

“A Day in the Field”

Tips on how to schedule and host a tour of Partner Projects



INTRODUCTION

The San Francisco Bay Joint Venture has been taking elected officials, funders, land managers and other partners on “decision maker” tours for the past decade. We offer these field trips two – four times a year to show off the work of our partners, establish memorable personal relationships, share our key messages and promotional materials and garner ongoing support for our work.

These tours have played a significant role in our collaborative and supportive Bay Area delegation. Field staff, who serve as the informants and advisors to politicians, can turn over quickly. By having frequent on location events, we insure that we are maintaining our connection to elected officials and honor the work being done by our partners. For those who join us on, tours offer a break from the routine and a welcome day in the field to see projects firsthand and places many partners have only heard about, but never seen.

What follows is a timeline of considerations and steps involved in hosting a tour, a sample itinerary and some photos from some 2011 tour moments.



2 MONTHS PRIOR

LOGISTICS

- Determine purpose of and audience for tour.
- Identify tour locations/route. *
 - If you have the capability, it is nice to generate a map of the area that will be covered with project names/stops and driving route.
- Identify project leads ** and vet the date, including a rain date.
- Identify and create guest list: consider including agencies, funders, board members, and partners in addition to electeds and their staff, etc. We usually invite 70-100 per tour and expect 24-30 to show.
 - If there are VIPs – key people that it would not be worth hosting a tour without their presence – vet the date with them first.
 - For elected officials you will need to call the office and ask for the name and contact information of the current scheduler or field/environment staff OR email invites will likely get lost!
 - If not sure who to include on your invite list, google senators (state and federal), congressionals and assembly members to find district maps that will show where they touch into your project area.

CONSIDERATIONS

* HALF DAY or ALL DAY?

- An entire day in the field is a luxury for most. While staff of congressionals, senators and state assembly members are often dedicated to attending events, those at the regional level (i.e. board of supervisors, city council and other partners) may not be able to take a full day. As tempting as it is to pack as much in as possible, it is highly recommended to consider a half day tour (9am-1am, or have a full day tour start at 10am and end at 3:30pm).

** INCLUSIVITY

- When it comes to project leads, it is best not to assume you know who should speak on behalf of a project, and a good practice to ask those closest to the site (your contact, as the case may be) and take it from there.
- Important to make sure electeds know staff are welcome in lieu of actual elected official.



4-6 WEEKS PRIOR

LOGISTICS

- Send save the date by email or evite*.
- Follow up the email invitation with a call to insure receipt within the week.
- Set up tour planning conference call with all project leads for week (or two) prior to tour.
 - Agenda may include, intros, key messages, timing, mission of JV, purpose of tour, review of confirmed guests, some tips **.
- Secure funds for food and transportation – often NGO partner support will be needed.
- Reserve shuttle transportation***.
- Arrange meeting room for start and end location.
- Consider having/ordering promotional giveaways – we’ve used SFBJV water bottles, caps, lens wipes...
- Order food – arrival snacks (sometimes Peets/Starbucks will donate) and lunch if an all day tour.

CONSIDERATIONS

* EVITE or EMAIL invite?

- We used to send printed invitations on letterhead until the anthrax scare meant mail ended up in some holding pattern for weeks before being received. It was expensive and time consuming too! Then we started attaching a formal invitation in an email, but have since been assured that the best way to send an invitation for the majority of people is in the email body with a clear SAVE the DATE (actual date) subject heading. Evite can end up in the spam box so it is good to send a back up email invite a few days if you go the evite route. A few offices still only receive fax invitations, so you might want to ask about that when you call for contact info.

** TIPS FOR PROJECT LEADS

- Keep presentations to 20 minutes or less with time for questions.
- Mount maps or presentation materials to foam board or something stiff.
- Include three- five main talking points, including funding needs (make an ask).

** SHUTTLES

- Transporting guests from site to site is a great way to get some one on one with those attending and share more information along the way. We have used an airline coach service with 24 and 28-seat shuttles that price, as of fall 2011, at slightly over \$100/hour. Guests leave their cars at the starting location and are returned to them at the end of the day. Some will follow if they can’t attend the entire tour.



2-3 WEEKS PRIOR

LOGISTICS

- Send reminder email to those who have not yet responded and confirmation emails to those who are coming as a reminder it is still on!

