

SCHOOL + STATE  
FINANCE PROJECT

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# NAVIGATING POLICY AND ADVOCACY

Norwalk ACTS

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# Contact Us

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# Agenda

- What is policy, and how do we connect with it?
- What is advocacy?
- Why do we use storytelling?
- How do I build my story?
- How do we build relationships with decision-makers?
- How do I advocate and share my story to change policy?

# UNDERSTANDING POLICY

# What is “Policy”?

- Policy refers to a set of guidelines designed for decision-making.
- We interact with policy every day, whether it is the return policy of Walmart or the attendance policy at our children's school.
- Within the context of government and public policy, we are talking about what the government (local, state, or federal) chooses to do, or not to do, about a problem.

# What is “Public Policy”?

Policy...

- is made in response to an issue or problem that requires attention.
- might take the form of law(s) or regulation(s).
- is made on behalf of the "public."
- focuses toward a goal, such as the solution of a problem.
- is made by governments, although ideas can come from outside government.

Policymaking is an ongoing process, because the effects of policy are continually reassessed, revisited, and revised.

Source: Project Citizen. (n.d.). What is Public Policy? Retrieved from <https://www.civiced.org/project-citizen/what-is-public-policy>.

# Difference Between Law/Policy and Regulations

- **Law/Policy** is what guides decision-making.
  - *EX: Policy states all students must have written parental permission to participate in high contact sports like football. This policy has been determined and is non-negotiable.*
- **Regulation** is how a policy is actually carried out in practice.
  - Regulation allowed for a form to be **sent home with the student**, signed by the parent and returned to school.

# Different Levels of Policy

Policy can come from the federal, state, or local level.

Generally speaking, federal policy overrides state policy, and state policy overrides local policy.

- **Federal Examples:** Standardized testing, federal funding for Title I (economically disadvantaged schools or school districts)
- **State Examples:** ECS, COVID guidelines, curriculum topics, recess time
- **Local Examples:** Bullying (school climate), suspension/expulsion, trans & gender-expansive

# Process of Passing Policy

- **Idea or Issue Brought to Body:** Member of governing body submits the idea for discussion. Bill sponsored by elected rep. and submitted to agenda.
- **Included in Agenda:** Body president, or voted on to agenda.
- **Voted into Committee:** To discuss details and draft it.
- **Voted out of Committee:** Committee approves the draft to send to body.
- **Passed by Body:** Added to a business meeting agenda, debated and voted on.

# Things to Consider When Reading through Policy

- Policy is written for a legislative audience, not a community one. Small words, like “must” and “shall”, have very different meanings.
- It’s normal to struggle to understand what the policy actually means -- don’t get discouraged!
- Even if a policy says something specific, it could still be executed differently -- make note of instances where this happens because it could mean it’s not a very effective policy.

# What Makes a Policy “Good”?

**In order to evaluate whether a policy is “good,” there are a few key questions to ask yourself:**

- How acceptable is it for the community? Does it make sense to have this policy?
- Is this a policy created to prevent damage to a community or was it created after damage was inflicted on a community?
- Does this policy help create a more positive culture?
- Do people need this policy to guide major decisions or is it just a safeguard?
- How do people in the community feel about this policy?

# Key Areas of Policy Analysis

- **When** did this policy go into effect?
- **What** issue is this policy supposed to address?
- **Explain** what this policy means/does.
- How does it **impact** your community?
- What are the **benefits** of this policy?
- What are the **problems** with this policy?
- What would you **change** about this policy?

# Breakout Action

ADVOCACY  
AND  
STORTELLING

# What is Advocacy?

In the broadest terms, advocacy is any action taken supporting a cause or pleading a case.

Advocacy is about having your voice heard and considered when decision-makers are considering policy decisions.

Examples of advocacy can include phone calls or emails to elected officials, writing an Op-Ed or letter to the editor in a newspaper or online publication, or even a lawn sign.

# Some Ways to Advocate

- Speaking up at a local board of education meeting
- Attending a rally showing support for a proposed policy
- Emailing or calling a legislator
- Testifying at a public hearing
- Distributing or signing a petition
- Displaying a sign in your yard
- Sharing a post on social media

Advocacy is about having your voice heard in a memorable way.

Including your story, your lived experiences, is essential for successful advocacy.

