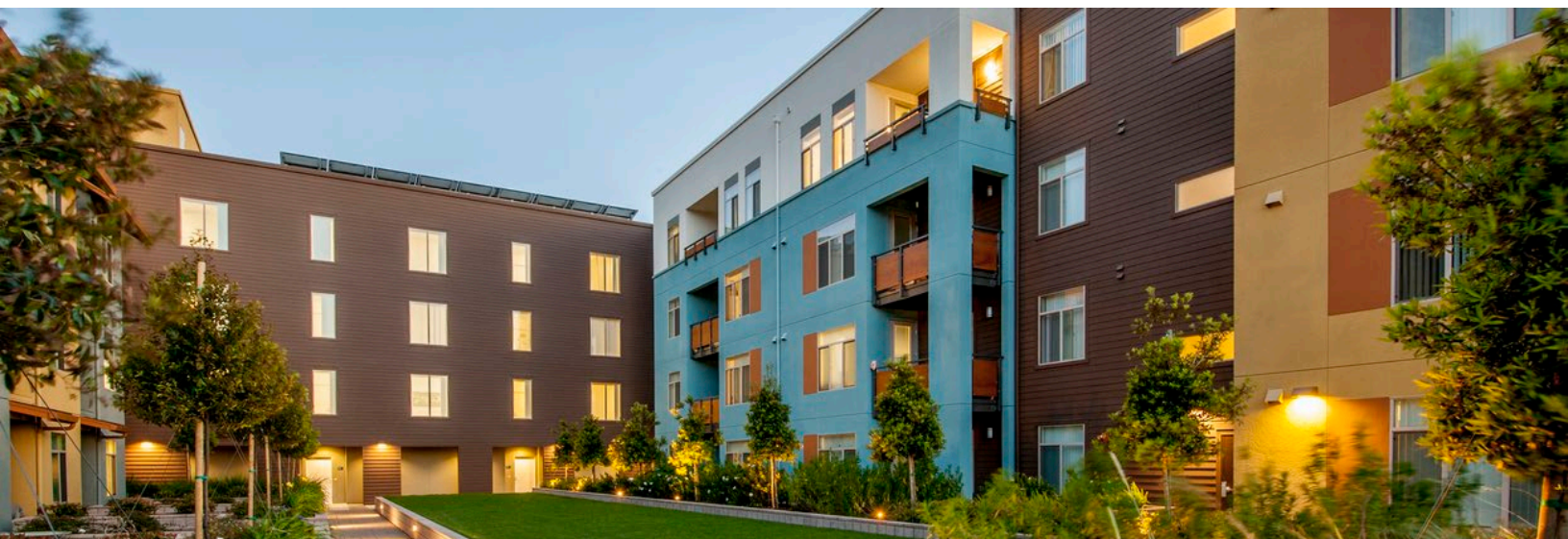


INVITATION AND SCHEDULING

WK 1-2		
June 1 – 14		
☐	Identify which site	Determine which properties are best for the target tour with your member of Congress; select the site; confirm with program and property staff that there is no reason that site should not be used for a tour during the target week.
☐	Finalize your tour invitation letter	Review and finalize your customized invitation letter using the CSH template. The letter should include who you are, what you are inviting the member to see, why it matters to their constituents, and proposed dates during the week of August 24–28.
☐	Identify proposed tour dates	Identify 2–3 date/time options August 24–28 that work for your property and staff. Having schedule options makes it easier for a scheduler to say yes quickly.
☐	Identify your site tour lead	Confirm who on your staff will own the tour coordination — the person who will track RSVPs, manage logistics, and be the primary contact for the member's office.
☐	Assign responsibilities	Assign responsibilities related to tour preparation, site preparation, resident engagement and communication, materials development, internal and external communications and follow-up to staff; be sure all assignments are clear.
☐	Send all tour invitation letters	Send your finalized invitation letter to the district/state director and the housing legislative aid, copying the scheduler for the target member. Send by email and follow up by phone within 2 business days of sending. Confirm receipt.
☐	Log each invitation sent	Record in your notes: date sent, method (email/mail), scheduler name, phone number, and date of follow-up call.
☐	Make initial follow-up calls	Call the district office to confirm the invitation was received and to introduce yourself. Keep it brief: who you are, what you sent, and that you'll follow up again next week if you haven't heard back.
☐	Check in on property readiness	Walk the property and identify any areas needing attention or of concern; determine the tour route; note parking and any possible accessibility issues.

