

Utah Nonprofits Association Guide to Hosting a Tour with Policy Makers

Overview: Utah Nonprofits Association Guide to Hosting Tours with policy makers is an advocacy resource tool to help nonprofit organizations showcase their mission and invaluable contributions to the community. Hosting a tour can connect policy makers to the face, emotion and impact that nonprofit organizations have within the community. Hosting a tour increases education and awareness which can impact outcomes of local, state and federal policies.

By inviting policy makers for a tour:

- Policy makers will learn the fundamentals of your organization. This can help them understand the importance of supporting public policies that advance your goals, objectives, and mission.
- Policy makers can witness your organizations mission in action. They will connect faces and emotions of staff and clients from your organization so they experience firsthand how their policy decisions affect your community.
- Policy makers see how nonprofit organizations spur job creation and economic development opportunities in urban, suburban, and rural communities across the state.

Before tour:

Should we have a tour?

- Does it make sense for our organization?
- Do we have observable programs where people can see direct services?
- Do we have a physical space where our mission is visually supported?
- If not, would it make more sense to schedule a meeting with the policy maker to meet in their office?

Identify a goal for hosting a tour. Possible goals may include:

- Awareness
- Support
- Community Connection
- Policy Issues

Identify the policy maker that has influence in your defined goal. It could be local, regional, state or federal.

- City Council Members
- County Officials
- Licensure Board Members
- Mayor (city or county)

- State Senator or Representative
- Governor
- Federal Senator or Representative

Draft and send an invitation letter six to eight weeks in advance of preferred date of the tour. Be mindful of congressional working dates as this will influence availability.

Be sure to include:

- Proposed date and time of tour.
- Name and location of organization.
- Specific details about the site or project that may interest your policy maker.
- A clear explanation about the role of your organization in the community.
- An overview of what your policy maker will experience during the site tour (expected length should not exceed 1 to 1.5 hours).

A template invitation letter is included in the appendix of this tool kit.

Organizing the tour:

- Develop an internal working group to discuss the logistical components of the tour and prepare site and staff to host a policy maker.
- Map out the tour route to help you navigate your policy maker through the tour.
- Develop talking points of what you plan to discuss and highlight during the tour.
- Assemble an information packet for your policy maker that showcases your organizations mission and contributions to the community.
- Create name badges for all tour participants (staff, policy maker, and policy maker's staff).

During the tour:

- Have a brief meeting to introduce the policy maker to your organization and acquaint everyone participating in the tour.
- Implement the previously planned tour route and talking points highlighting your intended goal for hosting a policy maker.
- Take notes during the tour to record any requests or follow up questions made by the policy maker.
- With permission from the policy maker share pictures of the tour on social media.
- Be flexible, the policy maker may need to leave early.
- Always thank the policy maker for their time and interest in your organization.

After the tour:

- Send a thank you letter to your policy maker within a few days of the tour.
- Offer your insight and expertise as a resource for your policy maker for future needs.

- Keep in touch with your policy maker, periodically by inviting them to events to continue the connection.

A template thank you letter is included in the appendix of this tool kit.

Appendix

Template Invitation Letter

[Date]

The Honorable Claire McCaskill
United States Senate
506 Hart Senate Office Building
Washington, DC 20510

Dear Senator McCaskill:

Insert the organizations name and date/time of the proposed site tour.

On behalf of the Community Resource Organization (CRO), I would like to extend an invitation to you to tour our new facility – City Center Connections on Thursday, June 9, 2017 at 10 a.m.

Include the “hook” – specific details about the site or project that catch your elected official’s attention.

City Center Connections recently opened to the public in May 2017. This state of the art facility was constructed and developed in the heart of Salt Lake City to help connect community members to valuable health resources offered by many nonprofit organizations throughout the state of Utah. The building plans and development were a combination of careful planning and collaboration from several key stakeholders in our community who were eager to be engaged with populations in need of similar services. A site tour will give you an up close and personal look at how some of our most admired and successful programs work together to serve members of our community.

Explain the role of your organization in your community.

Community Resource Organization is dedicated to connecting community members to the resources they need to improve and achieve optimal health and overall wellness. Community Resource Organization believes that a holistic approach to wellness is key to achieving overall health in our community. With the help of a health and wellness expert, clients may self-identify one or several areas of wellness they hope to improve. The Community Resource Organization ensures each client is connected to nonprofit organizations housed in our facility or throughout the community that provide services and resources to help each individual reach their wellness goal. A strong [local, state or, federal] commitment is critical for Community Resource Organization to continue to provide services to our clients.

Explain what the elected official will experience and logistical information regarding the site tour.

This site tour is an opportunity for you to see our mission in action as we visit each department highlighting the eight contributing keys to wellness. The site tour will also include an open discussion about the nonprofit organizations we partner with and their benefits and contributions to our community. We expect the entire tour to one hour. To accept our invitation, please have a member of your staff contact me at [Phone Number] or [E-mail address].

Thank the elected official for considering your request.

Thank you for your consideration, and we look forward to providing you a unique experience of touring City Center Connections. Thank you for all that you do on the behalf of our state and the nonprofits community.

Sincerely,

[Name]

[Title]

[Name of Organization]

Template Thank you Letter

[Date]

[Name of Elected Official]

[Office Address]

[City, State, Zip]

Dear [Name of Elected Official]:

Thank the elected official for visiting your organization.

On behalf of the **[name of organization]**, I write to thank you for taking time to tour [name of site or project] on [date tour occurred]. Your visit provided us the opportunity to demonstrate the important role of accessible health and wellness resources in our community, and highlight how individual life changes can strengthen and improve our community as a whole.

Reiterate the highlights or something specific the elected official was interested in.

It was a great honor to showcase **[name of site or project]** as a community health resource. Our facility is critical to providing comprehensive overall health and wellness services and I hope the tour enhanced your understanding on how our organization impacts our community in all aspects of health.

Reconfirm your organizations connection to the community and public policy.

I hope the site tour highlighted how vital **[local, state, or federal]** investments help nonprofit organizations connect community members to vital health services. Again, it was a pleasure providing you with a site tour of **[name of site or project]**, and I welcome the opportunity to be a resource to you and your staff on issues important to our community.

Warm Regards,

[Name]

[Title]

[Name of Organization]