

HOSTING AN INSPIRING SITE VISIT

Before the Visit:

- ✓ *Identify your candidates/legislators.*

Identify these targets and collect their contact information. In many cases, a candidate may have a scheduler.

- ✓ *Invite your representative for a site visit.*

You should send your site visit invitation several weeks prior to your preferred visit date. The invitation should be personalized with specific information about your program and should include a window of time during which you would like them to visit. The invitation should then be emailed to the candidate/elected official.

- ✓ *Follow up with the candidate/representative or their scheduler.*

If you are coordinating a visit with a state legislator or candidate, follow up with them within a day or two to make sure they received the invitation. You may need to work directly with the legislator to settle on a date and time, as most state office holders do not have a scheduling staff. Most candidates have scheduling or other staff that can help get the site visit on their calendar.

- ✓ *Coordinate with candidate's/representative's communications staff.*

It is up to the candidate or elected official whether or not the press should be involved. If media coverage is agreeable with them, you'll want to produce media materials well in advance of the visit as it can often take days for a legislator to approve materials.

- **Media Advisory:** A brief written notice to media about an upcoming event or announcement. The advisory will concisely list the date, time, location, purpose of the event or announcement, participants and contact information. Advisories are typically a page or less in length, and should be circulated to the press, including the photo editor of the local newspaper, within five business days of the event or announcement.
- **Press Release:** A written communication announcing news that is sent to media. Usually contains a point of contact for further media inquiries or requests, and quotes from those associated with the news. The release should be put on letterhead and be approved by the elected official prior to distribution. The release should be circulated to the media as soon as the visit begins.
- **Photo Release:** Similar to a press release, a picture from the event or announcement that is released to the press for publication. Should include a photo credit and brief caption that identifies people in the photo. In this case, the photo should include the candidate/elected official meeting with program leadership, volunteers if pre-approval has been received, and must be approved by the elected official prior to distribution. The photo should be circulated to the media and/or sent to photo editors at target publications as soon as the visit concludes.

In addition to these media tactics, the candidate's/elected official's visit should be featured on social media and on your program's website along with a brief write-up and photo.

- ✓ *Create a takeaway materials for the candidate/legislator.*

Provide the candidate/legislator with materials to take away from the visit that clearly communicate your program's role in the community. Try to create a documents that communicate your effectiveness in the community in a direct and deliberate manner. This can include a summary of your footprint in the district, the populations you reach, and the services you provide.

Other good materials to share would be success stories and testimonials from those who have served or those who receive services from your program. All materials should be sent with the legislator following the visit.

- ✓ *Notify staff and employees about site visit.*

Employees and staff should be informed of the visit and your expectations. The more prepared everyone is, the better the visit!

- ✓ *Perform walk-through the day before the site visit.*

The route should be mapped out so that the event and tour run smoothly and on time. A walk-through the day prior to the event is recommended to ensure that all participants understand their roles, know the purpose of the visit, are aware of the route that will be taken in and around the building and know how much time they will be allotted for their portion of the presentation.

This is also a good time to review messaging. Present any site visit participants with a schedule and a key messages document.

- ✓ *Issue media advisory and press release.*

Within five business days in advance of the visit, issue the media advisory to the press, including the photo editor of the local newspaper. Follow up with a phone call and a reminder e-mail the day of the event.

During the Visit:

- ✓ *Greet the candidate/legislator and/or their staff. (2-3 minutes)*

Welcome the candidate/elected official and make introductions. Preferably, one or two employees from your program should also be on hand. You may want to consider including a representative from one of your community partners who understands how vital your work is to the local community and state. Following brief introductions, the tour should promptly begin.

- ✓ *Tour your facility. (20 minutes)*

This is the best time to show your work "in action" to the candidate/elected official. Have a camera ready to capture the best moments.

- ✓ *Meet with program participants and staff. (30 minutes)*

At the end of the tour, you should allow the candidate/elected official to have open interaction with employees, program participants, and stakeholders. This will allow them to offer remarks and answer questions and give them the opportunity to speak with those working directly with the individuals that come through the door.

Site Visit Do's and Don'ts

Do:

- ✓ Plan well in advance.
- ✓ Be flexible with your dates and times.
- ✓ Involve your employees, program participants, and local leaders.
- ✓ Take the candidate/legislator wherever they request (even if it is off the tour route).
- ✓ Let the candidate/legislator dictate the timing.

Don't:

- ✗ Be discouraged.
- ✗ Assume the candidate/legislator is aware of the work you do or relevant issues in their district.
- ✗ Let the candidate/elected official leave without take away materials.
- ✗ Let the site visit be the last point of contact with the candidate/legislator.

- ✓ *Closing remarks and thank you (2-3 minutes)*

Close out the visit by thanking the candidate/elected official for visiting the facility. Make sure also to supply them with your take away materials.

- ✓ *Issue the press release and/or photo release.*

Circulate the release(s) to the media and/or send to local press contacts.

After the Visit:

- ✓ *Send a thank you letter to the candidate/legislator.*

A thank you note should be sent shortly after the candidate's/elected official's visit, either via mail or email.

- ✓ *Monitor for media coverage of the visit.*

If/when positive articles about the tour are published, make sure to pass them along to the candidate/elected official.