WK 3	June 15 – June 21	
☐	Follow up with all offices of targeted members	Call or email each scheduler who has not yet responded. Be persistent but professional — one follow-up per week is standard. Note any responses received and report on your check-in call.
☐	Learn about your target member	Review information about the member so you understand natural touchpoints with supportive housing and shared values important to the member.
☐	Determine aligned interests	Determine what framing will best suit your member; identify which facts are needed to backup that discussion.
☐	Attend CSH webinar (June 18)	Attend the CSH webinar to learn more about Supportive Housing Week
WK 4	June 22 – June 28	
☐	Continue follow-up; log all responses	Follow up again with any outstanding member's offices. Log all responses — confirmed, declined, or no response.
☐	Handle declines or non-responses proactively	If a member has declined or has not responded, offer a tour to the chief of staff, district manager or other staff person in lieu of the member.
☐	Source needed information	Determine sources to gather the local information to engage the member in supportive housing; begin to gather facts; determine what issues are important to the member to find ways you can connect those issues to the positive outcomes associated with supportive housing.
☐	Confirm staff roles for tour day	Identify and assign the following roles: greeter, program presenter, tour guide, resident liaison, and photographer (if applicable).



CONFIRMATION & PREPARATION		
WK 5	June 29 – July 5	
☐	Confirm tour date(s) in writing	For any member who has verbally agreed, follow up with a written confirmation email that restates the date, time, location, and your contact information. Get a written reply. Do not assume verbal confirmation is enough.
☐	Develop resident consent plan	Confirm the consent process timeline; develop consent form.
☐	Review nonpartisan framing guide	It is essential all messaging be conducted in a nonpartisan way. As you prepare to develop your message framing, be sure to review the CSH nonpartisan framing guide. This guide should inform the printed materials as well as talking points. Your talking points should be framed around shared values — cost savings, public safety, housing stability — regardless of the member's party.
☐	Gather the facts	Continue compiling local or federal information to further engage the member in why supportive housing is aligned with their interests; review for pertinence to local situation(s).
WK 6	July 6 – July 12	
☐	Develop run-of-show	Develop a tour run-of-show and share with CSH for feedback.
☐	Compile information	Gather the local and federal information you have compiled to support your case for supportive housing. Prioritize information based upon nonpartisan framing and member priorities. Determine printed materials to be created.
☐	Identify resident participation	Identify residents possibly interested in participating; assign staff to approach residents and inquire as to interest.
☐	Prepare staff briefing	Schedule a brief internal meeting (before the end of July) to walk your team through the tour plan. Everyone with a role should know it before the dry run.
WK 7	July 13 – July 19	
☐	Complete resident consent forms	All signed resident consent forms should be collected by the end of this week. No resident should be asked to interact with a member without a signed form.
☐	Develop tour briefing packet	Edit the tour briefing packet. Use the CSH templates: include organization overview, program outcomes, resident demographics, cost-savings data, and pertinent local information.

WK 8	July 20 – July 26	
☐	Finalize tour run of show	Your run-of-show should now be detailed enough so that any staff member could follow it on tour day. Every stop has a time, a speaker, and a talking point.
☐	Frame the message	Conceptualize how to frame a discussion of supportive housing around the information gathered, focusing on the member's priorities and concerns.
☐	Reconfirm tour logistics	Contact the legislative office to reconfirm date, time, how many staff will attend, any accessibility or dietary needs, parking/entry instructions. Put all confirmed details in writing. Inquire if they would like the press engaged in the event.



FINAL PREPARATION		
WK 9	July 27 – August 2	
☐	Complete internal staff briefing	Walk your full tour team through the run-of-show. Assign every role explicitly. Address questions and logistics gaps. Everyone should leave knowing exactly what they are doing on tour day.
☐	Confirm all logistics are locked	Review the full run-of-show one final time. Confirm: tour route is set, staff roles are assigned, resident participants are confirmed, printed materials are ready, consent forms are signed.
☐	Finalize draft of briefing materials	Finalize the content on printed materials and agree upon visual presentation of the materials – what graphics or images are needed; how will the information be most easily interpreted by the recipient.
☐	Check in on social media plan	Confirm your social media approach: will you post during or after the tour? Do you have photo consent? Do you have the campaign hashtag #SupportiveHousingWorks? Prepare draft captions using CSH templates.
☐	Attend CSH's messaging webinar	CSH will walk folks through its new Messaging Roadmap to help you talk about why supportive housing works with your members of Congress.
WK 10	August 3 – August 9	
☐	Finalize site preparation plan	Walk the tour route one more time. Confirm: signage in place, accessibility clear, common areas presentable, any construction or access issues resolved. Note anything that needs to be addressed before August 24.
☐	Confirm staff availability for tour day	Reconfirm that every assigned staff member is available and prepared for their role on tour day. Identify a backup for any critical role in case of absence.
☐	Conduct 30-minute dry run of tour	Walk through: arrival sequence, welcome script, tour route, resident interaction moment, and close. Get direct feedback and revise.
☐	Review your talking points	Familiarize yourself with the data so you can converse with the member about supportive housing in an informed, data-driven manner. Prepare for questions and how to address possible objections.
WK 11	August 10 – August 16	
☐	Reconfirm tour — two-week check	Contact the legislative office to reconfirm the tour — date, time, number of attendees, and any last-minute changes. This is the standard two-week-out confirmation in congressional scheduling. Do not skip it.
☐	Complete all site preparations	Any physical site preparation should be complete by end of this week. Do not leave property logistics to the last day.
☐	Finalize briefing materials	Review and finalize all briefing materials being internally generated; get approval to print.

