

Lobby Meeting Planning Form



Rep./Sen. Name: _____ Staff member name: _____

Date and time of meeting: _____

Location: _____ (include link if virtual)

Issues of focus (find lobby materials on [our campaigns page](#); focus on 2-4 issues at most):

Global Poverty issue #1

U.S. Poverty issue #1

Global Poverty issue #2

U.S. Poverty Issue #2

Preparation & Key Meeting Roles (see sample agenda on page 2):

| | |
|-----------------------------------|-----------------------------------|
| Primary facilitator/leader: | Notetaker: |
| Issue Presenter/Request maker(s): | Photo taker: |
| Storyteller(s): | Post-meeting follow up/thank you: |

Meeting attendance Be sure to include all new members and partners who may attend:

Champion Scale:

Where does your member fall on the [Champion Scale](#) for your issues? If the member is new, research their congressional website about their priorities. Levels may vary by issue:

- Where is member on the scale for Global Issue #1: _____
- Where is member on the scale for Global Issue #2: _____
- Where is member on the scale for U.S. Issue #1: _____
- Where is member on the scale for U.S. Issue #2: _____

Plan next steps! After the meeting, who will follow up? What steps will you/your group take to move this lawmaker up the Champion Scale?

Sample Lobby Meeting Agenda

(blanks are for the name of the person responsible for that section)

- **Introductions (Facilitator).** Thank the member (and/or staff) for the meeting, reconfirm allotted time for the meeting, and then call on people to briefly introduce themselves. Mention if you are a constituent.
 - If meeting with aide, ask them to introduce themselves & share what they cover for the office.
 - Ask if they know about RESULTS. If not, prepare a sentence or two to describe our work.
- **Thank the Rep./Sen. and staff** (_____). Use the Congressional Scorecard and/or other resources under [“Working with Congress”](#) to find legislation or actions to thank the member for. What will you thank this person for?
- **Brief meeting overview (Facilitator).** Review the topics and outline the agenda for your meeting.
- **Present each issue based on priority (Issue Presenter and/or Storyteller):** Issue presenter can explain the issue (can use [EPIC Laser Talk format](#)). Storytellers can share their story. **Remember to include your request for each issue.**
 - What response do you expect for Global issue #1 and how will you reply?
 - What response do you expect for Global issue #2 and how will you reply?
 - What response do you expect for U.S. issue #1 and how will you reply?
 - What response do you expect for U.S. issue #2 and how will you reply?
- **Summarize requests and determine next steps** (_____). Summarize what was discussed, reiterate the requests, and ask when you can follow up on the requests.
- **Thank the member and/or staff for their time** (_____). Ask if you can take a photo (or screenshot if virtual).