POWER TOOL:
Conducting Site Visits for Policy Makers and Influentials

Engaging policymakers on our issues and promoting pro-poor policies is a key approach for CARE in order to achieve the change we want to see in the world. However, it's not always easy to convey the importance and impact of CARE's work simply through a human interest story, photo, or video, especially when seeking the support of policymakers with competing priorities and limited time. CARE USA has found that one of the most effective approaches is to share CARE's work firsthand by inviting policymakers and those you are trying to influence to visit CARE sites as well as partner sites.

Since 2009, CARE USA has hosted over 200 U.S. policymakers and influentials to travel internationally with CARE and witness firsthand the importance of supporting CARE's issues through the [Learning Tours program](). This Power Tool is based on CARE USA's best practices and lessons learned conducting Learning Tours. While the Learning Tours is an international travel program, the tool below can be adapted to support in-country engagement with your local policymakers, donors, and others you are trying to influence.

Implementation Section:

The following section provides guidance on implementing a successful site visit based on CARE USA's Learning Tours program. While these are general good practices or elements to take into consideration when planning a site visit, the site visit will need to be adapted to each specific context.

Pre-trip Planning

1. Determine your post-trip objective:

The visits and trips with the strongest outcomes are those that are closely aligned with a strategic post-trip objective. The post-trip objective should be determined before the trip planning begins because it will influence many aspects of the trip/site visit. Your objective will be highly context-specific, but consider advocacy outcomes that would be beneficial to your work, further your advocacy agenda, or further CARE's mission. For example, consider inviting the Minister of Health on a trip highlighting your maternal and child health work if your post-trip objective is to increase the budget for maternal and child health, or inviting a potential donor on a trip if your post-trip objective is to cultivate their support for scaling-up projects. You can also consider inviting journalists with the post-trip objective of raising awareness and mobilizing the general public, or inviting Parliamentarians to visit a child marriage site and meet with beneficiaries if your post-trip objective is to change the legal age of marriage.

In April 2017, CARE hosted a Learning Tour to Nepal and India highlighting the importance of U.S. investment in foreign assistance. The delegation included Senator Jeff Merkley, Senator Chris Coons, Ambassador Alaina Teplitz, Ambassador Nancy Powell, Michelle Nunn, Michèle Flournoy, Mary Sorteberg, Liz Schrayer, Tom Mancinelli, David Ray, Rahul Mehta, Scott Morris, and Matt Rimkunas.

2. Determine your target audience and recruit a delegation:

Based on your trip objective, determine what policy influencers, policy makers, journalists, or funders are strategic to recruit for a trip or site visit. The individuals you recruit for your delegation should closely align with your objective, so make sure you're inviting either the decision-makers or senior advisors/staff to the decision makers. A stakeholder analysis can help identify the individuals you need to target to achieve your policy objectives. You can find more information on conducting a stakeholder analysis in the [CARE International Advocacy Handbook](), starting on page 16. Remember, you're spending your time and money on this visit and want to make sure it's worth it by targeting the individuals who can help you reach your post-trip objectives.

When determining the delegation you would like to recruit, consider the following:

- The ideal delegation size will depend on the trip (how many places you can feasibly go, your budget, where your targets are based, etc) and your objective, but delegations with 12 people or less are usually easier to manage and small enough to allow for everyone to discuss the issues and get to know each other.
- Consider the delegation cohesion and group dynamics. Are you bringing people with vastly different political views in one delegation? Are they all around the same level of seniority? Are they all around the same age or have you purposefully made it a diverse group? You want to ensure everyone will feel comfortable together, relevant to the issues they'll be learning about, and no one feels alienated.
- Considering making your delegations diverse, with technical experts, policy makers, journalists, funders, etc all mixed together. This can help folks think about an issue from a different perspective/sector and make for robust group learning.
- Consider having a senior CARE staffer, such as the Country Director, serve as the "trip host" and stay with the delegation throughout the trip to answer questions and help guide learning.

