Meeting Lead Checklist

All the resources are available at the Congressional Visits webpage at crs.org/visit-congress.

Scheduling the congressional visit

☐ **4-6 weeks before your visit**: Begin initial outreach to the office(s) you are coordinating the visit(s) with.

- For visits during the Congressional recess periods, aim to schedule your visit between the end of March through April for the spring recess and the end of July through August for August recess.
- Aim to schedule a visit (House or Senate) with your member of Congress and include the staffer in Washington DC who covers the topic of the asks.
- For all meeting requests, include your name and your contact information (including address). Lead with your connections to the local community the representative or senator represents before noting your connection to Catholic Relief Services. Share the group who will attend with you, the issue you wish to discuss, who you wish to meet with and a range of dates/times you can meet.
- As Meeting Lead, we ask that you thoughtfully consider the implications of an in-person visit for the group, if that becomes available. Work with your group to see if any virtual accommodations would assist in comfort and opportunity to participate. CRS asks each group to adhere to CDC guidelines for COVID-19.

See Appendix I for additional guidance for scheduling visits.

Once the congressional visit is scheduled

☐ **Coordinate creating a Zoom link** for the congressional visit **and share it** with the congressional office. Zoom guide: **Scheduling meetings**

☐ **Communicate to the office that you will supply a link and provide the Zoom link.** *If the office has a problem with the Zoom platform, then, ask if they would be willing to set up a visit link.*

☐ **Share the send ahead/leave behind document with the office when you share the Zoom link.**

☐ **Schedule a prep call with the participants.** Consider **using a Doodle poll** to find the best time.

☐ **Coordinate creating a Zoom link** for the prep call **and share it** with your group.

☐ **Review** the Congressional Visits webpage for resources to support your preparation and planning. **Share** the webpage with the other participants on the visit. Encourage participants to review the learning and planning resources and to spend time doing research on their member(s) of Congress and possible connections to the legislative asks.

During the Prep Call

- ☐ Welcome the group, review agenda/objective of the prep call & allow time for quick introductions
- ☐ Frame the purpose of congressional visit. *See Appendix II for additional guidance.*
- ☐ Communicate logistics:
  - Share who will be attending from the congressional office.
  - Indicate that meetings typically last 15-30 minutes.
    - *If a Zoom link is created with a free account, it has a 40-minute limit. Remind participants to join the Zoom link no earlier than 10 minutes before the start of the visit.*
- ☐ Discuss the typical structure of meetings. Consider completing the Congressional Meeting Roles Worksheet together to determine roles.
  - **Congressional Meeting Roles Worksheet (en español)**
- ☐ Be sure to remind the group to be flexible to any changes & to communicate with you if needs arise.
  - **Note**: Express that sometimes technical glitches may occur. It is recommended to have backup speakers for the issues in case the assigned speakers lose their video or telephonic connection.
- ☐ Role play & practice an abbreviated meeting as a group.
- ☐ Reminders:
  - Ensure one person per meeting will send a 'thank you' email to the staffer.
  - Encourage your group to stay on the Zoom call after the member of Congress and/or staffer(s) hang up so you can quickly debrief, if time allows.

Before your congressional visit

☐ **A few days before your meeting**: Call the staff member you coordinated with to schedule the meeting to confirm and share that your group is looking forward to your scheduled time. A quick follow-up email reminding them of the link may be helpful.

☐ Send an email reminder to the group of participants highlighting the Zoom link and remind the group to log on no more than 10 minutes prior to the visit if you are using the free version of Zoom.

After your congressional visit

☐ Conduct a group debrief that consists of two main focus areas:

- Focus on what you heard from the office and strategize follow-up steps.
- Have participants reflect and feed back, first on what went well, then what could be better next time.

☐ Designate someone from your group to send a follow up email to the office within 1-2 days after the visit takes place.

☐ Designate someone from your group to log your legislative visit.

