



# FP<sup>2</sup> Toolkit: Hosting Elected Officials

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# Preparing for a Site Visit

The best time to introduce policy makers to your business and your stance on important issues is long before you need their support. This toolkit will prepare you to host elected officials and help guide your objectives to create the most productive site visit possible.

## Why Site Visits?

The pavement preservation industry provides non-exportable jobs. The industry helps boost the state economy and enhance the state's infrastructure in a cost effective, green and resilient manner. Most elected officials have little or no first-hand experience with the construction, preservation and maintenance of roads. Therefore, having elected officials, community leaders, and their staff visit your facility will help them understand how their actions are crucial for the success of your business and the community as a whole. Site visits make this possible.



## Preparation

Preparation for a site visit is key to its success. There are several key elements you need to address when preparing for a site visit:

- 1) Purpose
- 2) Attendees
- 3) Message
- 4) Presentation

## Why Invite Elected Officials?

There are three main reasons to host a site visit:

- 1) To inform legislators about pavement preservation and how your business operates and its community benefits.
- 2) To educate on issues impacting your business and the value of the pavement preservation industry.
- 3) To illustrate firsthand the importance of having a long-term highway reauthorization bill.

Each has distinct outcomes that you need to prepare for and be ready to communicate. Elected officials and policy makers need to take away a clear understanding of what they can do to help and what policies can benefit your business. Understanding and clear communication are essential and are gained through thorough preparation.

## Attendees

The people asked to attend the site visit should directly correlate to the message and goals you are trying to convey. With this in mind, there are several categories to consider depending on the issue:

- *Federal Issues* - Local members of the U.S. House and Senate.
- *Specific Policy Issues* - Members of the legislative committee that oversee that issue.

After determining who will be invited, it is important to consider whom, within your company, is best to participate in the visit.

Once you've identified your legislator, contact Tracy Taylor at 202-517-1305 or [tracy.taylor@align-strategies.com](mailto:tracy.taylor@align-strategies.com) for more guidance.

**Quick Tip:** *It's important to make sure legislative or regulatory staff is in attendance as well and to engage them in the issues you are trying to address. Often, they are the key to making sure the message is received by policymakers and stays on their radar.*

## Inviting Elected Officials

The request to schedule a site visit itself is easy to do. First, contact Tracy and she will make the following arrangements:

- 1) Engage the scheduler early, you most likely will have to adapt to the elected official's schedule.
- 2) Congressman and Senators often have a DC scheduler and a district scheduler. Determine who is best to contact by calling their office and explaining what you are trying to do. When calling ask for the scheduler's e-mail.
- 3) Do not directly contact the elected official until you've verified the schedule with the scheduler.
- 4) Duplication and follow up are essential.
- 5) Call the scheduler and e-mail a written request. Make it easy for their staff by providing information about your company and why they should come (see attached template for letter of invitation). Once you send an invitation, you may have to follow up several times.
- 6) Once an elected official or his/her staff confirm their attendance they will prepare for the visit and to do this, they or their staff have to learn about your business. Half your job is done, before they even show up!

## Message

- 1) The purpose of the site visit will help determine the message you need to convey. Additionally, it will help define the information you need to compile in order to convey the message.

## Your Role in the Community

Some examples can be:

- How many jobs your business provides, what type of people are employed.
- Investments you are making in your business – new plants, facilities, acquisitions.
- How much you pay in sales, employment, property, and other taxes.
- Benefits you offer in the community (philanthropy, fundraising, etc.)
- Additional offerings you provide the community

## Issues Impacting Your Business

Examine your business model and think about how the issue you're addressing will impact your business. Think broadly and consider all aspects:

- What this means for revenue, and therefore tax income?
- What will this mean for payroll, and therefore employment?
- What will this mean for business growth, and therefore ability to expand?

## Presentation

Your business is the site where you can showcase how important your operations are to the well-being of the community. Demonstrations are extremely interesting to those who have never seen them and should be incorporated into the visit if possible.

To enhance your presentation, prepare engaging material to hand out to participants. This will create a lasting impression and ensure your message resonates with policymakers long after their visit ends. These materials may provide more detailed information about your goals or can provide a visual aid of numbers, charts, and statistics that back up your claims and help promote your goals. FP<sup>2</sup> offers resources that may be helpful to you.

## Plan the Visit

With adequate preparation the visit should go smoothly and leave you feeling confident that your needs have been heard and are being seriously considered.

Remember:

- Always stay positive.
- Be flexible with timing-elected officials' schedules can and do change.
- Encourage participation and questions- dialogue and interaction engage your visitors with the experience.
- Make sure the staff is prepped so they can give the elected official potential questions and insights into the business and process.
- Consider if it is appropriate to allow the elected official to address a group of employees.

