

CSH Supportive Housing Week Site Visit Preparation Checklist

ORGANIZATION STAFF	PROPERTY	ON-SITE STAFF	RESIDENTS
Coordination, materials, communications, and follow-up	Physical condition, accessibility, spaces, signage, and environment	Briefings, role prep, talking points, and day-of conduct	Notification, consent, voluntary engagement, and dignity

HOW TO USE

This checklist is organized by time phase (4 weeks out → 2 weeks out → 1 week out → 48 hours / day-of) and by audience track within each phase. Assign a named owner to every item. Tracks are color-coded throughout. Complete all items in each phase before moving to the next.

PHASE 1 — Four Weeks Out

~4 Weeks Before Visit

■ Organization Staff — Coordination & Planning

- ☐ Designate a single **visit coordinator** within the lead organization accountable for overall preparation and communication with the members of Congress.
- ☐ Confirm visit logistics with the member's district office: date, arrival time, duration, number of guests, accessibility needs of the visiting party.
- ☐ Create a preparation checklist and assign a lead responsible for each of the three other tracks – Property, On-site Staff, and Residents.
- ☐ Schedule the four preparation check-in meetings now: 3 weeks out, 2 weeks out, 1 week out, and a final briefing 24 hours before.

■ Property — Initial Assessment & Planning

- ☐ Designate a **tour coordinator** responsible for preparing the physical environment for the congressional visit.
- ☐ Confirm which community spaces will be included in the full tour: lobby, community room, activity spaces, accessible model unit, outdoor areas, dining/kitchen, and any program service rooms.
- ☐ Identify and plan the 3–5 “showcase” spaces that will anchor the tour narrative; begin planning how each will be prepared and presented.

- ☐ Walk the entire proposed tour route end-to-end; document every maintenance issue, accessibility gap, or aesthetic concern in writing.
- ☐ Submit a comprehensive work order list covering all identified issues; set completion deadlines with at least one week of buffer before the visit.
- ☐ Assess and schedule any deep-cleaning needs that exceed routine housekeeping (carpet cleaning, window washing, exterior power washing).
- ☐ Evaluate lighting in all tour spaces — replace burned-out bulbs, identify areas that need supplemental lighting.
- ☐ Assess signage throughout the building: directional signs, accessibility signs, funder acknowledgment displays, and program information boards.
- ☐ Evaluate and update as needed all accessibility features along the tour route: ramps, elevators, automatic doors, grab bars, accessible restrooms, lowered countertops, TTY/visual alarm systems.

■ On-site Staff — Initial Briefing & Role Assignment

- ☐ Designate a **tour host** responsible for working with the lead organization to support staff assignments and on-site communications.
- ☐ Hold an initial kick-off meeting with all staff on-site and explain the purpose of the visit, who the visitor is, and the general timeline.
- ☐ Emphasize that staff should continue normal operations as much as possible — the goal is an authentic picture of the program, not a performance.
- ☐ Identify which staff will be present during the visit and assign preliminary roles (greeter, tour support, resident liaison, note-taker).
- ☐ Open a dedicated channel (group chat, shared folder, or bulletin board) for visit-related updates so all on-site staff stay informed.

■ Residents — Initial Notification

- ☐ Designate a **resident liaison** responsible for drafting materials and communicating with residents in preparation for the site visit.
- ☐ Draft a plain-language resident notification letter explaining: who is visiting, why, when, which areas of the building will be included, and that participation is entirely voluntary.
- ☐ Have the notification reviewed for accessibility: plain language, large print version, easy-read version, and translation into any language spoken by residents.
- ☐ Identify the best distribution method for your population: in-person delivery, mailbox, group text or email, resident meeting announcement, or staff-assisted reading.
- ☐ Review and update consent forms for any residents who may participate; flag any forms that are expired or need renewal.
- ☐ Plan a brief resident Q&A opportunity (at a resident meeting or one-on-one) to answer questions and address any concerns before the visit date.

PHASE 2 — Two Weeks Out

~2 Weeks Before Visit

■ Organization Staff — Materials & Communications

- ☐ Confirm the tour agenda with the district office; share a draft and if there's anything specific the members would like to see and/or learn about not already included.
- ☐ Confirm media, photo, and video permissions with the district office; document the outcome in writing.
- ☐ Draft a [social media post](#) and optional press statement for post-visit release; hold for final approval.
- ☐ Draft leave behind materials for members of Congress providing background on supportive housing and information about the site (a template will be provided in the Supportive Housing Week Toolkit).
- ☐ Confirm any logistical details: parking arrangements, accessible entry for guests, number of leave-behind folders to prepare.

