

## **Effectively Organizing a Strategic Partner's Visit**

These suggestions are designed to maximize the effectiveness of a strategic partner's visit to a regional Gamaliel Network affiliate.

### **A. What the host owes the strategic partner.**

1. First, review your plan for utilizing a partner with the Metro Equity Office and secure its approval.
2. Ascertain the partner's availability as far in advance as possible. Discuss your goals for the visit and make sure that the partner believes that he can make a significant contribution towards advancing your goals. Confirm all arrangements regarding dates, fees, cost reimbursement, etc. in a letter.
3. Though the partner is generally invited to keynote a major event, the partner is often available for other meetings with key contacts (e.g. state and local officials, potential funders, editorial boards, etc.). However, don't overschedule the partner or arrange too tight a schedule. Allow reasonable time to move from one event to another, including rest time before the main event. Provide the partner with the confirmed schedule as early as possible.
4. Provide the partner with an advance briefing (in writing, if possible) on current issues, political trends, key personalities, etc. and how they affect the visit's goals. If more than one partner is involved, the host should set up a conference call to discuss roles.
5. Provide the partner with advance attendance lists, particularly for the main event, if possible. (Identify by organization and jurisdiction.) The partner needs to know who the audience is and how best to shape his material for effective communication.
6. Assist the partner with preparatory research, as needed. A host can help refine the partner's information. Provide relevant studies and reports. Send or email relevant news articles.
7. When the partner arrives, provide, if possible, volunteers for transportation. This assures that a) the partner reaches scheduled events on-time, b) the partner can build relationships with your volunteers, and c) the partner can pick up local information.
8. If this is a partner's first visit to your community, arrange a tour of the area as the first order of business. It helps the partner to be able to insert local color into his presentations.

9. If the partner is arriving the prior evening, schedule a briefing/get acquainted dinner with a small group of leaders.
10. Make careful logistical arrangements for all presentations. (**This is the most common shortcoming affecting partners' visits.**) If a partner intends to use AV equipment, meeting places should be selected that lend themselves to AV presentations. Make sure that the AV equipment is pre-tested and rooms are properly set up.
11. Also, adhere to Rusk Rule #29: "Always hire a hall that is half the size of the smallest crowd you possibly expect, so that if the turnout is even less, you still have the appearance of a packed house." (In fact, it always impresses an audience if the hosts have to start bringing in additional chairs at the event's outset.)
12. If you want to make the partner's books or other materials available for your participants at the event, make arrangements well in advance.
13. At the post-event/visit evaluation, be candid and frank about the partner's performance. Criticism helps us improve.
14. Provide the partner with copies of post-event news coverage, etc.
15. Make sure that the partner is provided with specific information about to whom to send any invoices. Please pay all invoices promptly. (**This is the second most common shortcoming affecting partners' visits.**)
16. Keep the partner advised of local developments after the visit. We're vitally interested.

#### B. What the strategic partner owes the host.

1. Be fully prepared for all events. Read all advance materials.
2. Review key leaders' names and positions in advance.
3. Think hard about how best to present the material to each audience. Provide advance copies of overhead packets, etc. for reproduction and distribution.
4. Stick to the time allotted for a partner's presentation. Events are organized with precise time frames.
5. Provide the host with follow-up materials (write-up remarks, draft op-eds, letters to key new allies, etc.)
6. Be available to the host to provide other materials and continuing advice from our home base by phone, email, and mail.
7. In short, do our absolute best to advance the host's reform agenda.