TPS-DED AAC

Masa Group

Sample Internal Agenda for Engagements

After securing the meeting with a congressional office or government department/interagency, the next step is to prepare for the engagement. By this stage, the attendees from your coalition must be finalized and informed of the upcoming engagement. Here are some proposed methods of communication prior to the engagement to efficiently coordinate pending and upcoming action items:

A. **Schedule a prep call**:
   a. The goal of the prep call is to organize the session and to discuss the logistics and support needed from attendees to keep things moving.
      i. Ensure that individuals are acquainted with other attendees
      ii. Ensure that a common channel of communication exists between the attendees and the organizers
      iii. Ensure that all attendees are informed of relevant dates and deadlines
      iv. Ensure that all attendees are aware of the nature of the meeting - in-person or virtual
   b. The list of attendees representing the campaign comes with differing levels of experience, expertise, and exposure to the campaign's history. A brief overview may be necessary to bring all attendees on the same page regarding the purpose and expectations of the call.
   c. To strategize and prepare for the engagement, follow-up information must be provided for a thorough understanding of the process throughout the session.

B. **Draft an internal agenda to discuss with the attendees**: In order to structure meetings, we propose drafting an internal agenda to guide the sequence of discussion, efficiently utilize time, and for clarity on any asks, queries, or information. Below are some of the preemptive steps to take leading up to the engagement:
   a. Prepare a list of Participants
      i. Ensure that the participant list and bios are available at the beginning of the document, including their pronouns, title, and role.
      ii. The introduction section should include information on the attendee's background on the subject, and how they are involved in the subject area.
   b. Provide a quick overview of the purpose of the meeting
      i. Provide any information, background, and talking points that participants need for the engagement
   c. Define the formal requests that you intend to make during the meeting
      i. Ensure that the proposed recommendations for the member to engage on the issue are clearly communicated
   d. Highlight the issue at hand
      i. Identify categories of the topic for discussion
      ii. Identify individual experts from the attendees list to cover the topic
      iii. Assign roles to attendees to make sure all points are covered in the limited time.
   e. Identify potential issues you can expect
      i. Preemptively discuss ways to address it
   f. Concluding remarks and follow-up: Prepare draft language for the thank you correspondence post the engagement.
      i. Always end by thanking the attendees for their time and attention to the matter.
