

Engaging & Inviting Elected Officials to a Site Visit – Strategies That Work!

Elected officials may serve at the national, state, or local level. Their districts range from neighboring townships to entire states. Every day, these officials may receive letters, post cards, phone calls, emails and social media messages advocating positions on a wide variety of complex issues. Though each office has many interests competing for attention, a few strategic steps can help you and your organization rise above the barrage of requests and become a trusted contact and invaluable resource for your elected officials.

Elected officials at all levels of government depend on advice from constituents to successfully craft and pass legislation. With the variety of issues currently facing the state's aging and disability networks, it is more important than ever to educate policymakers on the real-life impact of current and proposed legislation. Elected officials are more likely to listen to constituents whom they know and trust. This makes it important to build solid relationships with your elected officials before an urgent matter develops or you have a specific need or request.

One very effective way to build strong relationships with your elected officials is by inviting them for site visits. By inviting your elected officials to visit your agency, you get the opportunity to show them firsthand the impact your programs are having in their district, the community and on the people you serve. These visits can help you establish a vital relationship with the lawmaker and/or his or her staff. As you begin to develop these relationships consider not only what you and your agency need from your elected officials, but also the challenges faced by your elected officials. Be willing to help your officials meet those challenges and understand your goal is to build *lasting* relationships that go beyond a single need or issue.

Elected officials may or may not be familiar with some of the aging unit/Aging and Disability Resource Center (ADRC) programs and services. This makes it even more important for them to hear firsthand from board members, staff, and program participants about the positive impact your services are having on the health and well-being of older adults (and, if applicable, people with disabilities) in your community. It is equally important for them to learn about the things you are unable to do due to a lack of funding and resources. You are the “boots on the ground.” You are the legislators’ eyes and ears in their districts. Make yourself valuable to your elected officials by creating opportunities for them to learn firsthand how programs work and how the policies they craft affect the lives of the people in their districts.

Arranging and Conducting a Site Visit

- **Making the request:** Before contacting your elected official consider *who* should make the request. Do you already have a solid relationship with the official? If yes, then you may wish to make the request. If not, inquire with your board and advisory committee members or staff member to see if someone else has a strong relationship with the official? Your federal elected officials have offices in Washington, D.C., but also have local offices. Consider reaching out to the local office nearest to your agency to make the request (see contact information at the end of the document) by phone or email (often preferred) and ask to schedule a site visit with the official. State and federal officials generally have “schedulers,” so it is helpful to contact his/her

scheduler to make the request. Note, federal officials often have separate schedulers for in-state visits and visits in Washington, D.C.

Do not be discouraged if it takes several invitations before your elected officials accept. Schedules are tight, so be ready to act on short notice or weeks/months down the road. Be prepared for schedule changes and a staff-only visit. Lawmakers' schedules can change at the last minute, for instance, if they are needed for a vote or committee meeting back in Madison or Washington, D.C. Meetings with staff are still valuable for information sharing and relationship building with the office. When requesting a site visit, be mindful of when your elected officials are in session. Take advantage of Congressional recesses when your federal legislators are more likely to be back in Wisconsin. State legislators, even when in session, are more often in-district on Mondays and Fridays.

If you really want to ensure your elected officials can attend, do not schedule the event first. Invite the official indicating that you will plan the event around his/her availability.

- **Be Creative in Developing Events:** Is your organization announcing a new program? Do you have an upcoming volunteer recognition event or health fair? Are you hosting a special day for caregivers during National Caregiver Month? Do you have a special meal celebration (Mother's or Father's Day, Valentines Day, Veterans Day) scheduled at your dining sites(s) or a home-delivered meal route an elected official could ride-a-long on? Did you recently receive a new bus or vehicle an elected official could ride on with your participants? If you don't have any already scheduled events coming up, consider hosting a Town Hall meeting on a particular topic and invite your elected officials to speak and attend. Could you put a legislative update on your board agenda's monthly or quarterly and invite elected officials to attend. This would provide an opportunity for elected officials to share what they are working on and hear your agency's successes and challenges. Consider inviting the media to your event for additional exposure.
- **Prepare for Your Site Visit:** Learn about who you're trying to influence. What committees does the official sit on? What legislation did he/she introduce? Where was he/she born and where did they go to school? Research any data that will help build a connection to you or your issues.

