



NATIONAL PHOTONICS INITIATIVE

HOSTING A SUCCESSFUL CONGRESSIONAL VISIT

**A “HOW TO” TOOLKIT
JUNE 21, 2013**

TABLE OF CONTENTS



- BEFORE THE VISIT1
- DURING THE VISIT5
- AFTER THE VISIT6
- FACILITY TOUR: DOS7
- FACILITY TOUR: DON'TS8
- CONTACT INFORMATION9
- SAMPLE INVITATION LETTER 10
- SAMPLE MEDIA ADVISORY 11
- SAMPLE CONGRESSIONAL VISIT SCHEDULE 12
- SAMPLE PRESS RELEASE 13
- SAMPLE THANK YOU LETTER 15
- SAMPLE OP-ED 16

HOSTING A SUCCESSFUL CONGRESSIONAL VISIT

A “How To” Toolkit

Inviting your members of Congress to tour your business, university or place of work (herein referred to as “facility”) is one of the best ways to show him or her firsthand the impact of photonics in their district and/or state. A planned out and well-orchestrated tour will help accomplish both the goals of the National Photonics Initiative (NPI) in Washington and your goals at home. This how-to guide will assist you and provide details on every aspect of the tour and the process for getting started.

BEFORE THE VISIT

*Task
Completed*

1. Identify your federal legislators

Your facility should be represented by one representative and two senators. Keep in mind that if your facility is situated on or near a congressional the district line, you may have employees from multiple congressional districts. In this case, you may want to expand your reach beyond the members of Congress who only represent your facility to those who also represent the interests of your employees.



2. Identify upcoming federal recess periods

Members of Congress travel in and around their home districts during certain times of the year. These “recess” periods are the best time to invite your members of Congress to visit your facility. Congress is usually in recess during most federal holidays. Longer recess periods revolve around Presidents’ Day, Easter, Memorial Day, 4th of July and the entire month of August. In election years, Congress tends to adjourn in October, leaving the rest of the fall open for visits. In addition, Congress often does not vote on Fridays or Mondays, so those days are generally good for visits.



3. Invite your representative for a visit

Due to the demands on members of Congress, their schedules fill up quickly. Your invitation letter should be sent several weeks in advance of your preferred date for their visit. The letter should be personalized with specific information about your facility, and should include a window of time during which you would like them to visit (i.e. the August recess period). The letter should be printed on your facility letterhead and signed by the CEO, university president or equivalent. The letter should then be emailed to the member’s scheduler. A sample letter has been included in the appendix of this toolkit.



4. Follow up with the representative’s scheduler

Contact the member’s scheduler within 24 hours of sending the invitation to make sure it was received. He or she will work with you to set a date. If the member’s schedule is too tight this



recess period, suggest another time or offer to visit the member and/or his or her staff at the district office at their convenience. The scheduler will be able to arrange that meeting or will pass you to the district office to set up a time.

5. Contact the Podesta Group with date



Once you have received a confirmation date for the visit, you should contact Emily Pappas and Josh Holly of the Podesta Group to make them aware of the date, and to assist you with planning and logistics. Their contact information is provided in this toolkit appendix.

6. Coordinate with the member's communications staff



It is up to the member whether or not the press should be involved. If media coverage is agreeable with the elected official, you will want to produce a suite of media materials well in advance of the visit as it can often take days for a member's office to approve materials. Be sure to draft a media advisory, press release, photo release and op-ed for the member's office's review.

- **Media Advisory:** A brief written notice to media about an upcoming event or announcement. The advisory will concisely list the date, time, location, purpose of the event or announcement, participants and contact information. Advisories are typically a page or less in length, and should be circulated to the press, including the photo editor of the local newspaper, within five business days of the event or announcement.
- **Press Release:** A written communication announcing news that is sent to media. Usually contains a point of contact for further media inquiries or requests, and quotes from those associated with the news. In this case, it would be appropriate to draft a quote for the member of Congress and your facility's CEO, president or equivalent. The release should be put on facility letterhead and be approved by the member's office prior to distribution. The release should be circulated to the media via a national wire service, such as PR Newswire or BusinessWire, and/or sent to local press contacts as soon as the visit begins.
- **Photo Release:** Similar to a press release, a picture from the event or announcement that is released to the press for publication. Should include a photo credit and brief caption that identifies people in the photo. In this case, the photo should include the member of the Congress meeting with facility leadership and/or employees, and must be approved by the member's office prior to distribution. It is recommended that a professional photographer be on hand to snap photos of the member and the facility CEO and/or employees during the tour. The photo should be circulated to the media via a national wire service, such as PR Newswire or BusinessWire, and/or sent to photo editors at target publications as soon as the visit concludes.