Once your list is complete, draft an invitation email or letter and circulate to the invitees. The earlier you can invite individuals, the better. People in power will be busy so getting this trip on their calendar as early as possible is crucial to getting them to agree to join the trip. Follow-up on the invitations and ask other well-connected folks to follow up as well and encourage your targets to confirm. Think creatively about other influencers who may have relationships with your targets. Recruitment is ongoing throughout the trip planning process.

3. Determine your theme and narrative:

A site visit should be well-defined by identifying a theme related to your advocacy goals. Once the theme is identified, establish a narrative framework or story arch that will connect the site visits to one another and to the larger theme.

- Trip themes and narratives should be closely aligned with the desired outcomes of the site visit (policy maker support for SRHR, policy maker adoption of a CARE program, etc). Identifying the desired outcomes of the site visit, or post-trip objective, will help drive how you plan the trip. For example, if your post-trip objective is to increase government investment in farmer field schools, your trip theme would be around food and nutrition security and your narrative could highlight the need for increased investment and the impact this type of investment has on the ground
- If you're planning a visit to multiple sites, consider building the trip like you would if you were telling a story: you want the sites to connect and build off of one another. Example narratives include:
    - Connecting Micro to Macro: Site visits start by looking at investments at the village and community level, then expand to the regional/national level;
    - Life of Woman: Site visits start by showcasing key interventions throughout a woman's life, starting with programming for girls and moving to adolescents then to new mothers and ending with the economic/social empowerment of women
    - Short-Term Emergency Response to Sustainable Development – Site visits start with food aid and short-term emergency assistance, then transition to developing the capacity of small-holder farmers, then linking those farmers to markets, then broader investments in developing a local agricultural sector.

4. Contact stakeholders to determine viable sites to visit:

If you're only visiting CARE sites, this may just mean discussing the trip with the CARE colleagues that are relevant to the trip theme. You should obtain recommendations for sites that showcase positive impacts of investment and/or show progress. Integrated programming that incorporate multiple sectors (women's economic empowerment and nutrition, or WASH and maternal and child health) are often more compelling than programs that focus on one sector or have just started.

Depending on your post-trip objective and theme, you may want to visit partner sites and engage other stakeholders such as USAID, UN agencies, donors, other partners, etc.

5. Once you have a list of potential site visits, conduct a pre-trip planning visit:

Visit the sites of most interest and that best reflect your narrative to determine which will be logistically feasible and what sites are best to include in the itinerary. You may need to bring field staff with you. The pre-advance is mostly about determining what is logistically possible. At this point, there is no need to mobilize entire communities, do a full site visit run through, or meet more than a couple of beneficiaries.

Aspects to note during the pre-advance:

- Respect for beneficiaries: The safety and comfort of beneficiaries should always be considered first and foremost. For example, will a group of all women beneficiaries feel comfortable discussing sexual and reproductive health with a group of men? Are stories of gender-based violence uncomfortable/traumatic for the beneficiaries to share? Are there religious holidays that might conflict with the date?
- Ensure the site fits your theme and narrative
- Are the beneficiaries dynamic and vocal, and will they be comfortable speaking in front of a group of policymakers?
- Security: is the site visit and transportation to and from the site visit safe?
- Drive time and road quality. We generally recommend no longer than 2.5 hours in the car.
- Interpreters needed (Multiple translations with multiple languages makes sites more difficult)
- Political sensitivities for your group. For example, bringing a conservative policymaker to a health clinic that refers for abortions.
- Is the site visually compelling? Sites with potential demonstrations, clinic visits, village tours, etc are always more compelling than sites with only dialogue.
- Nearby bathroom options

6. Develop an itinerary:

Following the pre-advance, develop an itinerary that includes the site visits you want to include in the policymaker trip.Be sure to include meals, travel, and time for discussion in the itinerary.