Be prepared so that your site visit is concise but meaningful. Develop a plan for the visit, including logistics and discussion topics. At least some of the time, your site visits should create opportunities for your elected officials to see your programs in action, not just people sitting around a table talking. Have staff prepared to tell the official what an average day for them is like. Build in a tour, so officials can see how the program functions and the space in which you operate.

Inform your elected official in advance about the purpose of the visit and the issues you want to discuss, such as Older Americans Act or ADRC funding needs. The official may also want to discuss other topics; use this as a learning opportunity for your elected official and you (and your staff or board).

Your invitation to an official represents a request to trust your ability to manage the event and properly utilize their limited time. An ill-attended or disorganized event will set back your efforts.

Elected officials are primarily looking for some combination of voter contact, press coverage and issue education. Your elected officials will be more eager to attend event in the future if you can deliver these things.

Share the agenda, press materials, and invite list with your official's office. Make sure the agenda does not monopolize the official's entire day. Elected officials often have multiple requests for time when in their districts. Be respectful by having an event with an efficient schedule, which includes beginning on time and ending promptly. If your event is lengthy, or the elected official's appearance is part of a larger event, build in an opportunity for them to depart in a graceful manner such as during a break for refreshments.

If you wish to provide refreshments keep in mind that elected officials must abide by certain ethics rules. Don't be offended if the elected official passes on your offer or asks to reimburse you for the cost of his/her food and drink.

- **During Your Site Visit:** Make it clear to the elected official what their role will be during the event or site visit. Will the official be formally speaking, serving, or visiting with staff and participants during ride-a-longs?

Have someone prepared to share a personal story. A personal story can help to put a human face on an issue in a way no statistic or data point can do. A good personal story needs to speak in real-life terms about how legislation (including budgets) could (or did) affect you, your friends, your agency, and/or your community.

Try to take a picture with your lawmaker during their visit. These pictures and a short article are good to share in your newsletters and on your social media sites.

After the visit

- **Follow-up:** Follow-up with a thank you note to show your gratitude to the lawmaker and/or staff for taking time out of their busy schedules to visit your site.
- In every encounter with elected officials or their staff, educate them on the background of your organization and the latest issues. Maintain the relationship by updating your elected official and designated staff on relevant legislative issues that are vital to your programs.
- Become a trusted resource on aging and disability issues. Ask your elected officials how you can help them. Do they need examples of the impact of a particular bill provision? Are they in need of contact with a person or family who is/has been directly affected by an issue? Do they need other contacts or resources from you regarding a particular subject? Make sure they know your agency is a resource for them when they have constituents with aging/disability related.

The challenge: At least once a year (more is better), meet with your local, state, and federal officials or their staff. It is important that you establish a working relationship with each of your elected officials, so that they know you and the issues that are important to you, your agency and those you serve.

These tips are focused on in-person events with your state and federal legislators. Not all contacts with your legislator need to be in-person. It is valuable to also meet with your elected officials by attending their events in the district or connecting with them by phone, email, or mail. For contact information for your state and federal elected officials, see [State and National Advocacy Resources](#). You can also find contact information for your federal elected officials at [Wisconsin Members of the 118th Congress](#), including details related to their in-district offices.

Customizable message (email or letter) to your elected official (modified from a message shared by Meals on Wheels America)

Date

Subject: You're Invited – Join us for (a tour, board meeting, ride-a-long, event)

Dear Senator X/Representative X

I am writing to you on behalf of (insert name of your organization) and the older adults and people with disabilities we serve to invite you to visit our organization this (summer, fall, winter, or spring) at a time that works for your schedule (or the date of a specific event if it is already scheduled).

We would be honored if you could join us for a/an (upcoming board meeting, Town Hall, X event or recognition, visit with participants while riding the bus/accompanying or volunteer meal deliverer/serving meals). By joining us, you will have an opportunity to hear from your constituents and witness firsthand the positive impact our X program(s) have on the older adults and people with disabilities in your district.

I am available to answer any questions or talk with you further about opportunities; you can reach me at (insert phone number and email address).

Thank you for your consideration or our request and we hope to see you soon.

Sincerely,

Name

Contact Information