- Op-ed: Abbreviated from “opposite the editorial page,” a written piece that expresses an opinion and is signed by someone who is unaffiliated with the newspaper’s editorial board. Op-eds are typically 450-650 words, depending on the publication’s guidelines. Publication of an op-ed is determined by the editor. Ideally, the op-ed would be written from the perspective of the member of Congress and would be tied to their visit at your facility. If the member agrees to an op-ed, you would take the lead on drafting the piece and placing it, but the member’s office must review and approve the piece prior to submission. Should the member chose not to sign onto an op-ed, the piece could be written for your facility’s CEO, president or the equivalent, and discuss the upcoming/recent visit with the member.

A sample advisory, press release and op-ed can be found in the appendix of this toolkit. In addition to these media tactics, the member’s visit should be featured on your facility’s website along with a brief write up and photo.

7. Create a fact sheet and relevant materials

A fact sheet is a great document to share with the member’s office in advance of their visit so that they are familiar with your company, university, etc. Your facility fact sheet should include: current employment numbers, your economic footprint on state/district, interesting facts about your facility, and positive testimonials of current



employees, community leaders, faculty, etc. The fact sheet should also be given to the member along with the NPI one-pager, found in the appendix of this toolkit, as “take away” materials from the visit. Other take away materials and gifts can also be presented to the member at the conclusion of their visit. Be aware that Congress has a \$50 limit on gifts to members and staff.

8. Confirm with the representative’s scheduler

It is best to contact the scheduler one to two weeks in advance of the visit to confirm the meeting, and confirm who will be attending the visit with the member - make sure you have that person’s contact information. Items you should provide the member’s office for this conversation includes:

- ✓ Schedule of events for the visit (sample included in the appendix)
- ✓ List of facility visit participants and their roles
- ✓ Map/directions/parking instructions for the member and congressional staff
- ✓ Facility contact name and number(s) for event
- ✓ Marketing materials including your facility fact sheet and the NPI one-pager
- ✓ Media confirmed to attend the tour (if available)
- ✓ Confirm whether or not the staff would like to do a walk-through of the facility 24 hours in advance of the member’s arrival and if so, present a schedule and confirm logistics for the walk-through

9. Notify your staff and employees about the visit

Employees, faculty and staff should be informed of the congressional visit and your expectations. The more prepared



everyone is, the better the visit. E-mail your facility a week in advance of the visit to convey your expectations and send a reminder e-mail the day of the visit.

10. Perform walk-through with facility leadership one day ahead of the visit



The route should be mapped out so that the event and tour run smoothly and on time. A walk-through the day prior to the event is recommended to ensure that all participants understand their roles, know the purpose of the visit, are aware of the route that will be taken in and around the building and know how much time they will be allotted for their portion of the presentation. This is also a good time to review messaging. Remember, most members have little working knowledge of photonics; it is important to speak at their level. Present leadership with a schedule and a key messages document.

11. Issue the media advisory and finalize other press materials



Within five business days of the visit, issue the media advisory to the press, including the photo editor of the local newspaper. Follow up with a phone call and a reminder e-mail the day of the event. Also work with the member's communications team to finalize the press release and op-ed. Once the op-ed is approved, begin working on placement in your local newspaper.

DURING THE VISIT

*Task
Completed*

1. Greet the member and his/her staff (2-3 min.)



It is often good to have a “Welcome Representative/Senator X” banner or a sign in an area with high visibility for the member to see as soon as they arrive. Your facility’s CEO, president or the equivalent should be on hand to greet the member and his/her staff when they arrive on site. Preferably, one or two employees or representatives from your facility should also be on hand to accompany the group on the tour. You may want to consider including a local business leader who understands how vital your facility is to the local community and state. Following brief introductions, the tour should promptly begin.