Aspects to keep in mind when developing the itinerary:

- Incorporate time to brief the group on the theme in order set the context before they visit the sites. You can also brief the group on the specific sites before they visit. The site visits can be loud and busy so it is important to explain where you are going/what you will be seeing before you arrive at the site.
- Ensure the itinerary reflects your theme, matches your narrative, and will further your post-trip objective. The biggest priority should be developing an itinerary story that will have your group arrive at the understandings and conclusions you want by the end of the trip/visit.
- Allow for ample drive time. Remember moving in a convoy with many vehicles takes longer than traveling by yourself.
- Consider when your delegation will eat meals, if applicable. Boxed lunches in cars are always an option if it's a full or multi-day trip. You can take snacks and bottles of water for the trip.
- Incorporate time for the group to debrief and discuss take-aways after the site visits.
- Schedule bathroom breaks, if relevant

7. Finalize your agenda with the relevant stakeholders.

Once you finalize the agenda, inform relevant partners and/or staff of the date and time you will be visiting their site and confirm it will work for them. Be clear about the expectations and the plans with the relevant partners and/or staff.

For security purposes and to ensure the privacy of the guests is protected, you may not want to share the full agenda with others.

8. Develop the trip materials:

Develop briefing materials for the policymakers in order to provide background on the themes and sites before they travel. Share these materials with the delegation at least a week before the visit so they can read and gain context prior to the visit/trip.

- Learning Tour briefing books are quite long, but these can be as extensive or concise as necessary based on the trip.
- Rely on partners, program staff, or other relevant parties to share factsheets and background information.

Consider including information on:

  - The programs the delegation will be seeing
  - The agenda for the trip and individual site visits
  - Background on each policymaker and/or CARE or program staff who will be accompanying the group
  - Broad context on the issue you're exploring

    - Background on the governmental, organizational, or international policy relevant to the issue
    - Additional background information that will help frame the issue and bring the delegation to your trip objective.

9. Conduct another pre-trip visit to the sites:

Schedule a pre-trip visit a week before the actual site visit. This allows you and your team to see how the site visit(s) would go when implemented. It will highlight any logistical challenges such as the timing, travel arrangements, as well as confirm if the itinerary supports the intended narrative.

- You should return to each site that will be part of the actual visit no more than a week prior to the actual visit. Advancing too early won't give you an accurate sense of road condition, weather, community presence, etc.
- During this time, meet as many beneficiaries as possible and go over what the visit will actually look like with the partner/staff and beneficiaries.
- On the advance, identify:
    - Who will provide opening context and brief the group on the project?
    - Which beneficiaries will speak and what will they talk about?
    - Where will the presentations and engagement physically happen?
    - Any pitfalls/concerns

10. Develop 'Run of Shows':

'Run of Shows' is a document that is shared with all relevant personnel which contains details about each part of your visit including timing, responsibilities, etc. This ensures everyone is informed and on the same page.

Things to consider include:

- Based on the pre-trip visit, you should develop a run of show for each site visit and share with all necessary staff beforehand so everyone is on the same page about how the visit will go.
- The goal is to make sure the visit is organic and doesn't feel staged. At the same time, rehearsing the visit to ensure things go smoothly is critical.
- In drafting the run of shows, consider who is attending the site visit and the issues they're interested in to ensure they are being highlighted.
- Aspects to consider when developing a run of show for site visit:
    - Avoid PowerPoint presentations and long briefings. We recommend a maximum of 1.5 hours at a site, but longer can work depending on the site.
    - Ensure there is ample time for delegates to ask questions and engage directly with beneficiaries.
    - Provide seating options, particularly for longer site visits and for older participants. Make sure there are chairs/ local benches available for those who would like to sit.
    - For photos/videos, it's best to get delegates as close to beneficiaries as possible. If photos/videos are important for your site visit/trip, be sure to consider the lighting and the surroundings for comfort. Site visits that are indoors in a very dark room is not ideal for photos/videos, while outside a clinic under the shade of a nice big tree is ideal for comfort and provides better lighting for a camera crew.
    - It's really important for delegates to see beneficiaries in action (like farmers tending to the field or health workers providing care to a patient), so make sure an activity is going on. Try to weave in a hands-on activity for delegates to get them more engaged. For example, if the site visit is nutrition-related then a policy maker can help weigh the baby or they can join community health workers on their home visits.