■ Property — Deep Preparation

- ☐ Confirm all Phase 1 work orders are completed or have a firm completion date; escalate any at risk of missing the deadline.
- ☐ Deep-clean all tour-route common areas: lobby, hallways, community room, activity spaces, accessible restrooms, dining area, outdoor spaces.
- ☐ Clean and prepare the accessible model unit (if available) or showcase apartment (if available): remove any personal items left by previous use, refresh furnishings if needed, ensure it is staged to reflect a warm, functional living space.
- ☐ Inspect and service all elevators, automatic doors, and powered accessibility equipment on the tour route; confirm service records are current.
- ☐ Repair or replace any damaged flooring, wall finishes, lighting fixtures, or door hardware along the tour route.
- ☐ Address exterior: parking lot, pathway lighting, landscaping, building entry, and any outdoor community spaces.
- ☐ Update or create directional signage for parking and building entry; order any printed signs that need to be fabricated.
- ☐ Update funder acknowledgment displays as required (HUD, HOME, CDBG, state programs, private funders).
- ☐ Identify and resolve any safety, code, or compliance concerns along the tour route.

■ On-site Staff — Role Preparation & Talking Points

- ☐ Finalize staff role assignments; provide each person with a written description of their specific responsibilities for the visit day.

Task	Assigned To	Done ✓
Tour Host / Lead Narrator	_____	☐
Entry Greeter	_____	☐
Resident Liaison	_____	☐
Community Space Presenter	_____	☐
Accessible Unit Presenter	_____	☐
Program Activity Presenter	_____	☐
Note-Taker / Follow-up Tracker	_____	☐
Safety & Accessibility Monitor	_____	☐

- ☐ Prepare plain-language talking points for each showcase stop on the tour; distribute to relevant staff.
- ☐ Train all staff who will speak during the tour: what their stop covers, how to describe it simply, and how to invite questions.
- ☐ Conduct a practice walk-through of the tour route with all participating staff; time the route and adjust pace as needed.
- ☐ If possible, design and install a “community board” display near the main entrance showcasing resident activities, achievements, and program milestones to help communicate the strength of the community immediately upon entering.
- ☐ Brief all on-site staff (including those not on the tour) on expected visitor arrival time and parking, so they can direct guests if approached.
- ☐ Remind all staff: natural, honest interaction is more effective than rehearsed presentation. The goal is a genuine window into the program.
- ☐ Review privacy protocols with all staff: no resident names shared without consent, no confidential information visible or discussed.

■ Residents — Distribute Notification & Begin Engagement

- ☐ Distribute the resident notification letter through all appropriate channels.
- ☐ Hold a brief, optional resident information session (15–20 minutes at a resident meeting or separately): explain the visit, answer questions, address concerns.
- ☐ Make clear at the information session: residents do not need to do anything differently. The program will continue normally. There is no expectation of participation.
- ☐ Identify residents who express interest in participating voluntarily — meeting the member of Congress, sharing their perspective, or being present in a common area during the tour.
- ☐ For residents who express interest: schedule individual conversations with their case manager or resident liaison to discuss what participation would look like, how long it might take, and what to expect.
- ☐ Confirm and update consent documentation for any resident who may be involved.
- ☐ Assess whether any residents may have anxiety or negative reactions to an unusual event; develop a support plan and identify their preferred staff support person.

PHASE 3 — One Week Out

~7 Days Before Visit

■ Organization Staff — Final Materials & Coordination

- ☐ Finalize the tour agenda and share the confirmed version with the member's district office.
- ☐ Reconfirm visit details with the district office: number of attendees, arrival time, duration, any last-minute changes.
- ☐ Finalize leave behind materials are complete and folders are prepared.
- ☐ Finalize and approve social media post and press statement; hold for post-visit release.
- ☐ Confirm photographer assignment (if member agrees to photographs) and brief them: consent requirements, focus areas, and what is off-limits. Refer to the [social media toolkit](#) for photo and video guidance.
- ☐ Prepare refreshments plan: confirm quantities, dietary considerations, and timing.
- ☐ Send a visit briefing memo to your Executive Director and Board Chair summarizing: agenda, participants, tour narrative, and any notable sensitivities.
- ☐ Confirm emergency and contingency plan: who to contact if a resident health situation arises, if the member is significantly delayed, or if the visit needs to be shortened.

■ Property — Final Walkthrough & Detail Work

- ☐ Conduct a formal pre-visit property walkthrough with the **visit coordinator** and **tour route coordinator**; walk the complete tour route as a visiting guest would experience it.
- ☐ Verify completion of all previously identified work orders; submit emergency work orders for any new issues discovered.
- ☐ Perform a detailed inspection of all showcase spaces: lighting, cleanliness, furnishings, displayed materials, and any planned activity setups.
- ☐ Test all elevators, automatic doors, and accessibility equipment on the tour route; confirm operational.