# Why is Storytelling Important?

- **More areas of the brain are activated through story than with fact alone**
  - You want people actively listening.
- **Experiencing emotions enhances memory**
  - You want people to remember what you have told them, especially because there are a lot of issues competing for attention.
- **Connection points are created between a listener's experiences and the person who is telling the story – this is exactly what you are trying to do!**
  - When people identify with you, you become memorable.

# **Reflect on a story someone told you that you remember**

We all have heard stories from our friends

**What made it a memorable story?**

# STORYTELLING IN 3 PARTS

# There are 3 critical components to storytelling as a public narrative:

- Story of Self
- Story of Us
- Story of Now

Marshall Ganz originated the public narrative concept reflected in this section.

# Story of Self

- The guided question here is: **Why do you care about this issue?**
- What brought you to the point where you decided to take action on this issue?
- This is your opportunity to build credibility with your listeners.
- Who you are provides some perspective about how you see an issue.

# Try it Out

- Let's take a few minutes to try it
- My name is \_\_\_\_\_
- I live in \_\_\_\_\_
- I am here to talk about school finance.
- I care about school finance because \_\_\_\_\_\*.

\* Right now, let's keep this to 5 sentences or less.

## Story of Us

- How does your story fit into the bigger picture of schools and communities?
- Is your story an anomaly or is it something others may experience?
- Audience matters – if you are talking to a local decision-maker, the story of us is different from testifying before a state legislative hearing.

## Try it Out

- Not only has school finance affected me, but it affects others in my community/state.
- For example, \_\_\_\_\_.
- Additionally, \_\_\_\_\_\*.
- Think of this as an opportunity for two things:
  1. An opportunity to tell an additional story.
  2. An opportunity to integrate some facts.

## Story of Now

- What choice or action are you asking people to take?
- Why is now the appropriate time for this action?
- When you are asking someone to take an action, they need to understand both why the action is critical, and why the time is ideal to act.

## Try it Out

- I am asking you to \_\_\_\_\_.
- The time for this action is now because  
\_\_\_\_\_.
- This is also a time to articulate how a proposed solution will change the problem you are concerned about.

# A FEW THINGS TO REMEMBER

# Who is Your Audience?

- Are they...?:
  - Community members
  - Influencers
  - Decision-makers (state or local)
  - Business owners
  - Parents
- Are these people you know, or people you are speaking to for the first time?
- What is their frame of reference on the issue?

# **What is your truth on the topic of school finance (or what you are speaking on)?**

- What have you witnessed or experienced as a result of inequitable school funding?
- What have you witnessed that made you concerned about how we fund schools in Connecticut?
- Is there a particular moment in time or fact that stands out to you as critical to your willingness to take action?

# How does the story evolve?

- Your story should have a beginning, middle, and end.
- There should be a main character in your story (your child or you, for example)
- Who is the story about, and how is this person relatable to your audience?

# What is the specific problem you are speaking about?

- Make clear connections between school funding inequity (facts) and experiences (story).
- Data should be used for impact. Be thoughtful about this and do not overwhelm your listener or reader with a litany of data.
- Your story is the most important piece of this, and data accents it.

# **How will a proposed solution change the problem you are pointing out?**

- How will the outcome of your story be different if a proposed change or solution is enacted?
- Think of this as a "pick your own ending" story – you are putting the listener into the position to determine the best outcome for the hero of your story.