Trip Implementation:

1. Finalize all logistics a day before the site visit/trip:

A day or two before the actual site visit(s), ensure all logistics are finalized and prepared including travel logistics, site logistics, and meal logistics. Make sure you have the necessary medical and emergency contact information for each delegate before the trip begins, and have this information as well as contact numbers for all staff, drivers, and translators, with you at all times. Ensure the vehicles are adequately prepared since vehicle issues can pose a security risk. Things to consider include:

- You'll want to inspect the quality of each vehicle and meet each driver before the site visit, ideally these are the same drivers who joined the pre-advance and advance.
- Routes should be agreed upon and known to each driver and staff. Identify backup routes as well as in case something goes wrong. You'll want to use the same drivers as the pre-advance and advance so they are familiar with the site locations.
- If using multiple vehicles, consider taping a visible label to the inside of each car including A (advance car), 1, 2, 3, etc. so drivers know exactly what order they should be in and to stay together.
- Consider including a cooler with cold drinks and/or a basket with snacks, tissues, sunscreen, hand sanitizer, mosquito repellent, etc. in each vehicle depending on how long the day will be.
- Decide who will be riding in what car beforehand to reduce confusion.

1. Conduct an 'advance' site visit:

An 'advance' visit is when a staff member visits the site at least 30 minutes to an hour before the delegation arrives in order to prepare the site and ensure everything is in place before the group arrives. To advance a site, assign a staff member to arrive at each site before the group to gather the community, let site staff and beneficiaries know the group is on the way, go over any last minute changes, and ensure everything is set up and ready to go. The advance staffer should be a staff member who has the skillset to be creative and problem solve on the spot. Something always comes up.

2. Now it's time to implement the site visit!

When it is time to implement the actual site visit with the delegation, one staff member should be with and leading the delegation at all times and, if possible, riding in Car 1 alone so that they can openly communicate with advance staff and help problem solve out of view of the group, if necessary. Your trip host should be thinking about the trip objective and how to weave in your points throughout the visits. The trip host should also start discussing follow-up activities with delegates throughout the visits. If they are a part of the follow-up brainstorming, they'll feel more invested to take those next steps.

Additional aspects to consider when implementing the site visit(s):

- Instruct staff that if any problems/complications occur during the actual trip to speak discreetly about it and never in front of delegates. Be all smiles and set an example.
- Pay attention to the clock! You need to keep things moving at all times. If people want to stay longer, pull staff aside and find out how this will impact the rest of the day, such as meals, safety while driving if it is getting dark; etc.
- Make sure to have dynamic translators who are briefed on the projects that are being showcased so that they know what they are talking about. Make sure the translator is situated near the group so they can hear clearly.
- Be ready to engage people during car rides and use this time to debrief and answer questions. If possible, place staff in each car in order to facilitate discussions. If members of the group want to sleep, that is fine too. Continually take the pulse of the group, and respond accordingly.
- It is very important to limit the number of staff (both CARE staff implementing the trip and program staff) so that the group has the opportunity to interact directly with the communities.
- Avoid having too many people take pictures during the site visit(s). You want the group to be engaged in the actual site visit, and not distracted by taking photos. Hire a photographer or designate one staff member to take photos of the visit, and let the group know you will share the photos with them so they can focus on the site.
- Use car time strategically. Drive time is often the most opportune moment to start discussing issues and your objective with the delegation. The trip host should be in the car with the most strategic delegates.

Trip Follow-up

1. Send a thank you letter or package to delegation:

Following the conclusion of the site, send a thank you letter or thank you package to the delegation. Depending on the delegation and what's appropriate, this could be as simple as a group email or as formal as a letter.

The thank you letter should show your gratitude for the delegation taking the time to visit the sites, reference some of the key themes and learnings from the visits, and generally prepare the group to be engaged around your post-trip objective.

2. Finalize and share post-trip deliverables as quickly as possible after a site visit:

CARE's Learning Tours Program compiles a trip report which outlines everything the delegation saw. An example trip report can be found here. Share all photos or videos as soon as they're ready, and be sure to caption the photos with the name and description of the site visit so the policymakers can reference them in the future.

Immediately following the trip is a good time to publish any media outputs such as press releases. A sample press release can be found here. If you choose to do a press release, you should have it ready to publish immediately after the visit. Do not post before or during the trip for security reasons. If there was additional information requested or questions that couldn't be answered during the site, this is a good opportunity to address them and close the loop.

