

Preparing for Your Fly-In

A comprehensive checklist on scheduling meetings from Advocacy Associates
www.advocacyassociates.com

Pre-Registration / Structure

- Is this event part of a larger conference? Or is it focused on Capitol Hill meetings.
- If part of an annual conference:
 - Will participants register separately for the lobby day?
 - If they do not register separately, how will participants know that meetings are being scheduled for them?
 - What addresses will you collect for participants? (note that home vs. work addresses can yield different representatives.)

Registration Process / Participant Info

- What types of participants do you have?
 - Individual advocates (will meet with their one representative and two senators)
 - Business owners/employees (may meet with multiple representatives and Senators based on business location)
 - Board/chapter heads/others (may meet with multiple representatives based on region)
 - Some combination of the above
- Do registrants understand that their meetings will be scheduled based on the address received?
- Do you have a constituent address for every legislator you'd like your advocates to meet with?
- How will you crossmatch registrant addresses with relevant legislators?
- Do your registrants have multiple facilities (for example, business owners with outlets in multiple states)? Once those addresses are crossmatched, how will you determine which Congressional meetings would be most important to pursue (usually based on committee assignments or relationships)?

1030 15th St. NW Suite 750 West, Washington, DC 20005
AdvocacyAssociates.com info@advocacyassociates.com (202) 349-1030
30,000+ meetings • 30,000+ advocates • 10 years of service

- When is your registration cut-off date? How much time will that leave you to arrange meetings?
- Will you have late and/or on-site registrations? If so, how will you integrate them into existing meetings or get new ones?
- Will there be group/state coordinators to coordinate messages and be a point of contact for last minute meeting changes? How will you decide who they will be?
- If there are subgroups to consider (board members, chapter leaders, etc.) how will you keep track of who's in which group?
- How will you collect participant cell phone numbers to have on hand for last minute changes?
- How will you collect "special circumstance" information for each advocate (such as an early flight or another meeting to work around)?

Scheduling Process

- What is your timeframe during the lobby day for meetings (i.e., all day, morning only, etc.)? Do you have any midday events that might interfere (a lunch, for example)?
- How will you coordinate advocates between the Senate and House meetings to avoid having them cross the capitol?
- How much time will you leave between meetings? How will you avoid conflicts?
- How will you get all the requests to the relevant schedulers?
- How will you maximize the potential for getting member meetings?
- How will you follow-up? How will you make notes about follow-ups (e.g. if a scheduler tells you they don't schedule until the week before)?
- If more than one person is managing the scheduling, how will you keep everyone up to date?
- For unresponsive offices, will you call directly to staff? If so, when?
- Does your group have any mobility concerns? How will you manage those?
- What time will most participants be leaving? How will you manage participants with earlier flights/travel plans?
- Will subgroups be scheduling meetings on their own? How will you be sure your outreach doesn't conflict with theirs?

1030 15th St. NW Suite 750 West, Washington, DC 20005
AdvocacyAssociates.com info@advocacyassociates.com (202) 349-1030
30,000+ meetings • 30,000+ advocates • 10 years of service

- When will you share schedules? If you share them early, how will you manage questions about “TBD” meetings?
- Will you include Senate “coffees” on the schedule?

Reports

- What schedule details will you need for yourself? Do you need all meetings sorted by time? By state? Do you need individual schedules for specific advocates?
- Will you need printouts of all meetings in individual states for state coordinators? If so, how many for each state?
- Will you have a photographer? Will he or she need a printout of all meetings scheduled with elected officials?

On Site Coordination

- Will you provide paper copies of schedules to advocates? What will you include? How will you organize them for pick-up (e.g. last name, state, or a combination)?
- Will you have an app to keep your advocates informed? What information will that app include? What functionality do you need?
- How will you let advocates know of last minute and day-of changes?
- At what point in your program will you explain the schedules and the process/expectations for a Congressional meeting?
- At what point in your program will you provide an opportunity for groups to coordinate their meetings?
- How will participants be getting from the conference to the meetings?
- Will you have rooms in the House and Senate set-aside for the between meeting use of your participants? How will you get those rooms?

Day-Of

- Who will be the central day-of contact? How will that person convey information about meeting changes to advocates?
- How will advocates communicate with each other?
- How will you facilitate and track social media interactions?

1030 15th St. NW Suite 750 West, Washington, DC 20005
AdvocacyAssociates.com info@advocacyassociates.com (202) 349-1030
30,000+ meetings • 30,000+ advocates • 10 years of service

Materials

- Will you create leave behind packets?
 - What will be in those?
 - How personalized will the packets be? Will they include state-specific information? If so, how will you ensure the materials get to the correct legislators?
 - Will you have separate packets for advocates versus offices?
 - For group meetings, who will you assign to deliver the packet in each meeting?

Post-Event

- How will you gather feedback from advocates?
- How will you encourage follow-up at home?