# Breakout Action

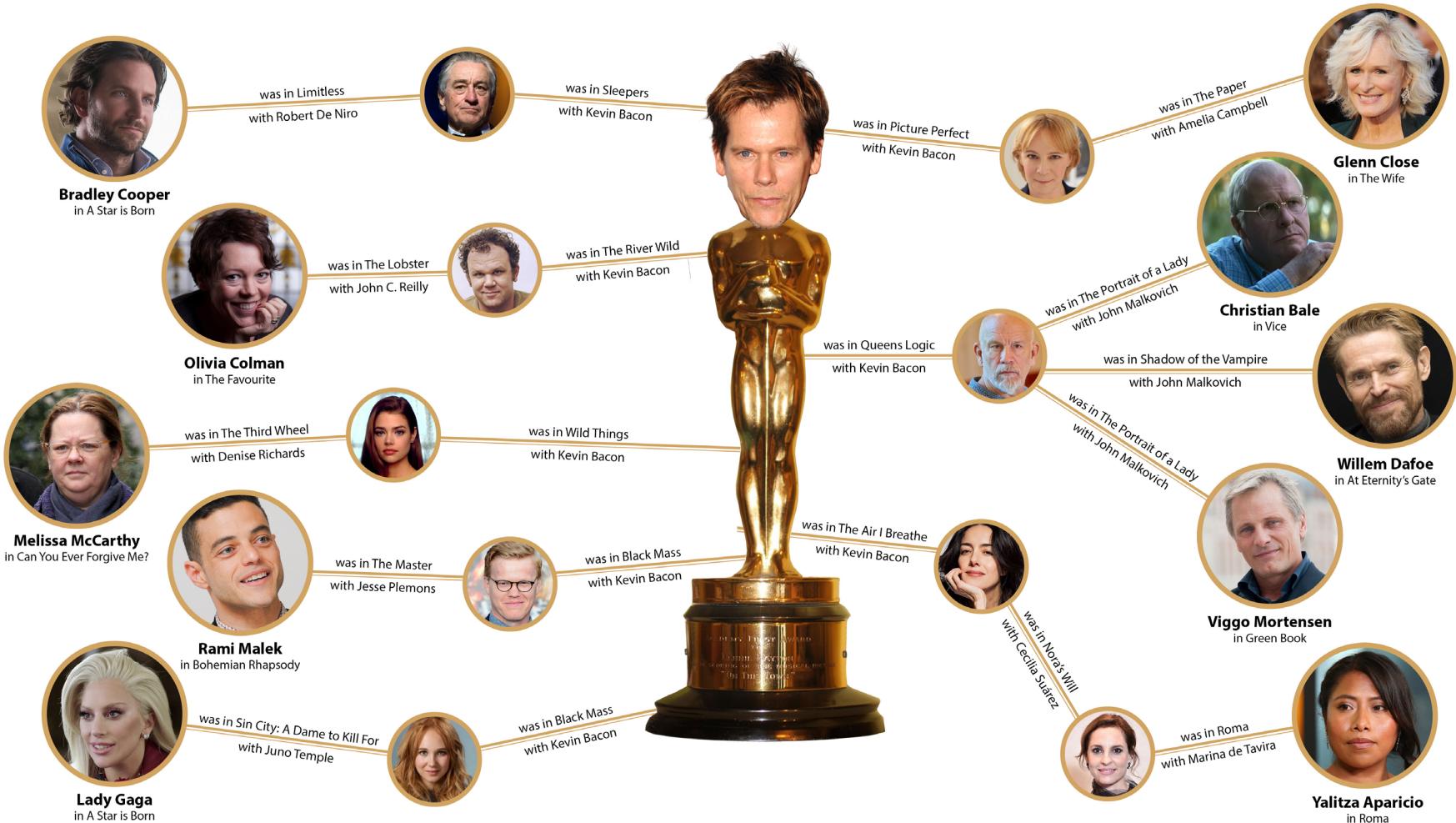
# BUILDING RELATIONSHIPS

# Questions to Explore

- What do we need to know to effectively build relationships?
- Who are the people you need to build relationships with, and what are their roles?
- How do you approach relationship building?
- What are some different opportunities to relate?
- What types of methods are there for building relationships?

\*\* It is important to note that we will primarily be focusing on building relationships with decision-makers in order to be a change agent. \*\*

# 2019 OSCAR NOMINEES' CONNECTION TO KEVIN BACON



Source: <https://halfpriceblog.files.wordpress.com/2019/01/kevinbaconoscar.jpg> accessed 1/2/2020

# KEY KNOWLEDGE POINTS

# **Relationships Don't Just Happen**

**3 things to understand for effective relationship building:**

- 1. Who** do you need to build a relationship with?
- 2. Why** do you need to build a relationship with them?
- 3. How** are you going to do so?

# Our Lives Revolve Around Relationships

Let's explore your current relationships through a relationship map.