WEEK BEFORE

LOGISTICS

- Create itinerary with confirmed guests; include your cell phone number on it! – see sample page ?
- Host planning call with project leads to go over logistics, tour details, summary of their presentations, and answer questions.
- Confirm shuttle and food order. We always order a lunch for shuttle driver and project lead that is at or nearest to lunch location. Mostly we get box lunches and have taken lunch orders from confirmed guests, guessed at the break out of veggie, meat, etc. and on occasion eat at a restaurant.
- Keep an eye on the weather.
- Send final email with itinerary. I like to generate a second excel file with only confirmed guests, their title, email and phone number – pulled from the invite list.
- NAMETAGS.
- PACKET – we use JV signature folders for these and include:
 - Route map – nice to generate.
 - Brochure/executive summary.
 - Tour Itinerary.
 - Hand outs from other projects (can offer to do them for project leads or have them send you them to stuff ahead of time OR have them hand out and guests can add them on site which is I think the best way to do it – so the packet isn't overwhelming up front.
 - Business card.
 - National and/or your JV fact sheet.
 - Anything else you want to get out there.



DAY OF TOUR

LOGISTICS

- Bring numbers for all tour leads.
- ENJOY the people, the projects and the fruits of your labor!

POST TOUR

LOGISTICS

- THANK everyone for coming with a summary of take home messages.
- Save a sample packet – for files.
- Send information from packet to anyone who did not show





SAMPLE TOUR ITINERARY

Urban Wetland Restoration Projects Tour

Friday, May 4th, 2011

Crissy Field Center - 1199 East Beach, Presidio, San Francisco

<u>TIME</u>	<u>ACTIVITY/LOCATION</u>	<u>PARTNER/AFFILIATION</u>
9:00	Gather at Crissy Field	
9:15	Welcome/overview	Diane Ross Leech, Chair – SFBJV Beth Huning - SFBJV, Coordinator Doug Overman, Parks Conservancy
9:30	Depart on field trip	
9:45 - 10:30	Crissy Field	Sharon Farrell, Parks Conservancy Kristen Ward, National Parks Service
10:30 - 11:40	Drive to Yosemite Slough	
11:40 - 12:25	Yosemite Slough	Cecille Caterson, Elizabeth Goldstein and Davida Hartman, CA State Parks Foundation
12:25 - 12:40	Drive to Literacy for Environmental Justice (LEJ)	
12:40 - 2:00	LUNCH & Heron's Head	Raynelle Rino, LEJ
2:00 - 2:35	Drive to MLK/Arrowhead Marsh	
2:40 - 3:15	MLK/Arrowhead Marsh	Ralph Trujillo, East Bay Regional Park District
3:15 - 3:30	Drive to Lake Merritt	
3:30 - 4:00	Lake Merritt	Rebecca Tuden and Joel Peter, City of Oakland
4:00 - 4:30	Return to Presidio Trust	

Special thanks to the *Golden Gate Parks Conservancy* for providing morning snacks,
and the *State Coastal Conservancy* for sponsoring van transportation.



SAMPLE GUEST LIST

CONFIRMED GUESTS

ELECTED REPRESENTATIVES

GINA BANKS	on behalf of SENATOR DIANNE FEINSTEIN
NICOLE RIVERA	on behalf of CONGRESSWOMAN NANCY PELOSI
COLIN FOARD	on behalf of CONGRESSWOMAN BARBARA LEE
ASHLEY SUMMERS and	
BOB TWOMEY	on behalf of ASSEMBLYMEMBER FIONA MA
JAEL MYRICK	on behalf of ASSEMBLYMEMBER NANCY SKINNER

SAN FRANCISCO BAY RESTORATION AUTHORITY (SFBRA) and ADVISORY BOARD

SAM SCHUCHAT	State Coastal Conservancy
JOHN GIOIA	CCC Board of Supervisors
JUDY KELLY	San Francisco Estuary Partnership
JOSH ARCE	Brightline Defense Project
GRANT DAVIS	Sonoma County Water Agency
JERRY KENT	Former General Manager, East Bay Regional Park District
CYNTHIA MURRAY	North Bay Leadership Council
JOHN RIZZO	Sierra Club
PATRICK RUTTEN	NOAA Restoration Center
KATE WHITE	Urban Land Institute
ROBERT SPENCER	Urban Economics
JOHN BOWERS	Bay Conservation and Development Commission
MENDEL STEWART	San Francisco Bay National Wildlife Refuge Complex

OTHER PARTNERS

KRISTAL DAVIS FADTKE	Sacramento-San Joaquin Delta Conservancy
CLAIRE THORP	National Fish and Wildlife Foundation
JOHN DONNELLY	Wildlife Conservation Board
AMY HUTZEL	State Coastal Conservancy
BRUCE WOLFE	San Francisco Bay Regional Water Quality Control Board
ARTHUR FEINSTEIN	Citizens Committee to Complete the Refuge
STEPHEN KNIGHT	Save the Bay
DIANE ROSS-LEECH	SF Bay Joint Venture Management Board Chair, and PG&E



Images from 2011 Tour Moments

Contact

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