



Conducting Congressional Staff Field Tours

A supplement to *Communities and Forests*, the newsletter of the

Communities Committee of the 7th American Forest Congress

In summer 1999 the Communities Committee of AMERICAN FORESTS co-sponsored two congressional staff field tours, in northern California and northwest Montana. The tours looked at rural community-based forest stewardship and provided us with hands-on experience in planning and conducting a congressional field tour.

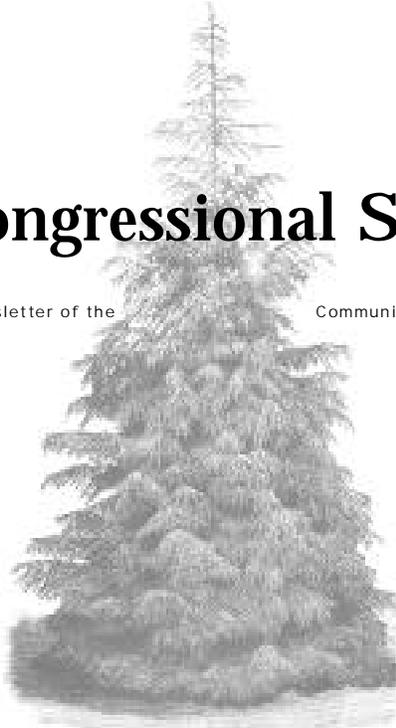
In this Quick Guide, we share our experiences to help other communities that might consider planning and holding their own tours. We hope this Quick Guide inspires you to take action and show off your accomplishments, help bring congressional focus to problems in your community, and build your community's capacity to express its own voice in national policy issues.

If your community has a particularly vivid and compelling story to tell, you may want to consider hosting a field tour for staff members from key congressional offices or committees. That gives you an opportunity for extended, one-on-one discussions with the people who draft or review pertinent legislation, analyze its fiscal and policy impacts, and advise members of Congress with whom they work. Best of all, you get to show tour participants what you're doing and why—and seeing often is believing.



WHAT IS A FIELD TOUR?

If you have an ongoing community forestry program, you probably already organize field days to explain your work to the media, community groups, students and others. A congressional staff tour is similar, although usually longer and more focused on national policy issues rather than site-specific treatment prescriptions. Tours can be an educational activity rather than a lobbying effort, an opportunity for both congressional staff and community participants to learn more about each other's views and concerns. Most impor-



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tours do not end when the participants climb out on the airplane. The relationships and the learnings launched during the tour should be diligently pursued and nurtured in the future.



GETTING STARTED: WHAT DO YOU NEED?

Partners

Working collaboratively, local and national organizations need each other.

Having a Washington, D.C.-based co-host, or one with excellent connections there, can make the tour much easier for local groups. By partnering with a national organization that knows the D.C. players, you can capitalize on their relationships and focus on take-home messages with broad national appeal. A good D.C. partner will know the key people to invite and will be willing to personally persuade your invitees to attend. By working with a national organization, a local group can show how its experiences fit into a national policy context and that it has support among interest groups frequently dominating the national policy dialogue.

For national organizations, a local host is critical. A local host has intimate knowledge of on-the-ground conditions, local leadership, and issues confronting the community. The local host is vital to preparing presenters and ensuring that tour logistics go smoothly. It is critical that local and national organizations work together to ensure that the tour represents a diversity of people and perspectives. Having diversity will bring credibility to the group and provide a more balanced look at the issues, ultimately resulting in better dialogue during the tour.



Possible local co-hosts and sponsors might include other collaborative forestry groups, environmental or conservation groups, businesses, local governments, organizations and associations, and concerned individuals. Not only can they help by providing staff support, tour buses, refreshments, meeting places, and more, but their involvement is important in ensuring community “ownership” of the tour.

Time

Yours—A successful field tour may last only two or three days, but it takes a lot of planning and preparation time. In addition, its long-term effect will be diminished unless you are committed to diligent follow-up efforts.

