

## **STEPS FOR SUCCESS: Site Visit Checklist**

There are many challenges currently facing workforce development system: funding cuts, increased demand for services, questions regarding program effectiveness, and more customers with multiple barriers.

What is the best way to get your message ahead of the myriad of other worthy programs vying for the attention of your elected officials? Have your elected official visit your program and hear directly from your customers.

Let's face it—we rely on experts all the time. You rely on your financial planner to help you navigate the financial market and you rely on your doctor to provide you with the best treatment options for your health. You, too, are an expert. Policymakers, job seekers, employers and education providers need you to help guide their investments in workforce development.

All you need is a bit of time, some local resources, great customers and the ability to clearly state how your efforts specifically support economic recovery, business expansion, and your local community

The following are some helpful hints and ideas that you can utilize to make your site visit most effective.

### **Start Strong!**

- If you do not already have a relationship established with your Members of Congress, the first step is to place a call to his or her Washington, DC office. Request to speak with the scheduler.
  - Be aware that some legislators handle their schedule out of the local offices. If you do not already have a relationship with the legislator, you may want to have the initial invitation come from someone who does have a relationship.
- Start early and have a few dates and times in mind. Be sure to make the invitation when legislators are scheduled to be in their home districts.
- Do your homework! Link your invitation to the legislator's priorities. Look at the Member's biography, committees he/she serves on and his/her voting record on issues related to economic recovery and workforce development.
  - Places to look include Congress.org, Twitter, Facebook, Google, House.gov and Senate.gov.

### **Build Excitement!**

- Leverage the media. Reach out to local reporters and invite them to the visit. You will want to reach out to your legislator's communications staff to ensure coordination of these efforts.
  - Don't forget about utilizing the power of social media by announcing the visit via Twitter, Facebook and blogs.
- Consider asking your local elected officials to issue a press release.

- Thoughtfully create your guest list of local officials, business customers, successful job seekers, and community leaders. Match the guests to the legislator's priorities.
  - If your official is primarily concerned about local business growth, put your business customers in the spotlight. If your legislator has gone on the record about the need to serve transitioning veterans, make sure that a successful veteran is part of your group.

### **Prepare Smartly!**

- Determine the three key points that you want to make and create your agenda around those points. Trying to cover more than three simply will dilute your efforts and the overall meaning of your visit will get lost.
  - Suggestions include: current success despite financial constraints, the need for consistent funding, etc.
- Clearly define the issue in terms that will resonate with the policymaker. Couch your arguments in support of your legislator's priorities.
  - Is he/she interested in global competitiveness? Economic development? Veteran transition? Show how your program supports these efforts.
- Make sure that all members of your group are prepared. Do not assume that everyone has experience or a comfort level in speaking with elected officials.
  - Make sure that your employer representatives have successfully used the one-stop to solve a staffing problem and are able to provide specifics
  - Job seekers need to be able to relate their personal stories. They do not need to be experts in workforce or quote national statistics.
- Prepare for the tough questions. Legislators are facing intense pressure to bring the federal deficit down and streamline programs. Be prepared to respond respectfully and professionally to comments such as:
  - Everyone has to share in the pain: Yes, but workforce has taken more than its fair share of cuts. In times of unprecedented long-term unemployment, now is not the time to cut programs that actually support economic recovery and employment. Has the recent round of funding cuts impacted your ability to serve your community?
  - There is no research that shows that workforce programs work: Federal investments in the workforce system show significant returns on investment, helping individuals get jobs, improve their earnings, and contribute to their local economies in countless ways. Research demonstrates that individuals who receive services through the workforce system show positive outcomes for both employment and earnings gains.
  - There are too many workforce programs: Of the 47 programs identified by the GAO, just 3 programs—WIA's Adult, Dislocated Worker, and Wagner-Peyser Employment Service programs—served more than 19 million participants, accounting for nearly 80 percent of the 24 million people served by the federal workforce development system. These three programs, the backbone of the U.S. employment and training delivery system, accounted for approximately 32 percent of total funding for employment and training activities in Fiscal Year 2009.

### **Host with Confidence!**

- Make it an event. Arrange to have satisfied customers available to speak to the legislators including employers and job seekers.
  - Have a Plan B if the legislator is late or cancels. Legislators sometimes have to change plans at the last minute, so be sure that you have a backup plan if you have invited media. Have your local elected official speak.
- Make sure that the center is busy during the visit so that the legislator can see how things really operate and why resources are so critical.
- Have your key statistics ready in a one page fact sheet that covers such areas as: the number of job seeking customers you see; how many get jobs; their earnings; how many customers you helped that are now off welfare; the impact you have had on unemployment in your community; number of businesses you serve; types of services; business outcomes; and how your One Stop has helped local economic development efforts.
- If you do not know the answer to a question, it is fine to say that you don't know the answer. In fact, not knowing the answer and promising to get back to him/her provides you an excuse to do our next step.

### **Follow Up!**

- Send a thank you note immediately to both the member and their staff. Too often we forget this simple step and it really goes a long way
- Send an e-mail with pictures from the event and post them on your website and Facebook page.
- Maintain an ongoing relationship with the staff. Put them on your distribution list for press releases and newsletters.
- Become their personal resource. Let them know that you can be used to provide insight into local condition and proposed legislation.