3. Organize a follow-up event(s):

An appropriate follow-up event will all depend on the trip objective, theme, and group. Consider planning a dinner, meeting, or other engagement within a month after the trip to keep the group engaged. Notify the group that an invitation for a gathering is coming soon.

Enthusiasm generated by trips can wane quickly, so you need to strike while the iron is hot. The group will be excited after seeing a project or meeting beneficiaries and you should have your asks and follow-up activities ready within a month of the trip.

4. Refine and implement the follow-up plan for each policy maker/influential:

A site visit/trip should be the beginning of a relationship and that relationship will be sustained by consistent and strategic follow-up. As you develop your follow-up engagement, be sure it aligns with your post-trip objectives and consider various ways to leverage your new relationship such as co-hosting an event with the policymaker about their visit/ the visit's theme, co-publishing news articles, working with them to recruit other policymakers for future site visits, etc. Consider hosting periodic gatherings or informal get-togethers with delegates in order to develop lasting and friendly relationships.

The trip/site visit participants often want updates on the program participants that they met and the sites they visited. If appropriate, share a quarterly update/newsletter but be sure it connects with your post-trip objective. For continuous engagement, you and your team can also share relevant articles, news or program updates with the group as they arise.

Potential Challenges and Risks

You should expect that things will not go as planned. The longer the trip and the more sites you visit, the more likely that something will come up and change the plans. Anticipate and prepare for pitfalls along the way as much as possible by having items on hand that you may need and by developing communication plans with your staff members. If and when something goes wrong, stay relaxed and think on your feet. If you're calm and enjoying yourself, so will the group.

Common pitfalls include:

- A vehicle breaks down -> If possible, have an extra vehicle or enough room in the existing vehicles so that you can fit everyone into the other cars and keep moving.
- Bad weather -> If possible, have ponchos or umbrellas on hand for VIP guests and a back-up location that is inside.
- A delegate gets sick -> If possible, have a travel medic with the group at all times and/or know the nearest clinic/ hospital at all times. Have basic medicines with you such as pain-killers.
- Community difficulty -> Security should always be top priority. If something feels off in a community or things get tense, it's okay and recommended to leave early.
- Too many unplanned people at a site visit -> Keeping the agenda and names of important policymakers close to you and your team will help keep a low profile and mitigate against unplanned visitors. Notify your partner organizations and staff that the visit is sensitive information to ensure they do not unintentionally share with others.
- Staff member or beneficiary goes off script -> Only jump in if it's going really wrong or you think the group won't understand the visit without some added clarification. You can always follow up after a site.

Key Lessons Learned

While the above provides guidance on how to implement a successful site visit, this section provides the main lessons learned and general best practices to take into consideration.

- Trip alignment is key. Your post-trip objective should guide who you recruit for the trip, how you define the theme, what you include in the agenda, and what type of follow up activities you plan. The most effective visits have clearly taken the post-trip objective into account at every step of the process.
- Logistical staff should be in the background making sure everything is going according to plan and dealing with any issues that arise, so make sure you include staff to meet this need in your staff planning.
- At least one staff member should lead the trip and should always be visible to the group, but generally you want to let the program staff and especially program participants have the spotlight. The lead member should not have a large speaking role at the sites.
- Always be conscience of cultural and gender issues that may arise between the group, the translator/photographer, field staff, and the program participants and plan accordingly so that everyone is comfortable and feels respected.
- Be cognizant of weather and time of year as this can affect travel to and from sites and the comfort level of visiting outside sites.
- Depending on the context, consider informing local authorities of the visit.
- Take great notes. Designate a person to take notes which will be used for follow-up. Make sure the notes which includes the names of speakers and program participants, quotes, locations and any information that will be relevant for a trip report, media piece, photos/videos, or any post-trip materials.
- Have clear roles and responsibilities for all staff involved.
- Go through a detailed minute-by-minute overview of the day with all staff before each day to be clear about individual responsibilities as well as a general understanding of the day.
- Social media: For security purposes, never post live because of the ability to track the location of posts. Otherwise, use media and communications as you and the policymakers are comfortable to promote the trip and the great work being done on the ground afterwards