Theirs—Your tour should be held when congressional staff do not have conflicting responsibilities in Washington, D.C. During the summer recess usually is best.

Money

Funding—There are many ways to conduct a field tour. Some organizations hold elaborate luxury tours, organized like those on the lobbying circuit. We chose to make our tours reflect the communities that the congressional staff would be visiting, keeping the accommodations, meals, and travel arrangements simple and cost

effective. We opted for a small group—no more than 10 congressional staff and 20 local participants—to facilitate genuine, open dialogue and learning.

Depending on your objectives, your tour can be fancy or simple. Your choice will affect your costs. You will be expected to cover congressional staff members’ travel, hotel, and meal costs, and it is important to plan accordingly. Also, it takes several months of work to put together a tour, so when budgeting we recommend providing for a paid staff member to coordinate the event. Interns are also a valuable asset for this type of event. Our tours were funded by private foundations and in-kind support from many local public and private institutions.

Ethics Committees

Congressional staff must clear all travel with the appropriate ethics committee. The Senate Select Committee on Ethics (Room SH-220, Hart Senate Office Building, Washington, D.C. 20510, telephone 202-224-2981) reviews the length, purpose, and content of any tour a Senate staff member proposes to attend to determine if it is appropriate. The House has a similar body, the Standards of Official Conduct (Ethics) Committee (Room HT-2, U. S. Capitol, Washington, D.C. 20515, telephone 202-225-7103). The

PLANNING YOUR TOUR BUDGET

When planning the tour budget, include at least the following:

1. Staff time—your time and that of support staff
2. Travel—to, from, and around your area
3. Transportation and airfare to/from Washington, D.C., or the participants’ home states (or mileage for those who choose to drive)
 - Transportation to and from your closest airport
 - Buses, vans, or other field tour transportation
 - Mileage for local participants to enable their attendance
4. Lodging and meals
 - Hotel/motel rooms for congressional participants and local participants needing accommodations
 - Breakfast, lunch, and dinner for all participants
 - On-tour snacks and beverages for all participants
5. Materials and mailings
 - Printing/copying
 - Binders, folders, and other supplies
 - Postage to send materials to participants
 - Thank-you letters
 - Printing of reports and photographs

A successful tour depends upon cooperation and help from many people. Before you send invitations, make sure you have the necessary local buy-in and support. Since planning a tour will be a new experience for most local groups, you should present a clear picture of the purpose of the tour and what you hope to accomplish. Providing a budget and tentative tour schedule will help. Once you have the commitment, you should nail down the funding. Anyone you ask to contribute will want to know how you expect the tour to advance the goals of your community-based forestry program.



Committees rules are not exactly the same, so if your tour involves both House and Senate staff members, you will need to be aware of and observe the rules of both.

Although not required, we asked the Senate Ethics Committee to provide us with a letter stating that our tour complied with ethics rules. As a convenience, when we sent our invitations, we included this letter and the form staff members must complete when they return from a tour.

Choosing the participants

There is no “right” size for a tour group. It should be large enough to include a good cross section of local interests and congressional staff members but small enough to facilitate good group discussions. Invite:

1. Congressional staff—Consider the people responsible for natural resource issues in your congressperson’s office, people with similar responsibilities in the offices of other members of your state’s delegation, staff members of key committees (House Resources, Senate Agriculture, Nutrition and Forestry, and so on), and staff members for congresspeople on key committees (House and Senate Appropriations, for instance), whether or not they are from your state. Have back-up names available in case some of your first choices aren’t available. A good rule of thumb is to prepare a list with twice as many people as you expect to accommodate. We found it extremely helpful to have both Democrats and Republicans, personal and committee staff participate in the tour.

2. Local collaborative participants—You will want an articulate and knowledgeable core group to attend (if possible) all scheduled activities. This group will ensure continuity in the discussion and contribute enormously to the relationship-building aspects of the event. Other collaborative members should be encouraged to participate as well, to the extent that your transportation and meal arrangements will accommodate larger numbers.

