



# IAAPA 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 attractions industry provides 1.3 million non-exportable jobs and is a \$219 billion dollar industry. The industry helps boost the state economy and tourism while adding to community development. 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.

### Quick Tip: Ethics Compliance

*Different jurisdictions have different ethics laws. Ask IAAPA for help planning your event before inviting the elected official.*

## 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 elected officials about how your business operates and its community benefits.
- 2) To educate policymakers on issues impacting your business or the attractions industry.
- 3) To promote a new initiative, attraction, or addition to your business.

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:

- *Local Issues* - Elected officials from your area, such as city council, school board, county supervisors, regulators, and community leaders.
- *State Issues* - Your state house and senate members.
- *Federal Issues* - Local members of the U.S. House and Senate.
- *Specific Policy Issues* - Members of the legislative committee that oversee that issue.

Once you've identified who best to contact for your specific goal you can find out who your representatives are by visiting the site:

<https://www.usa.gov/elected-officials>

The site will direct you to find your state's elected officials, as well as provide the contact information for their district offices.

**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.*

## Inviting Elected Officials

The request to schedule a site visit itself is fairly easy to do:

- 1) Engage the scheduler early, you most likely will have to adapt to the elected official's schedule.
- 2) Do not directly contact the elected official until you've verified the schedule with the scheduler.
- 3) Duplication and follow up are essential.
- 4) Call the elected official, send a hard copy, and confirm the appointment multiple times.

## Message

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.
- How much you pay in sales, employment, property, and other taxes.
- Benefits you offer in the community (philanthropy, fundraising, etc.)
- Additional offering 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 well-rounded and consider all aspects:

- What this means for sales, and therefore tax income?
- What will this mean for payroll, and therefore employment?
- What will this mean for your ability to hold fundraisers and therefore support charity?
- What will this mean for business growth, and therefore ability to expand?

## Promote New Initiatives, Attractions, or Programs

New initiatives require an understanding of the community and its needs. New is different, which brings challenges and opposition if not handled with care. The key is engaging opinion leaders early. Have them understand the purpose early on and garner support before opposition mounts. Here the important aspect isn't numbers, but vision:

- Include information about what your new program can do.
- Include how the new program applies to your overall mission.
- Identify ways in which the new program can assist the community.
- Identify the economics of the new program and how it impacts the overall business.

## Presentation

Your business is the site where you can showcase how important your operations are to the well-being of the community. "Behind the scenes" tours 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. IAAPA offers resources that may be helpful to you in our Benchmark reports.

## 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 the group.

### 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. IAAPA offers crisis support. Contact [pressoffice@IAAPA.org](mailto:pressoffice@IAAPA.org) or call 703.836.4800.*

## 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.

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.
- Stay in contact through email or phone calls to give a business perspective on current policy issues.



Remember to share your event with IAAPA so that IAAPA can follow up if appropriate!

## Sample Site Visit Agenda

<b>Activity</b>	<b>Lead By</b>
<p>Arrival &amp; Registration <i>Food and interaction with other attendees</i></p>	Staff
<p>Welcome Address <i>Brief opening remarks about the day, purpose, and issues.</i></p>	CEO/President
<p>Optional Address by Invited Officials <i>Opening comments by elected official(s).</i></p>	Elected Official
<p>Facility Tour <i>'Behind-the-scenes' tour of the facility offering CEO opportunities to interact personally with elected officials while the Operations Manager details the efforts and programs of the facility- including relevant potential threats to the facility if the issue progresses.</i></p>	Operations Manager/ Designated Staff Member
<p>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></p>	CEO/President
<p>Closing Remarks <i>Final remarks on the event, and discussion of the next steps to ensure further success.</i></p>	CEO/President
<p>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></p>	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
Governor of State	Honorable (Full Name)	Dear Governor (Last Name)
Attorney General	Honorable (Full Name)	Dear General (Last Name)
State Senator	Honorable (Full Name)	Dear Senator (Last Name)
State Representative, Assemblymen, or Delegate	Honorable (Full Name)	Dear Representative Delegate <b>OR</b> Assemblyman/woman (Last Name)
Mayor	Honorable (Full Name)	Dear Mayor (Last Name)

# 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
- \_\_\_ 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
- \_\_\_ 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 IAAPA about the meeting