2. Tour your facility (20 min.)

Your facility’s CEO, president or the equivalent should lead the tour. This is the best time to show your facility “in action” to the member and his/her staff. If the member is touring a university campus, it is good to visit a classroom or laboratory where faculty and students can demonstrate active learning. If visiting a manufacturing facility, give the member a hard hat and pair of safety goggles so they can see the technology up close. Often, the tour makes for the best visit visuals; have a camera ready to capture the best moments.



3. Meet with employees, faculty, students and/or staff (30 min.)

At the end of the tour, you should allow the member to have open interaction with employees, faculty, students and/or staff. This will allow him/her to offer remarks and answer questions. This is often done in a lunch or reception setting.

4. Closing remarks and thank you (2-3 min.)

Close out the visit by thanking the member and his/her staff for visiting the facility. If you wish to present the member and their staff with a small (under \$50) token of your gratitude, this would be the time for that presentation. Make sure also to supply the member and staffer with your take away materials.

5. Issue the press release and/or photo release

Circulate the release(s) to the media via a national wire service, such as PR Newswire or BusinessWire, and/or send to local press contacts.

AFTER THE VISIT

*Task
Completed*

1. Send a thank you letter to the member

A thank you from your CEO, president or equivalent should be sent shortly after the member's visit. To ensure delivery, it is best for this letter to be sent via email to the staffer who attended the visit with the member. A sample thank you letter can be found in the appendix of this toolkit.



2. Report back to the Podesta Group

After the tour is complete, contact the Podesta Group to let them know how the tour went and any additional requests made by the member and his or her staff.



3. Monitor for media coverage of the visit

If/when the op-ed is placed and/or positive articles about the tour are published, make sure to pass them along to the member's communications staff and the Podesta Group. It is good to offer the communications staff sample Facebook posts and Tweets about the media placements to encourage them to help spread the word.



FACILITY TOUR: DOS

- Do → Plan well in advance**
Elected officials have numerous constraints on their time. Your chances of successfully recruiting a representative to visit your facility require that you invite him/her well in advance.
- Do → Be flexible with your dates and times**
Recess periods are often long and some dates and times may work better than others. Accommodating the elected official can mean a lot in the long run.
- Do → Coordinate closely with the Podesta Group**
The Podesta Group has extensive experience conducting site visits. Using them as a resource can make the difference in pulling off a great event.
- Do → Invite the relevant policy staffer to accompany the member**
While the elected official is the boss, his or her staff can be key advocates of your cause and are often in charge of the “day to day” dealings with the office. As an example, if your focus is health care, invite the health policy staffer.
- Do → Distribute schedules to everyone who will be involved in the tour**
It is important that the tour run as smoothly as possible and that everyone involved knows his/her role. Once the schedule has been finalized, create a schedule to distribute to all participants. Send a copy to the member’s scheduler.
- Do → Involve your employees, students, faculty, staff and/or local leaders**
Representatives will want to interact with staff as a way to better understand how your facility is adding value to the local community and economy. Invite local leaders who understand your footprint on the community and state to be on hand to reinforce this message.
- Do → Take the member wherever they request**
While you may have planned your tour, oblige the member if they request to go into “uncharted” territory. Sometimes representatives will request to walk into an office or talk to employees in passing; these are positive encounters. However, this also shows the need to make your facility aware that a member of Congress will be visiting, and they should be prepared to answer any questions.
- Do → Let the member dictate the timing**
While it is important to spend as much time with the member during his/her visit, schedules are tight and they may need to leave early. However, if the member is engrossed and has an open schedule, let the visit run over by keeping the conversation going and the member engaged. A well-orchestrated hour tour should be the goal.
- Do → Invite the member for a return visit**
Near the end of the tour, thank the member for coming and offer the facility as a resource in the future.

FACILITY TOUR: DON'TS

Don't →

Be discouraged

Members are unable to fill all the requests that are sent to them. Try again for the next available time they will be in their district or state, or offer to visit their district office for a quick meeting with the member and /or their district staff at their convenience.

Don't →

Allow alcohol or other questionable behavior during the visit

It is important to put your best foot forward while the member is visiting. Do a quick check of the areas where the member will be visiting to ensure that everything is safe and in good shape for the visit.