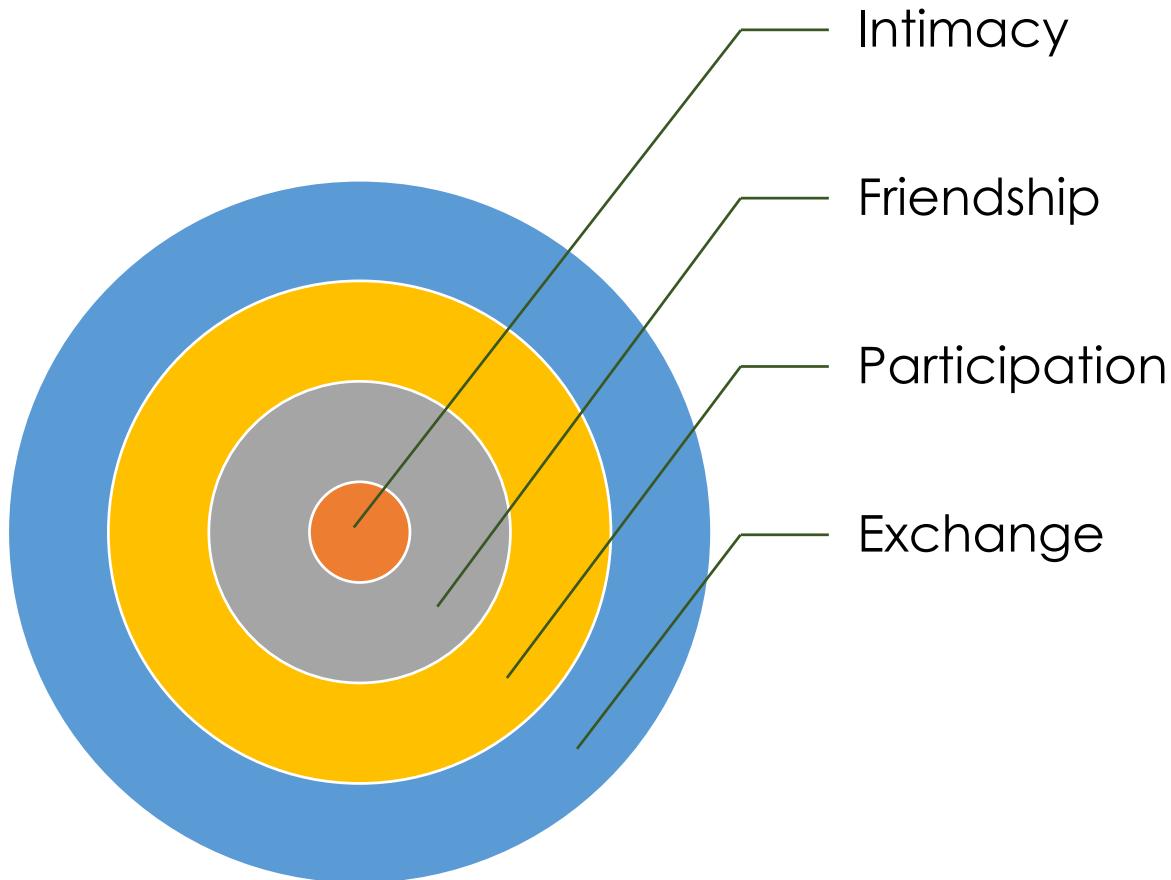
## **What is a relationship map?**

An image that visualizes relationships and connectivity.

## **A relationship map can be used to:**

- Help understand relationships
- Help organize your social networks to meet your goals
- Understand roles, communication, and emotions in relationships

# Personal Relationship Map



# What is at the root of relationships?

## How do you connect with people?

If you attend the an event or conference and sit at a table with new folks, what do you do?

You size people up and try to figure out where they will fit on your personal relationship map.

- You listen and learn, by asking questions.
- You find commonalities: hobbies, friends, geography, work, etc.
- You assess their trustworthiness.

Ultimately, you decide where to place someone on your personal relationship map, and what their potential for mobility is.

WHO ARE THE PEOPLE  
WE NEED TO BUILD  
RELATIONSHIPS WITH?

# Decision-Makers and Influencers

**Decision-makers** are those people who have a direct vote in the policy you are interested in.

**Influencers** do not have a direct vote but are the people that the decision-maker trusts. When an influencer talks, decision-makers listen.

Decision-makers and influencers are situation or issue specific. They may be the same people for several issues, or may change each time.