- ☐ Confirm that all signage is installed: directional, accessibility, funder acknowledgment, community board, and organizational identity at entry.
- ☐ Inspect all accessible restrooms on the tour route: supplies stocked, fixtures clean and functional, grab bars secure.
- ☐ Confirm outdoor and parking areas are clean, lit, and accessible; reserve parking spaces for the visiting party and mark clearly.
- ☐ Arrange any furniture in community spaces to facilitate the planned activity or presentation; confirm setup plan with on-site staff.
- ☐ Identify a staff-only staging area for materials, coats, and refreshments — keep this out of the visitor's sightline.

■ On-site Staff — Final Briefing & Dry Run

- ☐ Hold a full-staff final briefing covering: visit purpose, tour agenda and timing, individual role assignments, resident privacy protocols, and what to do if an unexpected situation arises.
- ☐ Conduct a complete dry run of the tour with all participating staff in their assigned roles; time each stop.
- ☐ Refine talking points based on the dry run; distribute final versions in writing to each presenter.
- ☐ Practice the opening welcome (2 minutes maximum) and closing conversation facilitation.
- ☐ Prepare a quick-reference card for each staff participant: their role, their stop, key talking points, and emergency contacts.
- ☐ Confirm all staff know the expected arrival time and where to be positioned at that time.
- ☐ Brief front desk, security, and any staff not directly on the tour about the visit: who to expect, where to direct them, and how to respond to questions.
- ☐ Confirm a communication plan for the day: how will staff reach each other during the tour if needed (radio, phone, text, in-person signal)?

■ Residents — Individual Preparation for Volunteers

- ☐ Confirm final list of residents who wish to participate in any form (brief conversation, presence in a common area, sharing their perspective with the member).
- ☐ For each participating resident, hold a one-on-one preparation conversation with their case manager or preferred staff member. Cover: who the visitor is and why they are here, what the resident's participation will look like, how long it will last, what kinds of questions might come up, and that they can step back at any point with no consequence.
- ☐ Do not script what residents say. Authentic voice is the point. Preparation should build confidence and comfort, not produce a rehearsed message.
- ☐ Identify a staff support person who will remain with each participating resident throughout their involvement.
- ☐ Confirm updated consent documentation for all participating residents.
- ☐ Send a brief reminder to all residents (not just those participating) that the visit is taking place next week; reiterate that normal routines continue, and nothing is required of them.
- ☐ Identify any residents who have expressed concerns or anxiety about the visit; confirm their support plan is in place.

PHASE 4 — 48 Hours & Day of Visit

Final 48 Hours Through Visit End

48-HOUR RULE

At this stage, the work of preparation should be largely complete. The 48-hour window is for verification, final details, and ensuring every person involved feels calm, clear, and ready. Avoid introducing new elements or making significant changes to the plan at this stage.

■ Organization Staff — 48 Hours Out

- ☐ Confirm the visit is still on with the member's district office; clarify any last-minute changes to attendees or timing.
- ☐ Confirm final guest count; add or remove leave-behind folders accordingly.
- ☐ Brief Executive Director and Board Chair with a final one-page summary of the visit agenda, participants, key narrative points, and any sensitivities.
- ☐ Confirm photographer is briefed and available.
- ☐ Confirm post-visit social media and press statement are drafted, approved, and held for release.

■ Property — 48 Hours Out

- ☐ Conduct a final walkthrough of the complete tour route; document anything that still needs attention.
- ☐ Confirm all showcase spaces are set up and ready; do not rearrange after this point except for minor details.
- ☐ Verify elevator, automatic door, and accessibility equipment function; report any issues immediately.
- ☐ Confirm outdoor areas, parking, and entry are clean and ready.
- ☐ Confirm reserved parking is clearly marked for the visiting party.

■ On-site Staff — 48 Hours Out

- ☐ Distribute final printed quick-reference cards to all participating staff.
- ☐ Hold a brief final Q&A for any staff questions or concerns; address any remaining uncertainty about roles.
- ☐ Confirm all staff know exactly where to be and when on the day of the visit.
- ☐ Remind staff: if a resident becomes distressed or a difficult situation arises during the tour, the safety and comfort of residents take absolute priority. Know the protocol.

■ Residents — 48 Hours Out

- ☐ Deliver a brief, friendly visit reminder to all residents through preferred channels: "Reminder: our congressional visitor arrives on [day]. Normal routines continue as usual. If you have questions, speak with [name]."
- ☐ Check in individually with all residents who have agreed to participate: confirm they still feel comfortable, answer any last questions, confirm their support person assignment.