- **How to: Log an Advocacy Action with a Member of Congress.** Please provide as much information as possible in the summary section.
- View the **Guidance for Reporting Congressional Visits**. For participants that are not part of a CRS Chapter or Club, report your visit using the Advocacy Reporting Tool.

☐ As the Meeting Lead, send a congratulatory email to the group soon after the call. If the group is unable to debrief the visit following the end of the congressional visit, consider offering an optional space for the group to gather to celebrate and share learnings.

Appendix I: Additional Guidance for Scheduling Visits

Best practice: begin outreach to a congressional office 4-6 weeks prior to the week you would like to plan a visit.

- Fridays are the best days to send a request for a meeting when floor votes are not happening.
- Refrain from sending requests for meetings on Mondays.
- On average, congressional staffers receive hundreds of emails each day. Make your outreach clear, concise yet comprehensive with this information to make it easy to respond to.

Best practice: aim to meet with the member of Congress and include the staffer in the meeting.

- You are encouraged to fill out the online form on the official website of your member of Congress to try to schedule a meeting with the member of Congress. Ask to include the staffer in DC who covers the topic of the ask.
- If you are looking for the contact information of the staffer, call the DC office of the member of Congress and ask for this specific staffer's contact information (email & phone number).
- If you are interested in a visit with a local staff member (i.e., District or State Director), make it known that you also wish to have the staffer in DC join the visit.

Best practice: lead with your connections to your local community in your outreach to make your advocacy as effective as possible.

- Congressional offices want to know what the people they represent care about. Lead with your connections to your local community before you reference any affiliation with Catholic Relief Services as you work to schedule visits with congressional offices.

Best practice: Be polite but persistent as you work to schedule the visit.

- After a few days, if you have not received a response, follow up your initial request with a call to the scheduler or the DC office. Share when you sent your request and what you would like to discuss.
- On average, it takes a congressional staffer 1-2 weeks to process a request via email. Keeping messages clear, concise and friendly goes a long way.
- If you don't get a response, try to email the same staffer about one week later drawing attention to your initial request.
- Then, follow up your second email with a second phone call a few days later. Let them know when you sent your requests and the issue you would like to discuss.
- If you do not hear back from the staff member you reached out to initially after multiple attempts to outreach via email and phone call, try to contact another staff member in the district/state, such as the District or State Director.

Appendix II: Framing the Importance of Constituent Visits with Congress

- Share that some people may be nervous about the upcoming meeting—especially if people have never done this before—and they should look at these meetings as opportunities to be in conversation with leaders.
- Express that personal contact from you as a constituent is the most influential advocacy. These contacts are relationship-building opportunities with congressional offices.
- Encourage the group to lead with their connections to the local community and to introduce themselves as active constituents of the area your representative or senator represents to make their advocacy as effective as possible. We encourage the group to lead with their local connections before sharing any affiliation with Catholic Relief Services.
- Share that these meetings are important because, as Catholics, we believe it is our responsibility to be engaged members of our communities and country.
- Reiterate that the most important aspect of constituent meetings is for constituents to share who they are and why they/their communities care about the issues they're raising. Share about how others in your community beyond those present in the visit are actively supporting the response issues you are sharing about. For example, consider sharing about how others in your local community (i.e., parish, university) are actively engaged and contribute to CRS Rice Bowl, which is a program during a holy season for Catholics called Lent, where people pray about issues of hunger locally and around the world, and then give donations to support addressing the issue.
- Emphasize that these visits are just one touch point as we, constituent advocates, continue to engage our members of Congress.
- Encourage the participants to consider opportunities for follow-up with the various members' offices to promote long-term relationship-building with offices.
    - Note: CRS Chapters/Clubs are invited to organize visits with their members of Congress three to four times each year.
    - Note: Partners not involved in CRS Chapters/Clubs are invited to engage in actions by using tools on the Campaign Action Center throughout the year as individuals or with their communities.

Note: Individuals discerning interest in joining or starting a CRS Chapter/Club can complete **this form** (**en español**).