Case Study

In February 2015, former U.S. Representative Renee Ellmers (R-NC-02) travelled with CARE on a Learning Tour to Guatemala to see firsthand how U.S. investments are improving family health outcomes for vulnerable populations and addressing the most pressing health challenges, particularly for women and girls. Representative(Rep.) Ellmers was invited to participate in this trip due to her influence in Congress among her peers, particularly as part of the Republican Women's Policy Committee and, therefore was identified as a policymaker who could advance CARE's sexual and reproductive health agenda.

In the weeks immediately following the Learning Tour to Guatemala, CARE worked with Rep. Ellmers and Rep. Diane Black (R-TN-06) who also participated in the Learning Tour to draft an op-ed published in *The Washington Times* on their experience visiting health programs in Guatemala titled, "From nurse to nurse: let's help women build stronger families." In the editorial piece, the Congresswomen argued: *"We're often asked why it is so important to devote time and attention to health programs in countries so far away. As two nurses with experience in the health realm, we can confidently state that it's because we know what works. Proven interventions such as educating mothers on the importance of proper nutrition and timing and spacing of pregnancies can make a difference. Our time in Guatemala showed us that many of these interventions are both simple and inexpensive."*

CARE continued to engage Rep. Ellmer's office following the trip. A few weeks after the trip, Rep. Ellmers met with Rep. Granger to discuss Republican support for international family planning following CARE's recommendation. In June 2015, CARE co-hosted a grasstop luncheon in North Carolina with Rep. Ellmers to highlight her experience on the CARE Learning Tour to Guatemala. CARE partnered with the Bill and Melinda Gates Foundation, Hope Through Healing Hands, the Kyle House Group and the Triangle Global Health Consortium to execute the event. The luncheon was attended by approximately 30 influential global health leaders from the Research Triangle, including representatives from GlaxoSmithKline, IntraHealth International, Duke Global Health Institute and RTI International. Learning Tour alumni Tom Walsh and Jenny Dyer also participated in the event and Rep. Ellmers posted about the event on Facebook.

In March 2015, the CSIS Global Health Policy Center and Hope Through Hands hosted a book launch event, "The Mother & Child Project: Raising Our Voices for Health and Hope." Reps. Ellmers and Black spoke at the event where they discussed the Learning Tour to Guatemala. Rep. Ellmers' opening remarks focused on the importance of addressing maternal and child health – "we understand the importance of healthcare for moms and their children is an issue for all of us to stand behind." Throughout her speech, she reflected on her Learning Tour experience and the need to see programs on the ground to fully understand how people are affected by international foreign assistance. Rep. Diane Black offered remarks at the end of the event where she spoke of traveling to Guatemala on roughly 15-17 previous occasions. However, CARE's Learning Tour presented a completely different experience, as she was able to meet with people in rural communities and learn about maternal health issues in a specific context.

In April 2015, CARE, along with representatives of the United Methodist Church and RESULTS, met with Pat Fitzgerald, District Director for Rep. Ellmers in order to introduce the office to CARE's work and the issues impacting mothers globally. Pat expressed her gratitude for the opportunity that the CARE Learning Tour to Guatemala presented Rep. Ellmers and spoke at length about her support for global maternal health and women's and girls' empowerment. The delegation urged for the Rep. Ellmers to be a lead cosponsor of the Reach Every Mother and Child Act of 2015 - S.1911. In addition, CARE and partner organizations worked with Rep. Ellmers to send a private letter to appropriators opposing cuts to family planning and maternal and child health programming during the FY16 budget process.

Currently, Rep. Ellmers serves as a regional director in the Department of Health and Human Services in Atlanta, Georgia and continues to influence health policy in her new role.

Additional Resources

Additional information about the CARE Learning Tours can be found at the links below:

- CARE Learning Tour Website
- CARE Learning Tour Trip Reports
- CARE Learning Tour Press Releases
- CARE Learning Tour Alum Testimonials