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A Guide to a Successful Site Visit

Hosting a site visit to one of your programs is one of the most effective ways to begin a conversation with your legislator or continue to build an existing relationship. Site visits:

- help your elected representatives more clearly understand the work of your organization, including the services you provide and the population(s) you serve.
- provide the opportunity to establish a working relationship with your legislators.
- highlight your organization's successes and educate legislators about the challenges your organization faces in meeting your mission.
- allow you to demonstrate the contributions your organization makes to your community by showcasing the services you provide, the individuals you serve and the people you employ.

It is important to host visits with local legislators and municipal officials as a regular course of business. When your legislator is called upon to show leadership on mental health and/or addiction issues, he/she will draw upon their knowledge and impressions gleaned during their visit with you!

- Invite your Legislator to visit a specific site, or group of sites in a well-defined geography. Each legislative office may handle scheduling differently, but we recommend starting with a letter or email invitation and following up by phone with the legislators State House office. Legislators may stay longer if they wish, but keep the official invitation to 60 minutes.
- Start the site visit in a place where you can comfortably accommodate visitors: a conference room, office or lunchroom where people can meet first and then wrap up after the tour is completed. Consider including staff, board members, clients and/or families in the visit to engage with the legislator as he/she takes the tour.
- Plan in advance what programs or services to highlight, with whom the legislator will meet and other details.
 - Have simple materials available, including a one-page fact sheet on your organization.
 - Hand your business card to each of the people with whom you are meeting (staff included!)
 - Take the time before the visit to formulate a strategy with any of your staff and volunteers attending the meeting. Be prepared to discuss funding sources, specific organizational challenges and possible solutions.
 - If issues are raised that you did not expect, answer directly if you know the topic. If you don't know, it's OK to tell them so and offer to get back to them with the information.
 - Make sure you include one or two brief "success stories." You might want to arrange for a client or family member to present these stories if appropriate.

- Give the legislator time to interact with those clients, staff and volunteers joining the tour. Identify employees ahead of time who will participate in the event (i.e., lead the tour, provide materials, take photos, etc.) and allow time for the legislator to address the group.
- Send a thank you letter to the public officials within a few days of the event. If you have copies of photos that were taken during the event, include those. Also, remember to send a separate thank you letter to any of the officials' staffers who may have helped coordinate the event.

Remember:

You're the expert! Legislators and staff may only know the basics about our issues. Be sure to explain all acronyms, programs, funding sources and which agencies administer the funds.