives at the Niskanen Center and Protect Democracy and served as a legislative assistant to Rep. Nick Smith (R-MI), working on foreign policy, science, and budget issues. His experience includes co-founding a software company and advising nonprofits, civic organizations, and public affairs firms on institutional reform, strategy, and congressional engagement. He has testified before Congress on improving governmental effectiveness and serves as a resource to policymakers working on modernization and oversight. Soren holds an A.B. in Anthropology and Mathematics from the University of Chicago and is a former Democracy Fellow at the University of Chicago's Center for Effective Government and a Penn Kemble Fellow at the National Endowment for Democracy.

# About the Organizations

## About the American Governance Institute

The American Governance Institute exists to renew and modernize the foundations of American self-government. We believe that by fostering a virtuous cycle of reform within our governing institutions, the United States can build the resilient democracy its people deserve. Central to this renewal is a capable and independent Congress. Through sustained engagement with lawmakers, institutional leaders, and civil society, we will generate reforms necessary to transform our democratic system.

## About the Foundation for American Innovation

The Foundation for American Innovation champions the technology, talent, and ideas essential to American prosperity, security, and flourishing.

We are builders, hackers, and scholars advancing an optimistic vision of the future—aligning technology with human ends to forge a more perfect union between innovation and the American republic.

Realizing this future requires far tighter coupling between innovators and policymakers than exists today. FAI works to make that possible. We help policymakers become more effective stewards of innovation, and we equip technologists and founders to better understand, engage with, and ultimately improve the machinery of governance. Our work spans the domains most critical to the vitality of the American republic: artificial intelligence; governance and state capacity; energy and infrastructure; technology and telecommunications; science and innovation; defense and national security; and education.

## About Inclusive Abundance

Inclusive Abundance is creating the infrastructure to transform how America solves its most pressing challenges. We bring together policy experts, public officials, business leaders, and philanthropists to learn about, define, and implement solutions that combat scarcity in three ways:

- Making it easier to build housing, energy, and infrastructure;
- Encouraging cutting-edge scientific research, technological innovation, and manufacturing; and
- Improving government effectiveness for all Americans.

Inclusive Abundance Initiative, a 501(c)(3), engages in research, issue education, communication, and related programming around abundance policy and ideas. Inclusive Abundance Action, a 501(c)(4), advocates for abundance policy.