### Quick Tip: Contingencies

*It is important to have a contingency plan ready. While you can't plan for everything, planning scenarios such as scheduling issues, inclement weather, or emergencies—and creating a plan will make your event run smoother. FP<sup>2</sup> offers crisis support.*

## Follow Up

Following up with elected officials after their visit to your facility is crucial in reinforcing your message and establishing a good relationship.

- Thank the elected official for coming by and offer to follow-up.
- Offer any follow up information to the elected official and staff.
- Include any follow-up information that was requested at the event.
- Encourage a follow-up discussion with the elected official and staff.
- If appropriate, identify times for any necessary additional meetings.
- Include any photographs taken at the event that would reinforce the visit to the elected official.
- Inform FP<sup>2</sup> of the visit, they can follow-up with the appropriate DC staff to leverage the impact of the visit.

Create an experience that establishes a connection to your business, your advocacy, and your issues.

Continue to cultivate the relationship:

- Schedule meetings at the capital during Legislative sessions, either as a part of an organized event or on your own.
- Attend town hall meetings and other in-district events.
- Consider organizing a fundraiser for the elected official, or volunteering on his or her campaign.
- Give the official a heads up on meaningful developments such as major investments, acquisitions, projects or lay-offs. Invite them to ribbon cuttings and similar events.
- Stay in contact through email or phone calls to give a business perspective on current policy issues.

*Remember to*

*Share your event with FP<sup>2</sup> so FP<sup>2</sup> can follow up if appropriate.*

**Reach out to FP<sup>2</sup> Government Affairs at any time for help or assistance in planning your facility by emailing Tracy Taylor at [tracy.taylor@align-strategies.com](mailto:tracy.taylor@align-strategies.com)**

## Sample Site Visit Agenda

Activity	Lead By
Arrival & Registration	Staff
Welcome Address <i>Brief opening remarks about the day, purpose, and issues.</i>	CEO/President
Optional Address by Invited Officials <i>Opening comments by elected official(s).</i>	Elected Official
Facility Tour <i>'Behind-the-scenes' tour of the facility and/or project offering CEO opportunities to interact personally with elected officials while the Operations Manager details the efforts and projects of the facility- including relevant potential threats to the facility if the issue progresses. This also offers an opportunity for official to meet workers and staff.</i>	Operations Manager/ Designated Staff Member
Discussion <i>Reconvening on the purpose of the event, discussion items based on the event, and a call to action for attendees to support future success. Distribution of take-home materials regarding the purpose.</i>	CEO/President
Closing Remarks <i>Final remarks on the event, and discussion of the next steps to ensure further success.</i>	CEO/President
Adjourn <i>Make sure to engage and thank the attendees, ensure that they have all the information they need. Invite a follow up discussion and introductions for best answers on given questions, encourage further interaction if possible.</i>	All Staff

## Proper Salutations

When addressing elected officials either in person or in writing, it is important to remember which titles are appropriate and expected. Using the appropriate title will continue to foster a relationship of mutual respect and help you reach your intended goal.

Title	Letter/Envelope	Salutation/ Complimentary Close
Senator	Honorable (Full Name)	Dear Senator (Last Name)
U.S. Representative	Honorable (Full Name)	Dear Representative (Last Name)
Committee Chairman	Honorable (Full Name)	Dear Mr./Madam Chairman



# Site Visit Checklist

## Before the Visit

- \_\_\_\_ Identify invitees
- \_\_\_\_ Write invitations
- \_\_\_\_ Prepare agenda
- \_\_\_\_ Send invitations with agenda
- \_\_\_\_ Compile research on the issue, including background information
- \_\_\_\_ Prepare and test remarks
- \_\_\_\_ Prepare take-away material for attendees
- \_\_\_\_ Secure event materials (i.e.: food, seating, AV equipment)
- \_\_\_\_ Alert press if appropriate (ask Officials office if they prefer press or no press)
- \_\_\_\_ Develop appropriate contingency plans and advise staff
- \_\_\_\_ Confirm speakers
- \_\_\_\_ Brief and prepare elected officials' staff
- \_\_\_\_ Facility walk-through and contingency plan check
- \_\_\_\_ Final briefing for staff- attire, conduct, expectations, and questions
- \_\_\_\_ Prepare sign-in sheet, or other contact capture method for attendees.

## During the Visit

- \_\_\_\_ Make sure to obtain everyone's contact information
- \_\_\_\_ Interact with attendees and encourage participation
- \_\_\_\_ Make plans to take photos
- \_\_\_\_ Invite opportunities to interact with the operations of the facility
- \_\_\_\_ Invite questions and comments
- \_\_\_\_ Encourage follow-up
- \_\_\_\_ Emphasis on the 'asking' portion of the event
- \_\_\_\_ Thank all attendees for their time, attendance, and participation

## After the Visit

- \_\_\_\_ Send thank-you notes
- \_\_\_\_ Send follow-up information as requested
- \_\_\_\_ Tell FP<sup>2</sup> about the meeting