

Building Long-Term Relationships

Site Visits

What is a Site Visit?

A “site visit” is an in-person visit by a policymaker or staff to a facility, office or location in the district or state. These visits are invaluable to helping officials understand the impact of proposed policies on individuals and businesses in their district.

When’s the Best Time to Schedule a Visit?

Most policymakers spend a considerable amount of time “at home” during what’s known as “district work periods” or “recess.” Calendars for the U.S. Congress are available through the House and Senate websites at www.house.gov and www.senate.gov. You can usually find a legislative calendar for the state legislature on the state legislative website.

How do I Set up a Site Visit?

Following is a step-by-step process for setting up a winning site visit.

- Figure out what you want to show: Be sure to consider how what you're showing a policymaker connects to the issue you want them to think about. For example, if you are trying to make the case for why you need more funding for a program, it's a good idea to show them the need, as well as how you have usefully (and frugally) spent money in the past.
- Decide who to invite: There are a number of factors involved in this decision. Is this a visit for staff or officials or a combination? We strongly recommend that you do not ignore the staff. Likewise, be cognizant of the political situation in your community. You want to be sure to invite the right local officials and not step on any toes.
- Draft the invitation: Your letter of invitation should be directed to the official's scheduler or executive assistant, usually in the district office. Call about one week

after sending the first request to ensure it has been received and to answer any questions.

- Dealing with logistics: For any site visit you will need to worry about pretty much everything, including:
 - Transportation: How will the officials get to and from the event?
 - Time: How much time can the official commit to the event? Do not try to cram too much into a short visit. Make sure you hit the highlights.
 - Food: If this visit is going to occur during a regular mealtime, you should consider setting up a discussion over an informal buffet or box lunch.
 - Weather: Obviously, you can't control the weather, but you can be prepared for all possibilities. Make sure you have enough umbrellas, bug spray, or whatever you'll need to make the visit pleasant for everyone.
- Making the case: Think carefully about who you want from your program to help you make the case, while keeping the total number of people actively participating to no more than five. Following are some types to consider:
 - Practitioners: Officials enjoy speaking with the people who perform the day-to-day tasks of the program or project.
 - Beneficiaries: "Real people" who already benefit from your work (or will in the future) and can speak with conviction and enthusiasm about your services will always impress visitors.
 - Funders/Supporters: Having those who have invested in your good works or who are leaders in the community present at the visit demonstrates support you enjoy.
- Recording the event and when to bring in the media: You want to be sure to capture this auspicious occasion. Some aspects to consider include:
 - Photographer: Consider hiring a photographer or have someone on your staff designated to take pictures for use in a newsletter or on a website.
 - Note taker: Although you don't want someone writing down every word out of the official's mouth, do assign someone the task of preparing a written report after the visit.
 - Consider inviting the media - but only after warning the official!