3. Local forest workers—Loggers, log haulers, tree planters, thinners, special forest product harvesters, mill workers, fire specialists, wildlife managers and researchers, and others doing the actual on-the-ground work of community forestry are likely to be the “stars” of your tour. Congressional staff often gets secondhand information (from lobbyists, interest group leaders, and others) about what forest workers think, want, and do, but they seldom have an opportunity for direct interaction. A tour is a unique opportunity for workers to tell their own stories. It is especially helpful for these participants to express their perspective in the woods, where their presentations can be related to specific on-the-ground examples.

4. Environmental organization members—These people may be members of your collaborative, part of your multi-party monitoring pro-

gram, or concerned observers. You also may want to invite national or regional environmental groups to participate to help build understanding between local and national efforts.

5. Industry and union representatives—Depending upon the situation in your area, this group of invitees might include mill owners and operators, logging and woods products association staff members, and mill or harvesters’ union representatives.

6. Government officials—As appropriate, include county supervisors or commissioners, city parks or forestry department members, state natural resource department managers, and concerned federal agency representatives (Forest Service, Bureau of Land Management, Environmental Protection Agency, others).

7. Media—Whether or not to include media can be a tough decision. You want your activities open and transparent, but you also don’t want a situation where tour participants are tempted to create “sound bites” for the evening news rather than engage in frank and open discussion. A reasonable middle ground may be to build a short press conference into the tour agenda. We had one reporter attend each field tour and asked that s/he attend the entire tour to ensure a complete picture. You can also have the whole tour off the record to establish a relationship or educate a reporter on the issues—or set ground rules for how information is used.



ISSUING THE INVITATIONS

Ideally, you should personally invite congressional staff to attend the field tour, hand delivering an invitation with relevant attachments. This is when your DC-based partner will come in handy. A less desirable approach is to invite people by telephone, but it is still much better than a letter with no personal contact.

Even after you have met with a staffer and confirmed her interest you should continue to follow up to confirm attendance. Polite persistence is key to getting congressional staff to attend. The invitation packet should contain the following:

1. Who you and your partners are
2. Where the tour will be (brochure, map)
3. Why the tour is being held
4. Why the particular individual is being invited



5. What the staffer can expect to learn
6. Draft itinerary, including dates
7. Explanation of costs you will cover (travel, meals, accommodations)
8. An offer to purchase airline tickets. (Purchasing at least 21 days in advance will save money, but make sure you have a firm commitment to participate before buying the ticket.)
9. Accommodations—location and description (include a brochure, if available)
10. A reply form the staffer can use to accept or decline your offer and to indicate any special interests (things to see, issues to explore) or needs (vegetarian diet, handicapped accessible rooms, etc.)
11. Your deadline date for acceptance (far enough in advance of the tour so that you can still invite someone else if your original invitee declines)
12. Request that, if the staff member is unable to attend personally, s/he provide names of others who might benefit from the experience
13. Who to call for further information (include telephone, fax, and e-mail address)

In addition to congressional staff, invite the local and regional people you want to make presentations, guide on-site tours, or add their voices to discussions. Again, extend your invitations personally and follow up with a similar information packet. If at all possible, offer to pay these participants' expenses (meals, travel) as well.

Keep following up, in person or by phone, until you get an answer from your invitees. In your own schedule, set a date for a "go/no-go" decision. If you don't get enough acceptances to make the tour expense and effort worthwhile, or if you can't get the people you want or need to make the trip successful, be prepared to call it off.

Unfortunately, because of the hectic schedules of most congressional staff members, it is quite possible that one or more of your expected participants may not show up. If you have not heard from staffers about a change in plans, call their offices to confirm they are not just delayed.



