



Site Visits: Planning from A-Z (adapted from the Public Affairs Council and American Library Association)

Elected officials and their staff spend a great deal of time in the districts they represent. Site visits are, quite simply, the single best way to help elected officials and their staff understand the connections between DC policy issues and what's happening in their district. Site visits to your hospital and/or medical clinic provide mutual benefit and generate real learning.

Site visits don't have to be an arduous undertaking, especially with the ACCP Practice and Advocacy Team standing ready to help! In fact, there are just five steps to putting together a successful event:

Step One: E-mail the ACCP Practice and Advocacy Team at sseiden@chestnet.org to let us know that you are willing to conduct a hospital and/or clinic visit. We are eager to help in any way--from brainstorming ideas to drafting materials to helping you work with congressional offices.

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 facility'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 that 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 ACCP Practice and Advocacy Team know how the visit went and whether the elected official and/or staff person raised any questions that need a response. We also can assist with additional follow-up ideas to help build a lasting relationship with the office.

Following is a step-by-step guide to help set up a successful, noncampaign site visit. Your participation in this effort could make all the difference in both our short-term goal to make the issues facing chest medicine real to legislators and our long-term goals to establish and cultivate relationships with legislators and increase support for chest medicine in Congress. Please consider putting together a brief visit--and let us help!

Before the Invitation

- E-mail Stacy Seiden at sseiden@chestnet.org to notify the ACCP Practice and Advocacy Team that you are willing to conduct a hospital and/or clinic visit. We

are eager to help in any way—from brainstorming ideas, to drafting materials, to helping you work with your congressional offices.

- Contact your Government Affairs/Public Affairs Office, so that a public affairs representative may attend your tour. In fact, this representative may play a key role in helping you to organize the event.
- Determine your agenda. Your goal should be to address specific legislation (eg, legislation to address the critical care workforce shortage and/or US Food and Drug Administration regulation of tobacco products) and develop the relationship. Tailor your agenda to the legislator's interests, as this will help you increase your invitation's likelihood of acceptance.
- Have a defined tour schedule that allows sufficient time to tour the facility and enjoy informal discussion.
- Map out the tour. Choose the particular areas that illustrate the points you want to make. Select guides from among the more articulate and politically active employees.
- Determine in advance, and in coordination with, the elected official's office--if local press coverage is desired, and, if so, who should make the appropriate arrangements.
- Make sure key equipment is operational. Action is essential for an interesting tour.

The Invitation

- E-mail the ACCP Practice and Advocacy Team or check capwiz.com/chestnet/dbq/officials/ to identify your specific elected officials.
- Use capwiz.com/chestnet/dbq/officials/ to find the contact information for your elected officials.
- Reach out to the legislator's office to determine how they prefer to receive official invitations. Those received in a preferred method (*ie*, mail, e-mail, fax, phone, district office) will get attention first.
- Don't be discouraged if it takes several follow-up phone calls/e-mails before the legislator accepts. Legislators have many demands on their time. Your persistence will pay off.
- Begin scheduling about 2 months in advance. Members of the 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 at www.house.gov/house/House_Calendar.shtml and for the Senate at www.senate.gov/pagelayout/legislative/two_column_table/2008_Schedule.htm.
- An important timeframe for scheduling meetings is before, after, or during the Annual ACCP Capitol Hill Caucus, scheduled for March 9-10, 2009. If you are

unable to join us in DC for visits with elected officials, please try to schedule something in the district with a relevant staff person. The combination of DC and in-district activities will amplify our voice tenfold!

- Provide multiple dates and times for the legislator's convenience. Flexibility on your part increases your chances of acceptance.
- Make your invitation intriguing. Experiential visits for a legislator have the strongest impact.
- One of the most important people in this process is the liaison in the legislator's office. Communicating with him or her is crucial to setting up the meeting, getting details ironed out, and moving forward with a strong contact point.

Spreading the Word

- Let employees know the exact date and time of the visit in advance.
- If possible, share the highlights of the visitor's biography.
- Market the program with posters, e-mail, intranet announcements, voicemails, etc. It's a big deal and should be talked about as such.
- Recruit key contacts and prominent organization leaders to play a role in the visit and create buzz.
- Schedule a meeting/phone call with internal personnel who will be involved with the visit to ensure the plan, advocacy messages, and contingency plans are clear. This may require several meetings to sufficiently iron out the details.

Conducting the Tour

- Prepare a one-page document telling your facility's story and include basic facts, such as the number of patients served, partnerships in the community, etc.
- Review the talking points provided by the ACCP to prepare you to discuss important chest medicine issues with your legislator. This information is available at www.chestnet.org/practice/advocacy/issues.php.
- The senior executive on site should be on hand to greet the official first.
- Start with a brief introductory session in an office to overview the day. Include who and what the official will see.
- Keep close track of time. Don't rush the tour, but keep things moving. Find out how much time your guest has.
- Introduce employees by name. Remember, all employees are constituents.

- Assign an internal staff person the task of taking pictures during the visit, as well as to take notes about what the elected official or staff person expressed the most interest in.
- Consider following the tour with a short private discussion in your office. It might be advantageous to arrange for the legislator to meet with selected employees. In either case, discuss with the legislator those issues of greatest importance to the facility and chest medicine.

After the Tour

- Let the ACCP Practice and Advocacy Team know how the visit went and whether the elected official and/or staff person raised any questions that need a response. We also can assist with additional follow-up ideas to help build a lasting relationship with the office.
- Send a follow up thank you, including any relevant photos, to the legislator and a courtesy copy to any staff who attended. In that letter, reemphasize key points made during the visit.
- Follow-up on any questions raised with additional information.
- Offer to remain available to the official and his/her staff as a chest medicine resource.
- Follow up on any potential media inquiries (after working with the elected official's office).
- Provide the official and his/her press aide with any press clippings that covered the event (including your own newsletters).
- Consider asking the elected official to submit a statement for the *Congressional Record* about the visit.
- Maintain this relationship by regularly keeping up with the legislator and designated staff on legislative issues of relevance to chest medicine.
- Follow up with the employees/members in attendance. Thank them for representing the organization and educating the legislator. Encourage colleagues to sign up/remain active as ACCP Grassroots Advocates.
- Consider a debriefing with those staff members involved with the tour to discuss, for example, did you accomplish your objectives and what are the next steps.