Congressional Visit Roles Worksheet

*Use this worksheet to outline the roles and flow of your congressional meeting. Please note that the same person may fulfill multiple roles. You may also want to identify back-ups for various roles if you are participating in a virtual meeting.*

# Overarching Roles

### Facilitator: [Point Person]

*Keeps the meeting moving by introducing each new speaker and facilitating conversation.*

### Timekeeper: [Point Person]

*Ensures the group adheres to the allotted time.*

### Notetaker: [Point Person]

*Notes any reactions, questions, and follow-up requests from the meeting.*

### Technology Lead: [Point Person]

*Monitors the meeting for any technology issues and addresses them as they arise.*

# Meeting Outline

### I. Introductions

*Someone should 1) thank the member or staff for the meeting and for something the member has done recently and 2) confirm time allotment for the meeting. Then everyone should introduce themselves and invite the person with whom you’re meeting to introduce themselves, too. In your introductions give your name and the city in which you live and note that you’re a constituent. One or two people from the group should also briefly say why this issue matters to you.*

* [Point Person]
* Order of group introductions: [Insert names in order]

### II. Summary of the Issue

*Summarize the issue at hand as well as your ask.*

* [Point Person]

### III. Personal Story

*Share why this issue is compelling to you, using a story to illustrate your point.*

* [Point Person/People]

### IV. Discussion

*Facilitate discussion with the member or staff, noting any questions you cannot answer as well as any requests for additional information.*

* [Point Person]

### V. Wrap-up

*Reiterate your ask, establish next steps, including when you can call back to follow up, and express your gratitude for their time and attention.*

* [Point Person]

### VI. Follow-up

*Report back on your meeting to CRS. Send a thank you email to the person with whom you met including any necessary follow-up information.*

* [Point Person]