



Ohio Children's Alliance

Leading change for child and family service providers

Hosting a Site Visit: A Guide

Once you have found your [legislator](#), you can contact their office to schedule a site visit, or reach out to us and we can help facilitate! Whether you reach out via phone or email, be sure to have different dates and times readily available to schedule at least a few weeks to month out if possible.

Preparing for The Visit

- 1. Identify Goals.** Establishing the reasons for the visit is crucial. Please think about what specific programs you would like to highlight or policies you would like to change. As you consider this, keep in mind the objectives we think would be important to achieve:
 - Helping the legislator see what community-based child welfare or behavioral health services look like.
 - Educating the legislator about the specific components that constitute the important work you do.
 - Providing the legislator an opportunity to think about the question: “If I were a child or family accessing these services, or a staff person providing these services, what is working well and what improvements would I like to see happen?”
- 2. Start Planning Logistics.** Create an agenda to determine what your top priorities as well as how to maximize the time you have. Plan for the site visit to last one hour and build your activities around that timeline.
- 3. Identify Other Participants.** Based on your goals, make a list of how many other participants you would like to have. These can include clinical staff, caregivers, program staff, local leaders, or community partners.
- 4. Determine Participant Roles.** Once this is done, you should identify the roles everyone should have. For example, think about who will greet the legislator, give them a tour, and introduce them to other advocates. However, it is important to remember the size of group that will be appropriate for the setting. You want to make sure the legislator, staff, and people you serve are comfortable.
- 5. Prepare With Your Group.** Confer with staff and the other participants before the visit to go over your goals, the agenda, who has what role, and what information you want to get across.
- 6. Notify the Ohio Children's Alliance.** We would love to join the site visit if possible. However, if we cannot make it, we can help with preparations and/or follow up.

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7. **Send a Reminder Email.** A week prior to the site visit, send a confirmation email to the legislator's office. Include any parking and other logistical information they may need. Offer to answer any questions they may have and make sure to provide a phone number the member can call should something happen at the last minute.

Hosting the Visit

1. **Identify Why Your Legislator Has Visited and Make It Personal.** When your legislator arrives, begin with introductions and an overview of what you do. Be prepared to share information about the history of your organization, what populations you serve, what certifications you have, and what your organization's goals are.
2. **Be Yourself.** Don't feel like you have to change your day-to-day operations just for this visit. And if you don't know the answer to a question, don't panic. You don't have to make something up on the spot. It's perfectly fine to tell a legislator you don't know the answer to their specific question, but that you will get in touch with your government relations resources and get back to them. We are happy to help with any follow-up!
3. **Show Off Your Accomplishments** Unless a legislator has had direct experience with child welfare or behavioral health, they are likely to be unfamiliar with the intricacies of what you do. Make sure that you explain how your program is distinguished, why it is evidence-based, and why it deserves support.
4. **Utilize Opportunities to Make an Impact.** If on your tour or during your sit-down conversation you are able to provide a demonstration or bring in perspectives of those that have benefited from your organization please do so! That will help drive home the impact you make. Remember, conversation should be informative but also presented in a way using relatable and easy-to-understand terms.
5. **Take Photos.** Make sure to get plenty of pictures! If you can try to get candid pictures as well as group shots.
6. **Do Not Give Gifts.** Ohio legislators are limited in the gifts they can receive by law. Because it can be cumbersome in terms of paperwork to determine if they can accept a particular gift, many Ohio legislators will turn down gifts any way so it is best to steer clear of the practice. They have enough coffee mugs!
7. **If Appropriate, Provide a Final Ask.** If your organization wants a specific policy change or increased state funding, request specific action be taken. This can include asking the member to champion an issue, draft an amendment or bill,

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provide a favorable vote, or keep your organization in mind during budget season. If you need help preparing an ask, please reach out to us! But keep in mind that you do not need to provide an ask now! Especially if it is the member's first visit, focus on providing information and letting them get to know you and what you do. Use it to build off of and make policy/legislative asks in the future.

8. **End the Visit on a High Note.** Let the member or aide know you look forward to continuing to work with them and serving as a resource. Leave your name, address, email address, affiliation, and telephone number with the member. Thank them for taking time to meet with you before they leave!

After the Visit

1. **Follow Through with Follow-Up.** We recommend that you provide a hand-written message thanking the member or staffer again and briefly summarizing the major issues discussed. Be sure to follow through on any commitments you made and provide any additional information requested.
2. **Share What Happened.** Share pictures and details from your site visit on social media, in your newsletter, or on your website. When possible, tag your legislator in the posts and share pictures. Please also share your experience with us so we can promote your meeting and help with any follow-ups.
3. **Finally, remember** that relationships are important to accomplishing your goals! Continue to engage your legislators through periodical meetings, emails, or statehouse visits. And let us help you to maintain those relationships any way we can!

***Advocacy Note for Non-Profits:**

If you are a non-profit organization, there are some things the law says you cannot do. Here are some basics:

- You must take steps to ensure that you indicate no support or opposition to the candidate or legislator at the event.
- No political fundraising should occur at the event.
- 501(c)(3)s are allowed to try to persuade candidates or legislators to agree with them on issues and to take a public stand, but that is as far as you may go. You may not ask the candidate or legislator to sign a pledge of support for your position on those issues; such action would imply that you favor candidates or legislators who make the pledge.

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