☐	Prepare the tour day briefing folder	Once printed materials are received, assemble a single folder for tour day that contains final run-of-show, printed materials for the member, staff role cards and emergency contacts.
☐	Final staff briefing	Hold a final all-hands briefing for tour day staff. Walk through the run-of-show in order. Confirm each person's role, timing, and what to do if something goes off plan.
☐	Social media content approved	Have all social media content (pre-tour, day-of, and post-tour) drafted, reviewed, and approved by your communications lead. Pre-schedule what you can.
☐	Draft post-tour letter	Using CSH template, draft a post-tour letter to send to member.
☐	Emergency plan confirmed	Identify what happens if the member cancels at the last minute. TIP: If member cancels, offer the tour to one of his/her staff.
WK 12	August 17 – August 23	
☐	Reconfirm tour — one-week check	Call the scheduler one final time to reconfirm all details for the upcoming visit. Get a final headcount (including names and titles) of staff attending. Confirm the entry point and parking for the member's vehicle.
☐	Tour day folder reviewed and ready	Review your tour day folder one final time. Everything should be printed, labeled, and organized. Brief your greeter on the exact arrival protocol.
☐	Staff on-call and available	Confirm that all tour day staff are available tomorrow. Any absences must be covered by the backup plan confirmed in Week 10.
☐	Resident participants checked in	Have a brief, relaxed conversation with any resident who is participating tomorrow. Reconfirm they are comfortable and remind them they can choose not to engage at any point.
☐	Brief participating residents — final	Have a brief, casual conversation with any resident who will interact with the member. Make sure they feel comfortable, understand the visit, and know they can choose not to participate at any time.
☐	Post-tour letter ready to send	Finalize the draft follow-up letter with only the tour-specific details needed to be filled in. Set a reminder to send within 48 hours of the tour.

CAMPAIGN WEEK		
WK 13	August 24 – August 30	
☐	Day-before confirmation call	Call the scheduler the day before the tour to reconfirm everything: time of arrival, number of staff, any last-minute changes. Keep it brief and professional. – NOTE if this should be done on Friday the week prior.
☐	Day-before final preparations	Be sure all tour participants have their relevant swag.
☐	Day-before final preparations	Be sure all materials for the members are prepared and on hand.
☐	Host your member tour	Execute your tour using your confirmed run-of-show. Greet the member warmly, deliver your program overview, walk the property, facilitate the resident interaction, present your outcomes data, and close with a clear next step. If members' staff approve, take photos of member with key housing staff and residents who agreed to participate.
☐	Offer to be a resource for the member and their office	Offer yourself and agency as a topic expert whenever something related to supportive housing arises.
☐	Capture the member's response	After the tour, immediately write down: What did they say about the visit? Did they make any pertinent statements about intent? What follow-up did they offer? What questions did they ask that you couldn't fully answer?
☐	Post social media content	Post your prepared social media content including approved photo during or immediately after the tour. Use the campaign hashtag and tag CSH. If the member's office has agreed to be tagged, include them.
☐	Send post-tour follow-up letter	Send your follow-up letter within 48 hours of the tour. Include: a brief summary of what they saw, your key program data, and a specific next step or offer. Be sure to thank the member for their time.
☐	Complete post-tour debrief template	Fill out and share the post-tour debrief template with CSH within 48 hours. This is the record of what happened and will feed into CSH's campaign impact report.
☐	Celebrate and thank	Celebrate that you have conducted an essential engagement with your member. Thank your staff for their hard work. Thank all residents that participated.

DEBRIEF & FOLLOW-UP		
WK 14	August 31 – September 6	
☐	Develop year-round touchpoint plan	After you have had a moment to celebrate, but before you move on to other things, determine what you will send to the member, or their staff, over the next 12 months to keep the relationship warm – program updates, resident outcome data, a follow-up site visit invitation for next year, etc. Write it down and calendar it.
☐	Send post-tour impact summary	If you have not already done so – should really be done within 48 hours of the tour – send a brief post-tour summary to the legislative office: what the member saw, what it means for their district, and what you are asking them to do. Keep it to one page.
☐	Submit outcomes report and feedback to CSH	Complete the CSH campaign outcomes form: tour date(s), member(s) hosted, party, comments made, media generated, and any follow-up meetings scheduled. Provide recommendations and insights for Supportive Housing Week 2027.

