

## Five Steps to Policymaker Education

As stewards of your Safe Schools/Healthy Students (SS/HS) grant, it is critically important to share the impact of this initiative with Federal, State, and local policymakers. Policymakers are uniquely able to take your good work to scale in your region, in your State, or across the country—helping to not only sustain but spread the accomplishments and lessons learned through SS/HS initiatives.

By engaging policymakers, you can help them learn more about important SS/HS issues—youth violence prevention, bullying, substance abuse prevention, and mental health—and how these issues connect to their constituents. Policymaker outreach allows you to demonstrate the positive impact of SS/HS in your community and gives your legislators a blueprint for replicating the success of SS/HS in other communities.

By sharing the positive outcomes of your SS/HS initiative you also help to establish yourself as a valuable resource for policymakers. Public officials must consider a vast number of issues and need to rely on a multitude of resources to keep them knowledgeable, including experts like you. Educating policymakers can involve giving the background and history of your initiative, sharing data and statistics, telling program success stories, and inviting policymakers to see your programs in action.

It is important to note that policymaker education is not the same as lobbying. Your goal is to communicate the benefits of SS/HS to your policymaker(s)—not ask for funding or try to influence any piece of legislation in any way. Just as you engage new community partners by educating them about the SS/HS initiative and the benefits it brings to your community, your policymaker outreach should inform and educate your audience.

The following steps to policymaker education offer some strategic direction to help you educate decisionmakers, policymakers, and State elected officials about the success of your SS/HS initiative.

### Step 1: Research and Learn

As always, with any audience, learn as much as you can about your policymakers before reaching out to them. It's important to remember that although they are public figures they are also concerned citizens.

Many policymakers at your local, State, and Federal levels of government will be interested in hearing about the success of your SS/HS initiative. A good first step is to identify the key policymakers in office.

Make a list of the officials whom you want to engage and conduct research on them to find out their specific interests and their record on issues related to the SS/HS elements. Visit your policymakers' Web sites and read their biographies, statements, press releases, and position papers to understand the issues about which they are concerned. Watch the videos of speeches they have posted on their Web sites. Think about their specific interests and passions and see how SS/HS and your success align with their priorities.

Ask members of your partnership, colleagues, family, and friends if they know any of the policymakers you want to engage. They may offer additional insights to help you better position your outreach efforts. Don't forget to connect with other current or former SS/HS grant sites in your State. They may have useful information about the officials you want to reach and you may want to consider collaborating with other SS/HS project directors to educate policymakers.

## Step 2: Request a Meeting

One of the key ways to engage policymakers is through visits to their offices. Personal visits go a long way toward establishing credibility. Just as you would meet with a community partner, a face-to-face meeting is often the best way to begin building a bridge toward a trusted relationship.

Policymakers' Web sites provide several ways to get in touch. You can call, email, send a letter, or fax a meeting request—depending on the office's preference. Many offices have a scheduler on staff, and you can speak directly with that person to make an appointment. The local offices for senators and representatives in Congress are fairly small, so don't be afraid to pick up the phone and give them a call. When you call, mention your title and a little bit about your initiative and politely ask when you can schedule a time to come in and speak more with the elected official, or someone on staff, about your work.

Some offices may ask for a formal letter requesting a meeting. Be sure to follow their instructions for submitting a meeting request.

You can meet with policymakers at their local, State, or Washington, DC, offices. If they are unavailable, arrange to meet with any staffers or legislative assistants whose focus is on education, mental health, and/or family or children's issues. Staffers are important resources; they act as "eyes and ears" for elected officials, filling them in on the important issues they've learned about and meetings they've had each day. If you are able to travel to Washington, DC, plan to meet with several legislative assistants at the same time.

## Step 3: Prepare Messages and Materials

Before you meet with your policymakers, you will need to prepare several items to ensure a successful visit. One of the first things you will need is a brief, easy-to-understand message on the role of your SS/HS initiative and its contribution to the well-being of your community. Elected officials are constantly meeting with constituents and have a real interest in what you have to say. However, given the competing demands on their time, you must be prepared to get your message across in a brief and compelling way if you wish to make a lasting impression.

Your message should be clear and concise and highlight the successes of your SS/HS initiative. Begin with those programs, services, or issues that align with the policymaker's priorities (e.g., crime reduction, substance abuse, improved academic outcomes, graduation rates, or bullying reduction). In the current economic climate, policymakers also are happy to hear about increased efficiencies that lead to decreased costs. Don't forget to include key data points that support your message and be sure to practice delivering any key messages and talking points prior to your meeting.

