



## Trip Planning Worksheets

Visits to the nation's capital are most effective when they are planned in advance, which allows sufficient time to schedule meetings, reserve hotels, arrange transportation, prepare briefing materials, schedule speakers, and secure resources to pay for the trip.

Number of travel days \_\_\_\_\_ Number of days in Washington \_\_\_\_\_

How much money do you or does your organization have available for travel and expenses? \_\_\_\_\_

Do you need to raise additional funds? \_\_\_\_\_

How will you secure the funds for the trip? \_\_\_\_\_

\_\_\_\_\_

Who will take the lead in securing resources or organizing fundraising efforts? \_\_\_\_\_

\_\_\_\_\_

Will each individual be responsible for his or her expenses? \_\_\_\_\_

\_\_\_\_\_

Is there sufficient time to negotiate reduced group rates for travel and hotel? \_\_\_\_\_

\_\_\_\_\_

Who will lead the logistics planning for the trip? \_\_\_\_\_

\_\_\_\_\_

Who will facilitate follow-up communications and confirmations with hotels, Hill offices, attendees, transportation providers, and others? \_\_\_\_\_

\_\_\_\_\_

Do any rooms or catering arrangements need to be reserved? \_\_\_\_\_

\_\_\_\_\_

Will there be a need for floor passes, White House tickets, or tours? \_\_\_\_\_

\_\_\_\_\_

<b>Organization</b>	<b>Address</b>	<b>Telephone</b>
Hotel Information		
Charter Bus Information		
Airline Information		
Consultant Information		
Speaker Information		
Tickets or Tours		

The following worksheet itemizes anticipated expenses for any trip to Washington.

<b>Budget</b>	
<b>Expense Item</b>	<b>Amount</b>
Airfare	
Ground Transportation	
Other Transportation	
Lodging	
Daily Food (Breakfast)	
Daily Food (Dinner)	
Miscellaneous Food	
Presentation Materials	
Entertainment	
Miscellaneous	
Emergency Cash	
Grand Total	

Go to [www.anitaestellblog.com](http://www.anitaestellblog.com) or the official House and Senate sites for a complete list of members of Congress. The House site is [www.house.gov](http://www.house.gov) and the Senate site is [www.senate.gov](http://www.senate.gov). Click on the appropriate menus to find the directories.

The following worksheet allows those planning to meet with members of Congress to track and record their communications for future reference and follow-up. Beyond recording this information, it is very important to build rapport and positive relationships with persons listed on this sheet.

Congressional Office Contact Sheet	
Name of Lawmaker	
Name of Scheduler	
Chief of Staff	
Office Contact E-Mail Address	
Office Telephone	
Political Affiliation	
Contact Log	
Date of Contact	Notes
<i>Reproduce as many copies of this table as needed. You also may download it at <a href="http://www.anitaestell.com">www.anitaestell.com</a>.</i>	

Document and list all persons attending the meeting or making the trip to Washington. You may also wish to create a communications stream through email, Google, LinkedIn, Facebook, or another social network group.

Before going to a meeting with an elected official or his or her staff, role-play with other group members and test yourself on your familiarity with the meeting process and the issues you plan to raise.



## **Resources for Contacting Members of Congress and Congressional Leaders**

In an age of increased transparency, accountability, access to information, and public participation, there are multiple ways to let Congress know what is on your mind. Both the House of Representatives and the Senate have operator assistance and websites to help you directly reach members and their staff.

### **US House of Representatives**

By mail:

The Honorable [Name]

US House of Representatives

Washington, DC 20515

By phone:

(202) 225-3121

Online:

All members and committees: [house.gov](http://house.gov)

Office of the Speaker: [speaker.house.gov](http://speaker.house.gov)

Office of the Democratic Leader: [democraticleader.house.gov](http://democraticleader.house.gov)

Office of the Democratic Whip: [democraticwhip.house.gov](http://democraticwhip.house.gov)

Office of the Republican Leader: [republicanleader.house.gov](http://republicanleader.house.gov)

### **US Senate**

By mail:

The Honorable [Name] US Senate

Washington, DC 20510

By phone:

(202) 224-3121

Online:

All senators and committees: [senate.gov](http://senate.gov)

Democratic leadership: [democrats.senate.gov](http://democrats.senate.gov)

Republican leadership: [republican.senate.gov](http://republican.senate.gov)

### **Contact federal, state and local leaders:**

Two of my favorite sources, [congress.org](http://congress.org) and [votesmart.org](http://votesmart.org), include information on federal, state, and local officials. Type in the constituent ZIP code when you get to each site.

### **Monitor congressional activity:**

Several resources keep citizens apprised of what is happening in Washington. Notices of most events, briefings, floor proceedings, hearings, press conferences, and other events are published in advance. Many proceedings are broadcast on the web and on other media in real time. See the following sources for schedules and access to live coverage of hearings and other proceedings.