Don't →

Assume the members knows about photonics

Remember, most members have little working knowledge of photonics; it is important to speak at their level. Use this time to educate them about photonics and the importance of the National Photonics Initiative. Reference the internal messaging document in the appendix of this toolkit for guidance on how to talk about photonics and the NPI with members of Congress.

Don't →

Get bogged down in lengthy policy debates

When a member visits your facility, it is an opportunity for you to showcase your company/university, your staff and the impact of photonics. Getting into heated political or policy debates takes away from the purpose of the visit. Conversations should revolve around the positive things your facility is doing both in terms of

CONTACT INFORMATION

The Optical Society (OSA)

Laura Kolton

202.416.1499

lkolton@osa.org

SPIE, the International Society of Optics and Photonics

Krisinda Plenkovich

360.685.5518

krisindap@spie.org

Podesta Group

Emily Pappas - Media Relations

202.448.5208

epappas@podesta.com

Josh Holly - Government Relations

202.879.9358

jholly@podesta.com

SAMPLE INVITATION LETTER

(insert letterhead)

(date), 2013

The Honorable (insert first, last name)
(insert address)
Washington, DC (insert zip)

Dear Representative/Senator (insert last name):

On behalf of the (insert facility name), I am writing to invite you to meet our staff and tour our facilities during the upcoming congressional district work period in August.

As you look around your office, you may see a phone, computer, TV – all are modern-day technologies made possible largely by photonics. Optics and photonics are the science and application of light. Specifically, photonics detects, generates and harnesses light to form the backbone of the Internet, guide energy exploration, and keep our servicemen and women safe with night vision, GPS, and physiological feedback on the battlefield. Without photonics, the world as we know it would not be possible.

Photonics is vital to our company (if a school or other facility, indicate), community and country. (insert paragraph about facility – include job numbers, economic footprint on the district/state/country, and explain your connection to photonics).

Historically, the United States has been the world leader in deploying photonics research to power cutting-edge technologies, but global competition has put our leadership position at risk, causing a substantial loss of global market share to overseas competitors as well as thousands of US jobs.

Through the National Photonics Initiative (NPI), (insert facility name) is working to raise awareness about photonics and unite industry, academia and government experts to identify and advance areas of photonics critical to maintaining US competitiveness and national security: advanced manufacturing, communication and information technology, defense and national security, energy, and health and medicine. US investment in these photonics-driven fields will create jobs and grow our economy, protect and improve the lives of our people, and position the United States as a global technology leader.

I hope you will be able to visit (insert facility name) to see first-hand the impact of photonics on your congressional district. We will be in touch with your scheduling staff shortly to confirm your availability. Thank you for your consideration of this request.

Sincerely,

(name)
(title – CEO/President)
(facility name)

Cc: (scheduler name)

SAMPLE MEDIA ADVISORY

Email subject line: Congresswoman Jane Doe to Tour [insert facility name] – Aug. 13 @ 1:30

MEDIA ADVISORY

WHAT: Congresswoman Jane Doe (D-CA) will visit San Jose company [insert facility name] next Tuesday, August 13 at 1:30pm PST. The hour visit will include a tour of the company and a reception with employees and community leaders, and will conclude with remarks from Congresswoman Doe and [insert facility name] CEO John Smith [insert CEO, president or equivalent name and title]. Media and photographers are welcome to attend.

[insert paragraph about facility – what you do, job numbers, economic footprint on the district/state/country, and explain your connection to photonics].

Through the National Photonics Initiative (NPI), [insert facility name] is working to raise awareness about photonics and unite industry, academia and government experts to identify and advance areas of photonics critical to maintaining US competitiveness and national security. Congresswoman Doe's visit to [insert facility name] will serve as an opportunity to showcase to the congresswoman the critical role that photonics plays in creating jobs and growing our local and national economy, protecting and improving the lives of our people, and positioning the United States as a global technology leader.

