# Lobby Meeting Planning Form

**Logistical Information:**

Rep/Sen: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Time of meeting: \_\_\_\_\_\_\_\_\_ Location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

In attendance from Member’s office: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

In attendance from Group: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Issues to cover: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Primary facilitator: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Preparation: Assess member on the Champion Scale. What will you thank them for? If the member is new, research their campaign information/website to know their priorities.

**Key Meeting Roles:**

Meeting leader/facilitator: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Storyteller: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Issue/Request maker(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Note-taker: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Follow up: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Photo taker: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Champion Scale:** -1 opposed, 0 neutral/uninformed, 1 supporter, 2 advocate, 3 leader, 4 champion

**Meeting Agenda**

1. **Introductions and thank yous (Facilitator).** Facilitator thanks member for the meeting and for past actions, then calls on people to briefly introduce themselves.
2. **Meeting overview.** Outline the agenda for your meeting (Facilitator). Talking points:
3. **Issue #1: Using the tax code to make a difference for families in the district/state (Child Tax Credit, Renters Tax Credit), food, and nutrition.** Where is the member on the Champion Scale on these issues? Anything you can thank them for? Who will explain the issue using EPIC (Engage, Problem, Inform about the solution, Call) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­\_\_\_? Talking points and questions for the member to make it local, conversational, and engaging:
4. **What is your specific request?** Who will ask this \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?
5. **What response do you expect and how will you respond?** Who will respond \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_? Possible talking points:
6. **Issue #2: Funding global development assistance, maternal and child health and nutrition, child vaccines.** Where is the member on the Champion Scale on these issues? Anything you can thank them for? Who will explain the issue using EPIC (Engage, Problem, Inform about the solution, Call) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_? Talking points and questions for the member to make it local, conversational, and engaging:
7. **What is your specific request?** Who will ask this \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?
8. **Finishing up and summarizing next steps.** Thank the member for their time and the conversation. Summarize what you talked about, your requests, and what next steps are (sending additional information, following up with staff, etc.). Talking points:
9. **Take a photo.** Ask the member if you can take a group photo. Who \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?

**Follow Up**

* How will you follow up on the meeting with the congressional office? Who will do this \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?
* How will you maximize the impact of this meeting back home with your group, in your community? Who will do this \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?