# What does their relationship map look like?

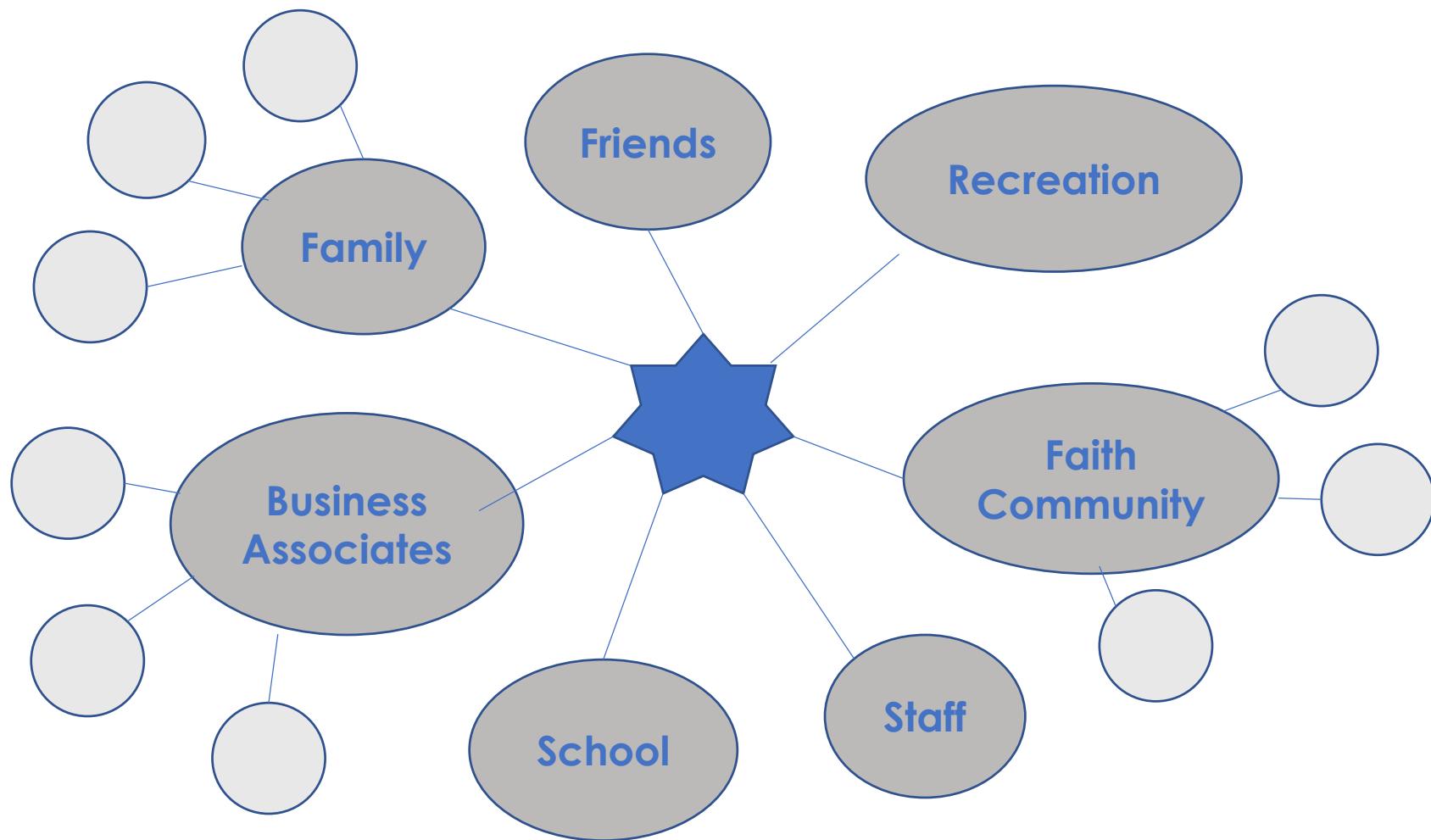
This map can be less personal than your relationship map, but it is important to understand. This is more commonly referred to as **power mapping**.

Power mapping is a visual way of understanding relationships and networks in trying to make change happen.

Steps to power mapping:

- 1) Identify the decision-maker you wish to build a relationship with.
- 2) Place the decision-maker in the center of this map.
- 3) Build out what you know and what you learn. This can be as detailed or as broad as you would like.

# Power Mapping



WHAT DOES ALL OF  
THIS MAPPING TELL US?