PLANNING THE TOUR

The substance and flow of the itinerary should focus on the issues and programs you want Congress to address in setting forest policy and making appropriations decisions. Use the successful public speaker's approach—first tell participants what you are going to show and tell them during the tour. Then show and tell them with a series of project visits and presentations, and finally, in the wrap up, reiterate what you have shown and told and ask them to respond. In choosing focus areas we recommend that you focus on something important to your local community but that also fits into a larger national agenda or has implications for other communities in your region or nationally.

Planning the route

We recommend that once you select the sites, you drive the route and check the following:

1. Time between stops. Allow ample travel time to and from field sites, and have a "Plan B" in mind for inclement weather (providing rain gear or holding discussions indoors instead of in the woods or on the street).
2. Local road and bridge construction schedules on the dates of your tour. Also, note narrow routes, low bridges, and weight restrictions.
3. Shade. Whenever possible, try to select stops where discussion can take place in the shade or under some type of shelter. This will help protect people from sun, wind, or rain.
4. Each stop should visually illustrate your point. Consider the sequence of stops to ensure you can build on each stop as you proceed. We found that stops that showed a "before and after" re-enforced the message effectively.

WHAT YOUR AGENDA SHOULD INCLUDE

1. Overview session
 - Welcome and introduce participants
 - Set the context with a slide show/presentation discussing the community and its ecosystem and the forest-related problems and issues of concern
 - Explain how each activity on the agenda is designed to illuminate those problems and issues
 - Clarify your expectations for the tour—what you hope to accomplish



2. Formal presentations—as opposed to informal discussions.

- What topics should be covered?
- Who should present?
- How long should presentations last? The shorter, the better.

Encourage presenters to provide only essential information and to tie it clearly to the problems and issues identified as the subject of the tour. The idea is to better inform tour participants, not to make them experts about your program.

- Prepare “Leading questions” in case the post-presentation discussions need a push.

3. Time for conversation—Allow ample of time for discussion, and make sure congressional staff members don’t talk just to each other.

Encourage congressional and local people to mingle and talk at meals, during rides to and from field sites, at breaks, and more.

4. Free time—Don’t overload the agenda. Especially in the evenings, make sure congressional staff have some time to relax.



TOUR LOGISTICS

Planning the tour

1. Use a mix of activities (indoor presentations, outdoor site visits, meal and break times) to tell your community’s story and to keep participants alert and interested.

2. Consider various transportation options—motor coaches, buses, vans, or others—comparing costs, insurance, and use restrictions.

Some bus and car rental agencies do not permit vehicles to be used off-road or on unpaved roads. Make sure your drivers know where they are going, especially if you will be traveling off main roads. Provide good maps.

3. Keep driving times as short as possible, and identify places and activities of interest to be pointed out along the way.

4. Schedule frequent rest stops, and provide mid-morning and mid-afternoon snacks. Have a supply of bottled water and other beverages available at all times.

5. Allow enough time for leisurely meals. A lot of good discussion occurs over a second cup of coffee.

6. Prepare a list of important phone numbers (emergency #'s,

presenters, the caterer or the restaurants where meals are being served, and more.) so you can call ahead if you get off schedule.

Have a cell phone with you.

7. Make sure you know about and have provided for any audio-visual aids participants will need.

8. Confirm all arrangements in writing: time, place, number of people, cost, and responsibilities.

9. Do a “dry run” of presentations to ensure that speakers’ messages will be on target and within time limits. This is probably the most important pre-tour activity that you will do. Having a conference call or meeting in-person allows all the tour presenters and participants to understand the flow of the tour and when certain issues are going to be discussed. A “dry run” also works out timing issues, reduces surprises, and helps the presenters and hosting community unite around the message.

We organized our stops around specific themes. This gave each presenter a time when they had the spotlight and helped everyone understand how to support the discussions that followed. We strongly advise that if you are partnering with a national organization that you invite your distant partners to partake in this part of local planning.

10. Discuss in advance how to handle discussions where consensus does not exist among participants or the tour sponsors. Explain that differing opinions exist, and that the group feels it is important have all views expressed.

