



REBUILD WITH US.

Plan an Effective Site Visit

Members of Congress will be spending a great deal of time in their districts this year due to the upcoming midterm elections. City site visits are the single best way to help federal legislators and their staff understand the connections between D.C policy issues and what's happening in their district. Site visits don't have to be an arduous undertaking, especially with NLC's Federal Advocacy team ready to help. In fact, there are just five steps to putting together a successful event.

1

Pre-Plan

Email advocacy@nlc.org to let the Federal Advocacy team know that you are willing to conduct a city visit. NLC staff members are eager to help in any way - from brainstorming ideas, to drafting materials, to helping you work with congressional offices.

2

Develop a Plan

What infrastructure project would you like to show the Members of Congress and/or staff person? Do you have a specific infrastructure project where you need additional federal support or an innovative project to highlight? Who should attend the visit?

3

Issue the Invitation

Provide the details of your proposed visit in a short letter of invitation, which you can fax or e-mail to the district office. Follow up with a phone call and get the planning process underway.

4

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 problems.

5

Follow Up

Let the Federal Advocacy team know how the visit went and whether the Members of Congress and/or staff person raised any questions that need a response. We can also assist with additional follow-up ideas to help you build a lasting relationship with the Member of Congress' office.

Site Visit Setup Checklist & Tips



Step 1: Pre-plan.

- Check with NLC's staff to let them know of your willingness to conduct a visit - and get their support!



Step 2: Plan the visit.

- Decide who to invite to the site visit. Include elected officials and relevant staff, as well as members of your community.
- Decide what to show your guests. Choose locations that relate to policy issues and highlight infrastructure projects underway or completed infrastructures projects that leveraged federal funds.
- Consider inviting the media - but only in coordination with the congressional office.
- Put the plan in writing. See sample agendas in this guide.
- Schedule a meeting/phone call with your internal personnel involved with the visit.



Step 3: Issue the invitation.

- Use the template in this guide to write an invitation letter for your Member of Congress or a staff person.
- Find the website and district office phone numbers for your legislators using House.gov or Senate.gov. If your legislator has multiple offices, choose the one closest to where you plan to hold the visit.
- Call the office to ensure that your invitation is directed correctly. Ask for the district scheduler and tell him or her that you like to send an invitation and ask the best way to send it.
- Follow up on all invitations sent with additional phone calls/e-mails until the visit is scheduled.



Step 4: Conduct the visit.

- Coordinate with internal staff the day before the visit.
- Prepare a one-page document telling your city's infrastructure story. Be sure to include basic facts about your city relevant to what you want to discuss.
- Review the talking points provided by NLC to prepare to discuss important city issues with your Member of Congress.
- Review the plan to ensure that all time-frames are reasonable and to develop contingency plans in case of bad weather, transportation breakdowns, or other snafus.
- Make plans to record the visit. Have a photographer or internal staff take pictures, and assign someone to take notes, include key quotes or topics in which the Member of Congress expressed the most interest.



Step 5: Follow up.

- Send a thank-you letter to the Member of Congress' office.
- Send pictures from the visit to the Member of Congress' office. And better yet, share the photos on social media sites.
- Follow up on any questions raised by providing additional information.
- Follow up on any potential media inquiries (after working with the Member of Congress' office.)
- Consider asking the Member of Congress to submit a statement about the visit for the Congressional Record.
- Report back to NLC about how the visit went. Email advocacy@nlc.org with information about your site visit
- Maintain regular contact with the Member of Congress and his or her staff.

Who Should Attend the Site Visit?

A number of factors are involved in deciding whom to invite to the site visit. For example, is this visit for staff or officials, or a combination? We strongly recommend that you include the staff and be cognizant of the political situation in your community. You want to be sure to invite the key local officials to be included and help make the strongest case for federal infrastructure investment in your city.

For that reason, do research on officials and their staff. Representatives and senators can structure their offices however they see fit - there are no formal rules about staff roles or titles. For your reference, traditional roles and titles of key staff members whom you are likely to find in most district/state offices are listed below. We recommend you ask the district office, who from their staff should be included.

District/State Staff Caseworkers

If you need help on a problem concerning federal agencies, ask for the caseworker who handles that issues. For example, if you needed help getting a Social Security check, you would ask for the Social Security Caseworker.

District/State Scheduler

If you want to meet with the representative or senator in the district or state, or if you want to invite him or her to an event, ask for the district or state scheduler. This person schedules the Member of Congress' time when he or she is in the district or state.

Field Representative

If you want to meet with a district or staff person to discuss a particular local issue, or if you want to invite someone from the district staff to a local event or meeting, ask for the field representative who handles your issue.

District/State Office Director

This staff member oversees the operations of the district or state staff. He or she is often the point person in the district office for highly sensitive local political issues.

Sample Visit Agendas

FACILITY TOUR PLAN

(1.5 HOUR VISIT)

10:00am - 10:15am	Greet Member of Congress/staff at front office.
10:15am - 10:45am	Tour one specific city-funded infrastructure project that represents the local-federal partnership.
10:45am - 11:15am	Meet in conference room with employees for informal remarks and Q&A.
11:15am - 11:30am	Wrap up and get final questions and comments from Member of Congress.

SMALL BUSINESS/COALITION GROUP MEETING

(1.5 HOUR VISIT)

10:00am - 10:15am	Greet Member of Congress/staff at front office.
10:15am - 10:45am	Tour one specific city-funded infrastructure or project that represents the local-federal partnership.
10:45am - 11:15am	Meet in conference room with employees for informal remarks and Q&A
11:15am - 11:30am	Wrap up and get final questions and comments from Member of Congress.

PARTNER TOUR PLAN

(1.5 HOUR VISIT)

10:00am - 10:30am	Greet Member of Congress/staff at front office. Provide briefing.
10:15am - 11:15am	Load trucks/carts and drive to visit flagship infrastructure projects. Coordinate with partners on the city message.
11:15am - 11:30am	Reconvene at office for refreshments and Q&A with employees.

Invitation Letter Template

[Date]

[The Honorable Name]

ATTN: Scheduler

[Street Address]

[City, State and ZIP Code]

Dear [Senator/Congresswoman/Congressman Name]:

As a representative of city interests in your district, we invite you to visit [City, State]. Specifically, we hope that you might be available [the week of _____ or a specific date] for a brief [description of visit, e.g., tour/meeting with employees]. By way of background, our city serves [information on number of citizens] in the community. [(if applicable) Our mission is to _____.]

We are eager to show our work in [issue/service, e.g., community development, transportation planning, water preservation, bridging the digital divide] for our area. In particular, we would like to [fill in details of visit here, e.g., “show such-and such project in our city” or “have you join us for an all-employee meeting at _____”].

As you know, the federal government is an important partner in our efforts to address the existing core infrastructure backlog, reestablish long-term funding and use new technologies that will serve America’s cities for the next 100 years. [Describe any specific infrastructure needs you’ve been able to fulfill with the assistance of federal funds.]

Upcoming debates in Congress on the need to invest in our nation’s infrastructure will have a dramatic impact on our city. We would welcome the opportunity to discuss these potential impacts further - and provide needed background and resources for your office on this important issue.

Thank you in advance for your consideration. To set up a visit, or if you have any questions, please contact [name, email, and/or phone number].

Sincerely,

[Name]

[City title]