

**Template Site
Visit Packet**

Appendix

H12



Site Visit Packet

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Thank you so much for being an important part of [ORGANIZATION SITE VISIT EFFORTS]. Site visits are, quite simply, the single best way to help elected officials and their staff understand the connections between D.C./State Capitol policy issues and what’s happening in their district. And they don’t have to be an arduous undertaking—especially with the [ORGANIZATION] Government Relations team standing ready to help! In fact, there are just five steps to putting together a successful event:

Step One: Let the [ORGANIZATION] Government Relations team know that you are willing to conduct a site visit. They are eager to help in any way—from brainstorming ideas to drafting materials to helping you work with policymaker’s offices. Contact them at [CONTACT].

Step Two: Develop a plan. What would you like to show the elected official and/

or staff person? Who should attend? What issues are important to your organization’s ability to provide service to your community?

Step Three: Issue the invitation. Provide the details of your proposed visit in a short letter of invitation which you can fax or e-mail to the district office. Follow-up with a phone call and get the planning process underway!

Step Four: Conduct the visit: Once everything’s arranged, conducting the visit is almost the easiest part. You’ll need to remain somewhat flexible, however, in case of unforeseen scheduling conflicts or other problems.

Step Five: Follow-Up: Let the Government Relations team know how the visit went and whether the elected official and/or staff person raised any questions that need a response. We can also assist with additional follow-up ideas to help build a lasting relationship with the office.

We have included in this packet all the materials you’ll need for an effective visit. Your participation in this effort could make all the difference in our policy goals. Please do consider putting together a brief visit during the upcoming recess—and let us help!

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Top Ten Ideas for Site Visits

[DEVELOP A LIST OF VERY SPECIFIC IDEAS FOR SITE VISITS BASED ON YOUR ORGANIZATION'S UNIQUE CIRCUMSTANCES AND POLICY INTERESTS]

Checklist for Setting up a Site Visit

Step One: Pre-Planning

- Read through the materials we've provided at [WEB SITE].
- Let Government Relations know of your willingness to participate and request that a time be set up for a personalized discussion on developing a winning site visit plan. [CONTACT]

Step Two: Planning the Visit

- Who will you invite to the visit? Consider these options
 - Member of Congress/State Legislature
 - Staff person
 - District Staff
 - Legislator first and then staff person if the Member is unavailable
- What will you show them? (*hint: see 10 ideas for great site visits*). How does what you're showing them relate to our policy agenda? What services do you provide to the community?
- Who else will you have at the event? Elected officials and their staff like to

meet "real people" (i.e., employees, beneficiaries).

- Consider inviting the media (but only in coordination with the elected officials' office)
- Put the plan in writing (see samples, on pages)
- Schedule a meeting/phone call with internal personnel who will be involved with the visit to ensure the plan—and any related advocacy messages—are clear.

Step Three: Invitation

- Check [ORGANIZATION ACTION CENTER OR WWW.CONGRESS.ORG] to identify your specific elected officials.
- Use our template to develop an invitation letter for your Member of Congress or a staff person.
- Use [ORGANIZATION ACTION CENTER OR WWW.CONGRESS.ORG] to find the district office phone number for your elected officials. For those with multiple offices, choose the closest one to where you plan to hold the site visit.
- For invitations for MEMBERS ONLY: Call the office and ask for the district scheduler. Tell him/her you would like to send an invitation and ask the best way to send it (some offices prefer fax, others e-mail).
- For invitations for DISTRICT STAFF: Call the district office and ask for the staff person who handles our policy issues. Speak with them directly and follow-up with an e-mailed invitation, if necessary.
- For invitations for D.C. STAFF (who often visit the Congressional district or state during the district work periods): Call the D.C. office and ask for the staff person who handles our policy issues.

Speak with them directly and follow-up with an e-mailed invitation, if necessary.

- Follow-up on all invitations sent with additional phone calls/e-mails until the visit is scheduled.

Step Four: Conduct the Visit

- Coordinate with internal staff the day before the visit.
- Prepare a one page document telling your organization's story and being sure to include basic facts, including [DETAILS ON BASIC FACTS TO HAVE IN HAND].
- Review talking points provided by Government Relations to prepare to discuss important policy issues with your elected officials.
- Review the plan to ensure all timeframes are reasonable and to develop contingency plans (if necessary).
- Have back-up plans in case of bad weather, transportation breakdowns or other snafus.
- Assign an internal staff person the task of taking pictures during the visit, as well as taking notes on what the elected official or staff person expressed the most interest in.

Step Five: Follow-Up

- Send a "Thank You" letter to the elected official's office.
- Send pictures from the visit to the elected official's office.
- Follow-up on any questions raised with additional information.
- Follow-up on any potential media inquiries (after working with the elected official's office).
- For Federal legislators and staff: Consider asking the elected official to submit

a statement for the Congressional Record about the visit.

- Report back to the Government Relations team about how the visit went.
- Maintain regular contact with the member and their staff.

Frequently Asked Questions about Site Visits

What's a site visit?

A "site visit" is an in-person visit by an elected official or member of his or her staff to the policy organizations in their district or state. These visits are invaluable to helping an elected official understand the impact of proposed policies on organizations in his/her district.

When's the best time to schedule a visit?