- ☐ Confirm that residents who do not wish to participate know their options: staying in their unit, using alternate common areas during the tour, or simply going about their day as normal.
- ☐ Verify that any resident with a support plan for anxiety around the visit has been checked in with and the plan is activated if needed.

■ Organization Staff — Morning of Visit

- ☐ Confirm visit is still on with the district office by 9:00 AM.
- ☐ **Visit coordinator** does a final check-in with **tour coordinator**, **resident liaison**, and **tour host** to ensure everyone is ready and address any last-minute questions or changes.
- ☐ Leave-behind folders are assembled, complete, and at the greeting point.
- ☐ Refreshments are set up in the designated space.
- ☐ Note-taker is prepared with a notepad or device to capture questions, observations, and any follow-up commitments made during the visit.

■ Property — Morning of Visit

- ☐ Re-walk the tour route by 8:00 AM; address any overnight issues (litter, spills, lighting outages).
- ☐ Confirm all showcase spaces are clean, lit, and set up as planned.
- ☐ Ensure the community board/outcomes display is properly mounted and visible.
- ☐ Set up refreshments in the designated space.
- ☐ Confirm the greeter station at the main entrance is ready 30 minutes before arrival.

■ On-site Staff — Morning of Visit

- ☐ All tour-participating staff are in position at least 30 minutes before scheduled arrival.
- ☐ Entry greeter stationed at main entrance; leave-behind folders at the greeting point.
- ☐ All staff have their printed role card and talking point reference.
- ☐ Confirm communication plan is active (radio, phone channel, or designated hand signal).
- ☐ Take a genuine, relaxed breath. The preparation is done. Be present, be warm, be yourselves.

■ Residents — Morning of Visit

- ☐ Resident liaison checks in briefly with each participating resident before the visit begins: how are they feeling, any last questions, confirmed their support person is nearby.
- ☐ Non-participating residents have been reminded that the tour is today and that their space and routines are respected.
- ☐ Staff support people are positioned near participating residents and know the signal if a resident wants to step away.

AFTER THE VISIT — Same Day & Following Week

Visit Day Through Day +7

■ Organization Staff — Follow-Up & Documentation

- ☐ Send thank-you letter from CEO/Board Chair to the member's office within 24 hours (a template will be provided in the Supportive Housing Week Toolkit).
- ☐ Release approved social media post and/or press statement.
- ☐ Provide any follow-up materials or information requested during the visit within one week.
- ☐ Be sure to maintain notes summarizing the visit: attendees, impressions, questions asked, and follow-up commitments.
- ☐ Compile the note-taker's record into a clean summary; distribute internally.
- ☐ Hold debrief: What did the member or staff respond to most? What would we do differently? What is the status of the relationship going forward?

■ Property — Restore & Debrief

- ☐ Thank staff for their support and participation.
- ☐ Return all common areas to normal configuration after the visit.
- ☐ Note any property issues that surfaced or were observed during the visit; submit follow-up work orders.
- ☐ If set up, retain the "community board" to continue to celebrate the strength of your work even after the visit

■ On-site Staff — Debrief

- ☐ Hold a brief on-site staff debrief within 24 hours: What worked well? What was awkward or unclear? What would we change?
- ☐ Acknowledge and thank every staff member who contributed to preparation and the visit day.
- ☐ Document any questions the member or their staff asked that staff could not answer fully; flag for visit coordinator follow-up.

■ Residents — Follow-Up & Recognition

- ☐ Personally thank every resident who participated in any way — their contribution is meaningful and should be named.
- ☐ Share a brief, plain-language summary with all residents: how the visit went, what the member observed and said, and what happens next.
- ☐ Check in with residents who had support plans for anxiety or stress: How are they feeling post-visit?

ASSIGNMENT TABLE

Assign a named staff person to each role. Review at every preparation check-in.

Task	Assigned To	Done ✓
Visit Coordinator (lead organizational contact for entire preparation)	_____	☐
Tour Coordinator (property & physical environment)	_____	☐
Tour Host / Lead Narrator	_____	☐
Entry Greeter	_____	☐
Resident Liaison	_____	☐
Community Space Presenter	_____	☐
Accessible Unit Presenter	_____	☐
Program Activity Presenter	_____	☐
Note-Taker / Follow-up Tracker	_____	☐
Safety & Accessibility Monitor	_____	☐
Congressional Staff Point of Contact	_____	☐
Photographer	_____	☐
Press / Social Media Contact	_____	☐
Materials & Folder Handler	_____	☐
Refreshments Coordinator	_____	☐
Logistics & Parking Coordinator	_____	☐
Executive Director / CEO (closing conversation)	_____	☐
Board Chair (if attending)	_____	☐

NOTES & OPEN ITEMS