WHEN: [insert date, time, location including address]

WHO: Congresswoman Jane Doe (D-CA)

CEO John Smith [insert CEO, president or equivalent name and title]

[insert anyone else, name and title, of interest to the media]

CONTACT: [insert press contact]

SAMPLE CONGRESSIONAL VISIT SCHEDULE

**Schedule for Representative Jane Doe (D-CA)
Tour of X Facility
Address
San Jose, California**

Tuesday, August 13, 2013

- 1:29 p.m.** Rep. Doe and staff arrive at Facility X; park in parking lot/garage (provide instructions if needed)
- 1:30 – 1:35 p.m.** Rep. Doe greeted outside facility by CEO Smith; snap a couple of quick hand shake pictures
- 1:35 – 1:40 p.m.** Proceed indoors to X location; discussion with relevant staff member
- 1:40 – 1:45 p.m.** Proceed to X location; discussion with relevant staff member
- 1:45 – 1:50 p.m.** Proceed to X location; discussion with relevant staff member
- 1:50 – 1:55 p.m.** Proceed to X location; discussion with relevant staff member
- 1:55 – 2:00 p.m.** Proceed to X location; discussion with relevant staff member
- 2:00– 2:20 p.m.** Proceed to conference room X for a light reception to meet with employees/staff/faculty to discuss the facility demographics, economic footprint, impact of photonics, etc.
- 2:22 – 2:24 p.m.** CEO Smith introduces Rep. Doe and offers a thank you for her time
- 2:24 – 2:29 p.m.** Rep. Doe offer remarks and reflects on the visit to the facility
- 2:29 – 2:30 p.m.** Proceed to front of facility; present gift bags and snap any last minute pictures; Rep. Doe departs

Facility Contact: Name/number/e-mail

Member Contact: Name/number/e-mail

SAMPLE PRESS RELEASE

FOR IMMEDIATE RELEASE

<Insert Date>

Contact: <Name>

<Phone>

<Email>

Representative Jane Doe Visits X

Congresswoman Sees First-Hand the Benefits of Photonics on Local, National Economy

(San Jose, CA) – Today, Representative Jane Doe (D-CA) toured [insert facility name], [insert facility tagline], to see first-hand the impact of photonics on [insert city name], the state and the nation. During the site visit, she met with employees and local business leaders to discuss the benefits of photonics and the role that [insert facility name] is playing in solving the challenges of a modern world by harnessing the power of light.

“It was a privilege to host Representative Doe at [insert company name] today,” stated [insert name and title of CEO/president or equivalent]. “We appreciate all the work she has done on behalf of our business and our district. It was a wonderful opportunity for us to showcase the integral role that photonics play in making our everyday lives possible.”

[insert facility name] is committed to utilizing photonics to better [insert applications – health care, energy, advanced manufacturing, etc.]. Photonics detects, generates and harnesses light to form the backbone of the Internet, guide energy exploration, and keep our servicemen and women safe with night vision, GPS, and physiological feedback on the battlefield.

[insert paragraph about facility – what you do, job numbers, economic footprint on the district/state/country, and explain your connection to photonics].

“Many people take for granted the modern-day technologies made possible largely by photonics,” said Congresswoman Doe. “From computers, to smart phones, photonics are all around us. It was rewarding to see first-hand the ways in which [insert facility name] and its talented workforce are using photonics to improve the way we live and work – it’s a win for them and a win for the nation.”

Historically, the United States has been the world leader in deploying photonics research to power cutting-edge technologies, but global competition has put our leadership position at risk, causing a substantial loss of global market share to overseas competitors as well as thousands of US jobs.

Through the National Photonics Initiative (NPI), [insert facility name] is working to raise awareness about photonics and unite industry, academia and government experts to identify and advance areas of photonics critical to maintaining US competitiveness and national security: advanced manufacturing, communication and information technology, defense and national security, energy, and health and medicine. US investment in these photonics-driven fields will

create jobs and grow our economy, protect and improve the lives of our people, and position the United States as a global technology leader.

“Educating the public about photonics is key to the future of our company and country,” added [insert CEO/president or equivalent last name]. “It was a pleasure to host Congresswoman Doe and we welcome the opportunity to showcase our work and technology to others both locally and in Washington, DC.”

ABOUT FACILITY X: [insert facility boilerplate including website]

ABOUT THE NPI: The National Photonics Initiative (NPI) is a collaborative alliance among industry, academia and government seeking to raise awareness of photonics and the impact of photonics on our everyday lives; increase cooperation and coordination among US industry, government and academia to advance photonics-driven fields; and drive US funding and investment in areas of photonics critical to maintaining US economic competitiveness and national security. The initiative is being led by a coalition of scientific societies, including the American Physical Society (APS), the IEEE Photonics Society, the Laser Institute of America (LIA), the Optical Society (OSA) and SPIE, the International Society of Optics and Photonics. For more information, visit www.LightOurFuture.org.