Policymakers often are happy to receive materials about your organization. Prepare a factsheet about your SS/HS initiative as a leave behind piece. A factsheet is an important part of your educational outreach. It provides policymakers and their staffers with a way to refer back to your work and see your outcomes. Beyond a factsheet, you might consider leaving behind a business card and even a clipping or printout of a recent (within the past year) positive news article about your initiative. Remember that all of the materials you leave behind should include your contact information as well as your initiative's Web site address if you have one.

You may only have a few minutes with your policymakers or their staff, so consider preparing a brief PowerPoint presentation or sharing a quick video such as the SS/HS commercial "Show Me How," using a laptop or tablet device such as an iPad. Any presentation you prepare should incorporate data to highlight key outcomes. Remember that presentations are an opportunity to once again align your SS/HS initiative with your policymaker's priorities and stated values.

#### Step 4: Meeting Your Policymakers

Now that you have all you need for your visit, follow these tips to make sure your meeting is successful:

**Be on time.** Find out ahead of time where offices are located. If you are visiting your congressional representative and both of your senators on Capitol Hill, make sure you allow enough walking time between appointments (approximately 20 minutes) to arrive promptly.

**Share the purpose of your visit.** Kick off your meeting by acknowledging some work that the policymaker has done that aligns with your SS/HS initiative's work. You can highlight your appreciation for their values (e.g., fiscal restraint, early childhood development, safer communities) and/or specific legislation they have authored or publicly supported. Be sure to communicate that the purpose of your visit is to tell them more about the problems your community has faced, your approach to these problems, the successes you've seen as a result of SS/HS, and your conviction that this model can succeed and be sustained by communities.

**Tell your SS/HS story.** Including the human stories of how SS/HS programs and services have positively affected students' and families' lives humanizes the work of your initiative. Stories can be used to highlight examples of valuable systemic and lasting changes that will live beyond your grant, and they are a strong way to put a face on the data that demonstrate the effectiveness of your SS/HS programs.

**Remember to be succinct!** Stay on message and assume you will have no more than 10 minutes at the office. Answer questions to the best of your ability. If you don't know the answer, say so and promise to obtain any information or data that was requested. Don't promise what you cannot deliver.

**Remember your “ask.”** Use this first meeting as an opportunity to develop a relationship with your policymaker and his/her staff. You can do this with a brief “ask” that sets the stage for followup outreach and education. For instance—

- Ask legislators to visit your community and schools to see the SS/HS programs in action. Invite them to an upcoming community event or create a special event that might motivate them to attend (e.g., an awards dinner at which they are publicly thanked or a press conference around an issue of importance to them, such as bullying).
- Ask when is the best time/what is the best way to communicate with the office again about the future successes you will want to share.
- Ask if there is any additional information their office would like to have about the work of your initiative. If there is no immediate request for information, let the office know that you are happy to help answer future questions they might have. Follow up promptly on any promises made during your visit.

**Communicate your gratitude.** Thank everyone you meet for his/her time. Write thank-you letters reminding the legislator and/or staff that you are an available resource to speak about the issues of youth violence, substance abuse, school safety, and mental health in your State.

If you remember nothing else when meeting with your policymaker, stick to the saying “Be brief. Be bright. Be gone.”

## Step 5: After Your Meeting

Once your meeting ends, it’s time to begin the followup process. Here are a few tips to help you maintain the momentum while your meeting is still fresh in your mind:

- Capture notes from your meeting and identify any information you need to follow up on.
- Write your thank-you letters. Do this as soon as you can after your meeting; don’t let too much time go by!
  - Repeat your offer to become a resource for their office in the areas of prevention, school climate, and social-emotional learning.
  - If you can include it, provide the links, statistics, or other items you offered to follow up on within your letter or email.
- Share the outcomes from your meeting with your Core Management Team members and/or key initiative stakeholders. Meeting with your policymaker is a big step for your initiative; don’t keep it a secret!
- Think about the future. What upcoming SS/HS events or presentations can you invite your policymaker to attend to see SS/HS in action? When will you need to reach out?

From premeeting research to postmeeting followup, these five steps will prepare you to educate policymakers, from your local government offices to your State capital to the Nation’s Capitol, about the importance of your SS/HS initiative.

*This guide was created for Safe Schools/Healthy Students grantees by the Communication & Social Marketing (CSM) Center—a partnership of ICF International, The Gallup Organization, and Kauffman & Associates, Inc.*