



# Staging a Tour of Your Facility or Program

## A "How To" Primer for a Successful Public Affairs Event

### Introduction

Inviting elected officials and policymakers to tour your facility or program and to learn more about the work you do is an effective method to forge strong relationships and educate opinion leaders. This step-by-step guide for staging a successful tour has been designed for general use and offers suggestions and considerations for customizing your tour. The guide was adapted from Jensen Public Affairs and updated by the CAFR Policy Committee in May of 2016 as a benefit for CAFR members.

### Step 1: Pick a Date

- Begin your planning at least two or three months in advance.
- Choose a date that does not conflict with the schedules of persons to be invited. For instance, if state legislators are the target audience, do not schedule your event during the time the Colorado General Assembly is in session. If city council is invited, don't schedule your event on the day of the week when they typically meet. A little research may be required.
- Choose a time of day that is convenient and offers *interesting* interactions between guests and your facility or program.
- Consider offering a meal or refreshments in conjunction with your event. For instance, early morning meetings that offer coffee and a light breakfast are popular and often fit into people's busy schedules.

### Step 2: Determine the Invitation List

- Research the people you want to invite. Who is the state senator and state representative for the district in which the facility is located? What audience are you seeking to educate? You may wish to invite an assortment of federal, state and local officials for networking purposes. Contact information and scheduling protocols can usually be found on websites.
- In addition to elected officials and policymakers, consider inviting opinion leaders from the community, prominent donors or board members for your organization and *representatives of local news media outlets*. This is a great PR opportunity for your organization. At the very least, have a press release drafted in the absence of press.
- Create a database from which you can generate mailing labels and track responses.

### Step 3: Plan the Program for Your Tour

- What do you want people to see? What is it that will be interesting to guests?
- Who is the best spokesperson for the programs or activities that participants will be shown? Would it be appropriate for a customer or client to be included? Perhaps consider testimonials in lieu of a customer or client's attendance.
- What preparations are required? Notify employees and staff about the tour and make sure the facility is presentable. Are there legal issues or privacy issues to consider?
- Are there logistical concerns? Do guests need to travel to another location, such as a separate building on a campus? Could inclement weather create complications? Is there appropriate attire the attendees need to plan on ahead of time? Communicate ahead of time to minimize challenges.
- Consider the amount of time it will take to welcome guests, introduce staff and leaders, tour the facility and regroup for questions and answers, and possible refreshments. From start to finish your tour should last 60-90 minutes. Longer tours are possible, but create scheduling challenges. Be brief, concise and stay on topic. Let the questions from attendees guide the rest of the conversation.

### Step 4: Create and Distribute Invitations

- Include all pertinent information on your invitation, including directions, parking information, and appropriate attire. Indicate the nature of the tour or the persons that will be speaking to create interest in the event. Also indicate if meals or refreshments will be provided.

- Include a rough schedule of events on the invitation so participants may plan to attend a portion of the event. A rough schedule also indicates the end time of the tour so guests can see the time commitment involved.
- Mail an invitation to all guests at least 5 or 6 weeks prior to the date and follow up just prior to the event (see Step 7 below).

#### **Step 5: Prepare Written Materials**

- Determine the documents and materials that will be given to guests.
- Including copies of newsletters, publications, advertisements or marketing materials adds variety to a packet of written materials. You may want to include a token gift such as a note pad or knick-knack from your facility/program.
- Fact sheets on issues of concern or statistics about your program or facility may be useful to the elected officials.
- Collate the documents into a packet for each guest to take with them.
- Include titles and contact information for the employees or spokespersons they met during the tour.

#### **Step 6: Rehearse Roles of All Participants**

- You may wish to have a different person welcome the guests than the person that leads the tour. Each person's role should be clearly outlined and they should be aware of time constraints for each portion of the tour.
- Assign someone the responsibility to be timekeeper to ensure the tour ends on time.
- Develop talking points or scripts for each presenter.
- Plan in advance who will respond to anticipated questions.

#### **Step 7: Make Reminder Phone Calls Prior to the Date of the Tour**

- Personal calls and voice mail messages should be made about a week prior to the event. Remind the invited guests that they indicated they would attend and you are looking forward to hosting them.
- Dropping names of confirmed attendees may create additional interest in attending. "Well, if Senator So-and-So is attending, I need to be there, too."

#### **Step 8: Follow-Up your Event with Thank You notes**

- Send a thank you card to each participant. Include the business card of a contact person should they have any questions.
- Send the packet of written materials to anyone that planned to attend but did not show up for the event. Express understanding for their busy schedule and your availability to host them on another date or answer any questions that they have.

#### **Step 9: Stay in Touch**

- Remind the participants in all future communications that you met during their tour of your facility. This adds context and credibility to all future communications you have with elected officials that toured your facility.
- Add participants to your mailing list for newsletters or publications. They cared enough to tour your facility; keep them updated on your operations and issues.