SAMPLE THANK YOU LETTER

(insert letterhead)

DATE

The Honorable (insert name)

Address

City, State, Zip

Dear Representative/Senator (insert last name):

On behalf of (insert facility name), I would like to thank you for taking valuable time from your schedule to visit our (insert company/campus/etc.).

It was an honor and pleasure to meet with you and your staff, and I hope you enjoyed the tour. More importantly, I hope you came away with a greater understanding of photonics, and the integral role that photonics plays in US economic competitiveness and national security.

Though (insert facility name)'s involvement in the National Photonics Initiative (NPI), we look to increase cooperation and coordination among US industry, government and academia to advance photonics-driven fields that will create jobs and grow our economy, protect and improve the lives of our people, and position the United States as a global technology leader; I hope we can count on your support in achieving this mission.

Please use us as a resource as you tackle issues related to our industry. We look forward to working with you and your staff in the coming months.

Warm Regards,

(name)
(title – CEO/President)
(facility name)

Cc: (names of staff that attended with the member)

SAMPLE OP-ED

Words: [stay under 650]

Let's Be Laser Focused on Photonics for the Future

By Rep. Jane Doe (D-CA)

How many times you have heard a public official promise to be “laser focused on creating jobs?”

The next time you hear that, ask him or her to “focus like a laser on lasers,” and other advances in the field of photonics that support American jobs.

Photonics is the science and application of light. Whether you're using the computer, watching television, driving a car or texting on your smartphone, photonics makes modern-day conveniences possible. Photonics also forms the backbone of the Internet, guides energy exploration, and keeps our servicemen and women safe on the battlefield.

I recently had the opportunity to visit [insert facility name] in [city] to see first-hand how photonics are improving our everyday lives. [insert a paragraph about what your facility is doing in relation to photonics].

While great accomplishments have been made in discovering, developing and commercializing advances in photonics, the United States has not kept pace with our competitors in investing in this fast-growing field. Consequently, we have lost our competitive edge, as well as many companies and jobs to our competitors overseas.

We know what we must do – and why it is so important. In 1998, the National Research Council released a report, “Harnessing Light,” presenting the potential advantages of optics and photonics on major sectors of the economy. Unfortunately, the US did not seize these opportunities, while our competitors did. In 2011, Germany committed nearly €1 billion (\$1.3 billion in USD) to photonics R&D over 10 years; China began funding several programs targeting photonics supply chains; and, the European Commission, as part of its new Horizon 2020 program, has directed €1.6 billion (over \$2 billion in USD) to photonics-related R&D over the next seven years.

In 2012, the National Research Council released an update to its earlier report and called for a National Photonics Initiative (NPI) to raise awareness about photonics and the impact of photonics on our everyday lives; increase collaboration and coordination among US industry, government and academia to advance photonics-driven fields; and, drive US funding and investment in areas of photonics critical to maintaining US competitiveness and national security. Heeding that call, the recently NPI launched along with release of a white paper detailing recommendations from more than 100 experts from industry, academia and government collaborated to guide funding and investment in five photonics-division fields:

advanced manufacturing, communications and information technology, defense and national security, energy and health and medicine.

In national security, photonics makes laser-guided weapons more accurate and provides lasers for missile defense. In energy, photonics provides renewable power sources, as well as optical systems to monitor wells in the oil and gas sector. In health and medicine, photonics is responsible for advances from laser eye surgery to CT scans. In communications and information technology, optics and photonics can continue the advances that have increased the capacity of the Internet by nearly 10,000-fold over the past two decades. And, in advanced manufacturing, substantial job growth is possible in new and innovative areas of manufacturing that make use of high-power and low-cost lasers as well as 3D printing.

The US needs to drive funding and investment in all five of these sectors, while encouraging greater cooperation between industry and academia. In order to prepare technically skilled workers to fill photonics-based positions, we need to increase investment in education and training. Furthermore, we must expand federal investments supporting collaborative research by universities and companies to develop new manufacturing methods that incorporate photonics.

Photonics offers great opportunities for world-class companies and middle-class jobs. Let's stay laser focused on making photonics a nation priority.