11. Remember to focus on the message. You do not need a uniform point of view, but you do need to keep the discussion focused. The tour is not the time to air “dirty laundry.”

Special Considerations

1. Alcoholic beverages—As tour hosts you need to determine whether you want or can use your grant funds to pay for alcoholic beverages.

We chose not to pay for alcohol and most participants were very understanding. We did, however, make transportation available to attendees to purchase their own liquor at the local grocery store, liquor store, or bar.

2. Non-business-related activities (fishing, sightseeing, city tours, and more.)—Offering a short sightseeing excursion or recreational activity during a free period or before or after planned activities may make the tour more inviting to potential attendees. Generally, however, your funds and time should be spent on tour-related activities.

Congressional participants may want to schedule vacation time before or after the tour, perhaps bringing their families. You can be



helpful to them in making arrangements. We chose not to do so. Most staff understood and appreciated the time that community

members donated to be there.

The pre-tour packet

Congressional staff probably will not have time to read your background materials until they are the plane, so the packet should be designed for easy use. A three-ring binder is ideal. It should include:

1. A narrative orientation to the tour area and existing community forestry programs
2. Area maps and descriptions of projects to be visited
3. A copy of the final itinerary
4. Participant and presenter bios and contact information
5. Pertinent articles or other information that addresses the main issues to be explored or help set the tour into a larger policy context
6. Information about accommodations (address, fax, telephone #s)
7. Emergency telephone numbers in case of missed flights or other problems

Local participants should receive complete packets as well. These will show them what congressional staff have been given as background and clarify questions on the tour.

After we completed our tours, many local groups said that having a complete copy of the packet helped them during the tour, but also afterward when members of their community asked about the tour. The advance packet works as an effective communication tool. The California tour packet also included presentation summaries, which people found helpful before, during, and after the tour.

Conducting the tour

1. Watch the clock. Stay on schedule if at all possible.
2. Watch the participants. Are they engaged? bored? bewildered? Are local folks and Congressional staffers mingling?
3. Fill in gaps and help guide presentations and discussions if they start to wander
4. Have one of the facilitators keep track of unresolved issues and questions to be addressed at a later time.

5. Keep reinforcing how particular sites or discussions relate back to the tour's main themes.

6. Make sure conversation is not all one way; that is, ensure that at some times during the tour (at the wrap-up session and elsewhere when appropriate) the congressional staffers are asked how, specifically, they could contribute to solving the problems and issues identified.

7. Be prepared to punt. If something doesn't go as planned, just deal with it. Don't worry about fault.
8. Keep your sense of humor and smile.

Post tour

1. Send a thank-you letter to each guest and presenter.
2. Congressional staffers will need (ASAP) a record of what you spent on each of them (transportation, lodging, meals), they need this to turn in with their report to the Ethics Committee.
3. All participants should receive a tour evaluation form.
 - A stamped, self-addressed return envelope will increase the return rate
 - Include questions that will help you find out how well this tour went and how to make the next one better
4. Do a de-briefing with local participants, and send them a summary of the written evaluation results.

Long-term follow-up

1. Stay in touch with participating Congressional staffers.
 - Be concise when you call or write
 - When possible, relate your comments to something they saw or heard on the tour. Doing so will add context and help them relate to how the issue affects real people and places
2. Keep participants briefed on what you are doing—the feedback you received about the tour and the problems identified. Send articles, newspaper clippings, newsletter items, and other relevant materials.
3. Ask participants what they have been doing
4. Make suggestions about what participants could be doing.
 - Be specific
 - Make it as easy as possible for them to do what you want. Offer assistance with formulating legislation, finding people to testify, and more.
 - Be positive and proactive. Don't criticize without offering an alternative solution.
5. Don't expect too much too soon—but don't expect too little.



Acknowledgments and Credits

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This Quick Guide is one of a series of policy tools developed by the Policy Task Group of the Communities Committee of the Seventh American Forest Congress. Please direct comments to any of the people listed below. All members of the Communities Committee are welcome to join this task group.

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