

Meeting Roles & Outline

Roles in a Lobby Meeting

Leader: Assigns roles before a meeting. Empowers everyone to share and participate, especially constituents. Facilitates agenda transitions. If the leader is not the Liaison, then the leader briefs the Liaison after the meeting.

Appreciator: Expresses gratitude for something the member of Congress has recently accomplished. If possible, a constituent fills this role.

Time Monitor: Asks how much time the member of Congress or staffer has available for the meeting. Signals when a few minutes remain. Monitors the time both CCL volunteers and member or staff are talking with the target of sharing it 50/50. Tallies number of open questions your team asked for the meeting minutes.

Notetaker: Takes notes. If possible, the note taker should be an experienced volunteer. The note taker follows the thread of the conversation, specifically capturing what the member of Congress or staffer says. Reviews notes with others immediately after the meeting to add anything that he/she missed. *Same Day:* types those notes into the online form. Once entered online, shares final notes with others.

Discussion: All lobby team members participate in the discussion, especially the constituents.

Asker: Presents CCL's purpose and asks. Leaves the 1-page primary ask behind. If possible, the asker is a constituent with a strong grasp of our policy and its wider implications.

Deliverer: Brings constituent letters, postcards, or endorsements letters from community leaders. Gives those items to the member of Congress or staffer.

Follow-up: Sends follow-up meeting materials and a Thank You card. If the person doing the follow-up is not the Liaison, he/she should coordinate on the follow-up items with the Liaison soon after the meeting.

The following outline works for an initial meeting with a Congressional office. If you've previously met with your member of Congress or a staffer, then you may want to use the [outline for a follow-up meeting](#).

If you are lobbying with us in DC, you can find additional materials on CCL Community on our "Prepare for Lobby Day" training page: <http://cclusa.org/lobbytoolkit>.

Note: Please modify the outline on the following page as necessary; not all items will make sense for your meeting. We strongly recommend including an **appreciation**, **CCL's primary ask**, and a **supporting ask**.

Initial Meeting Outline

1. **Thank** the member of Congress or staffer for meeting with us.
2. Time Monitor: “**How much time** do you have for this meeting?”
3. **Introduce** yourselves (keep the time in mind). Name, hometown, and what inspires your action on climate. If appropriate, connect by sharing your personal story.
4. Ask the **staffer** to introduce himself/herself.
5. **Show appreciation** for a position the member of Congress has taken or a recent accomplishment.
6. **State our purpose:** “Our purpose is to create the political will for a livable world.”
7. If you have materials to deliver (letters, postcards, or endorsements), have “the deliverer” hand them to the member of Congress or staffer.
8. **Our ask:** “Our ask is that [MOC NAME] support Energy Innovation Act legislation that puts a fee on fossil fuels and allocates the revenue to American households. We have more to say on that later, but first we want to open a dialogue with you.”
9. **Transition into the discussion.**
 - a. Based on your group’s research of local climate impacts, what can you ask the office about climate impacts, renewable energy jobs, business or faith-based leaders in the community?
 - b. “Do you think our current air & water policies reflect good stewardship?”
 - c. “What do you think is the fastest way for the U.S. to lead the world in the clean-energy economy?”
 - d. “What are [MOC’s Name]’s thoughts on the Energy Innovation Act? What might be preventing him/her from supporting our legislation?”
 - e. “Who in our district would we need to convince about the merits of this proposal to win your support?”
 - f. “We have some recent polling data estimates indicating Americans favor action to limit CO2 emissions. Would you like to see what that looks like for our district/state?”

Note: From your research, anticipate what you think your member’s responses might be so you are prepared to ask questions to draw out more information. Listen for the underlying value statements in their responses, acknowledge that value, and connect on common ground. **Try to ask for permission to proceed before giving them information.**

11. Time Monitor signals the team when **five minutes remain** in the meeting.
12. **Our ask:** (hand them a copy of our primary ask) “Our ask is that [MOC NAME] make the climate a bridge issue by supporting the Energy Innovation Act legislation, putting a fee on fossil fuels and returning the revenue to American households. Is that something he/she is willing to do now?”
13. If it becomes clear they cannot commit to your ask, make sure you clearly understand what holds them back and then **offer a supporting ask** (smaller ask that builds towards our main ask).
 - a. “What could we be doing more of in the district to make it easier for you to support this policy?”
14. “Would you like a hard copy or electronic version of additional materials? How and when should I follow up?”
15. **Thank** them for their time.