For Federal: Members of the U.S. House and Senate spend a considerable amount of time "at home" during what's known as "district work periods" or "recess." You can access the schedule for the House here and for the Senate here.

For State: Include links to state calendars.

Do only elected officials attend site visits?

Actually, it can be very effective to have a staff person take a site visit before you ask his or her boss. That way, assuming you make the visit as interesting as possible, you can turn the staff person into an advocate for future visits. Elected officials often make decisions about where they might spend their time based on a positive experience their staff person may have had. In addition, the staff people are very influential in terms of the

policy decisions made in the office—getting them up to speed is always a good idea.

How do I set up a site visit?

All the information you need for setting up a site visit, including a checklist, sample agendas and template invitation letters, can be found in this packet.

Sample Site Visit Agendas

**SAMPLE SITE VISIT PLAN (Facility Tour)
1.5 hour visit**

10:00 AM to 10:15 AM	Greet Congressperson/Staff at front office
10:15 AM to 10:45 AM	Facility tour
10:45 AM to 11:15 AM	Meeting in conference room with employees for informal remarks and Q&A (with snacks!)
11:15 AM to 11:30 AM	Wrap-up/final questions and comments from elected official

SAMPLE SITE VISIT PLAN (Board/Supporters Meeting) 1.5 hour visit

10:00 AM to 10:15 AM	Greet Congressperson/Staff at front office
10:15 AM to 11:15 AM	Meeting in conference room with board and/or supporters. Develop an agenda that allows them to highlight the value of the organization in the community.
11:15 AM to 11:30 AM	Wrap-up/final questions and comments

**SAMPLE SITE VISIT PLAN (Partner Tour)
1.5 hour visit**

10:00 AM to 10:30 AM	Greet Congressperson/Staff at front office. Brief organization tour.
10:30 AM to 11:15 AM	Load trucks/carts and drive to partner facilities. Coordinate with partners on the policy message.
11:15 AM to 11:30 AM	Reconvene at office for refreshments and Q&A with employees

Draft Invitation Letter for Member of Congress/State Legislator

[DATE]

The Honorable [FULL NAME OF REPRESENTATIVE HERE]

Address

City, State, Zip

Dear Representative/Senator [LAST NAME]:

As a representative of [ORGANIZATION] in your district, I write today to invite you to visit [NAME OF ORGANIZATION], which is located in [CITY, STATE]. Specifically, we hope that you might be available [THE WEEK OF/SPECIFIC DATE] for a brief [TOUR/MEETING WITH EMPLOYEES]. By way of background, our organization serves [INFORMATION ON EMPLOYEES/SUPPORTERS] in the community. Our mission is to [FILL IN MISSION HERE, IF APPLICABLE].

We are eager to show you our work in providing [DETAILS ON WHAT ORGANIZATION DOES]. In particular, we would like to [FILL IN DETAILS OF VISIT HERE—I.E., “SHOW YOU OUR FACILITY” OR “HAVE YOU JOIN US FOR AN ALL EMPLOYEE MEETING”].

As you know, the federal/state government is an important partner in our efforts to provide [DETAILS ON HOW GOVERNMENT POLICIES IMPACT THE ORGANIZATION’S ABILITY TO PROVIDE SERVICES].

Upcoming debates in Congress/State legislature on [POLICY ISSUES] will have a dramatic impact on our organization. We would welcome the opportunity to discuss these potential impacts further—and provide needed background and resources for your office on these important issues.

Thank you in advance for your consideration. To set up a visit, or if you have any questions, please contact [CONTACT INFORMATION].

Sincerely,

Draft Invitation Letter for Staff

[DATE]

Name

Title

Address

Washington, DC [ZIP CODE]

Dear [NAME]:

As a representative of [ORGANIZATION] in your district, I write today to invite you to visit [NAME OF ORGANIZATION], which is located in [CITY, STATE]. Specifically, we hope that you might be available [THE WEEK OF/SPECIFIC DATE] for a brief [TOUR/MEETING WITH EMPLOYEES]. By way of background, our organization serves [INFORMATION ON EMPLOYEES/SUPPORTERS] in the community. Our mission is to [FILL IN MISSION HERE, IF APPLICABLE].

We are eager to show you our work in providing [DETAILS ON WHAT ORGANIZATION DOES]. In particular, we would like to [FILL IN DETAILS OF VISIT HERE—I.E., “SHOW YOU OUR FACILITY” OR “HAVE YOU JOIN US FOR AN ALL EMPLOYEE MEETING”].

Knowing of your role in advising [REPRESENTATIVE/SENATOR XX] on our policy issues, we believe the visit might provide needed insights into the impacts of certain federal/state policies on organizations like ours in your district/state.

As you know, the federal/state government is an important partner in our efforts to provide [DETAILS ON HOW GOVERNMENT POLICIES IMPACT THE ORGANIZATION’S ABILITY TO PROVIDE SERVICES]

Upcoming debates in Congress/State legislature on [POLICY ISSUES] will have a dramatic impact on our organization. We would welcome the opportunity to discuss these potential impacts further—and provide needed background and resources for your office on these important issues.

Thank you in advance for your consideration. To set up a visit, or if you have any questions, please contact [CONTACT INFORMATION].

Sincerely,