# Mapping Tells Us

- Who we need to build relationships with in order to make change happen
- Who we know that can help us with those changes
- How to best build a relationship
- The type of relationship we can build

# Relationships can be either:

## Transactional   OR   Relational

- Self interest
- Get
- Keeping in touch
- Win conflict
- Agreement
- Evaluate results
- Short-term (not necessarily singular)
- Shared interests
- Give
- Staying informed
- Resolve conflict
- Acceptance
- Evaluate how the other feels about the results
- Long-term

What do you need to get out of it?

Can you give me some examples?

**The type of relationship you  
want determines the  
method of relationship  
building**

# Methods of Relationship Building

This is all about communication.

- Proactive v. Passive
- Formal v. Informal
- In-person v. Electronic
- Frequency

# Relationship Building Must-Haves

- ✓ Integrity/Honesty
- ✓ Respect
- ✓ Care/Kindness
- ✓ Knowledge/Facts

# Opportunities to Relate

- ❖ Thanking
- ❖ Asking
- ❖ Informing
- ❖ Supporting
- ❖ Opposing
- ❖ Being a presence

# Other Interested People

This is when your maps meet.

Who on your personal relationship map may have similar interests?

Who on your personal relationship map is connected to the decision-maker you need to connect with?

Relationships never exist in isolation.

# Breakout Action

# QUICK TIPS FOR EMAILING

# The Subject Line

- Should be clear and concise
- Answer the question “What is this in regards to?”
- Should not be yelling - No caps lock
- Should not use negative language such as “I’m horrified that you...” or “How could you let this happen?!?!”
- Positive examples:
  - Education Cost Sharing Formula
  - Inquiry about per-pupil funding

# Should you CC? How about BCC?

## CC

- Are you including other relevant people in the conversation?
- Usually indicates the people that have an interest in the conversation but are not expected to participate

## BCC

- Do you want to hide email addresses or the people seeing the conversation?
- Includes someone who may benefit by being aware of the conversation
- Signals there is not an expectation to participate

# What Do You Want? The 4 Types of Email

- **Informative**
  - The email is the point; you want to tell someone something, even a compliment
  - No response is required
- **Inquiry**
  - You have a question you need answered
  - A reply is needed
- **Discourse**
  - To keep lines of communication open and maintain a presence
  - A response is ideal but not always necessary
- **Action**
  - You want the receiver to take a specific action
  - A response is typically expected, but you must be clear

# Set Expectations

- You already identified the type of email you are sending
  - Self-fulfilling
  - Inquiry
  - Dialogue
  - Action
- It is important to clearly articulate what you expect.
- If no action is required, state so.
- If you expect a next action, clearly state it.
- Minimize questions (1-3); otherwise it becomes difficult to keep track of and respond to.

# Different Perspectives: Recipients and Senders

## Recipient

- Gets a lot of email; routinely gets asked questions and for favors; regularly receive complaints
- You do not have a close friendship
- It is easiest to respond to emails that are clear and quick
- Doesn't mind helping, but the faster the better
- With many emails, they will take care of many short ones rather than one long one

## Sender

- Spends a long time writing the "perfect" email
- Is deeply passionate about the issue
- Wants to explore the whole story, from every angle, so the recipient can truly empathize

# Introduction and Context

## Introduction

- Pretend you are introducing yourself face-to-face
- Be yourself
- Tell them who you are and how you are connected
  - If you don't tell your state senator that you are a constituent, they may think this email is not relevant to them.

## Context

- Get to the point quickly and simply. Why are you emailing the recipient?
- Conversational English
- Brief, not boring
- Think about it – if you were composing the email on your phone, would you still write the same length?

# Integrate Your Storytelling

- You've explained your connection to the issue, leveraged the emotional connectivity, and engaged the memory, so now is the time to use it.
- There is no one right way to do this:
  - In the middle of the email
  - Interspersed throughout the email
  - Near the end

# Technical Details

- **Use positive, rather than negative phrases**
  - Negative: failure, problem, crisis, unfortunate, trouble, consequence
  - Positive: opportunity, positive change, challenge
- **Avoid extreme phrasing**
  - Deeply, extremely, really, very
- **Spell check**
- **Attachments and hyperlinks**
  - Tell the receiver there is an attachment/link
  - Tell the receiver why the attachment is important
  - “I’ve attached X for you for Y purpose”