

Community Engagement and Education Advocacy by School Boards

August 2013



In the following report, Hanover Research examines effective methods for school boards to both engage the community and advocate for favorable education policy. With respect to each activity, the report justifies its necessity, discusses how to plan strategically, and identifies specific methods for accomplishing the task. The report also profiles an exemplary community engagement program and an organization that assists school boards in lobbying policymakers.

TABLE OF CONTENTS

- Executive Summary and Key Findings 3**
 - INTRODUCTION 3
 - KEY FINDINGS 3
 - Community Engagement 3
 - Advocacy 4
- Section I: Community Engagement 5**
 - THE IMPORTANCE OF COMMUNITY ENGAGEMENT 5
 - STRATEGIZING COMMUNITY ENGAGEMENT 6
 - USEFUL METHODS FOR COMMUNITY ENGAGEMENT 9
 - PROFILE: THE “WHAT COUNTS?” PROGRAM 10
- Section II: Advocacy 12**
 - THE IMPORTANCE OF ADVOCACY 12
 - STRATEGIZING ADVOCACY 13
 - USEFUL METHODS FOR ADVOCACY 14
 - PROFILE: MISSOURI SCHOOL BOARDS’ ASSOCIATION 19
- Appendix A 20**

EXECUTIVE SUMMARY AND KEY FINDINGS

INTRODUCTION

School boards must achieve a balance between ensuring student achievement and meeting the broader needs of the communities they serve. The role of school boards is diverse, and includes strategic planning, defining academic standards, aligning assessments, and ultimately holding schools accountable.¹ In addition to managing schools, though, board members have a responsibility to engage the local community and advocate on behalf of the district. The National School Boards Association (NSBA) states that local board responsibility includes “advoca[cy] for local public education with other local, state, and federal governmental entities.” Furthermore, it defines “collaborative relationships” as a key focus area for school boards, and encourages board members to:

- Build collaborative relationships with political and business leaders to develop a consensus for student success;
- Communicate regularly with federal and state officials about student achievement; and
- Model behavior that emphasizes trust, teamwork and shared accountability.²

When executed effectively, these activities secure support from families, government officials, and other key players. Accordingly, this report examines both community engagement and advocacy, in two respective sections. The two sections are structured similarly; each discusses the importance of the activity, strategizing techniques, useful methods for accomplishing the task, and an exemplary program.

KEY FINDINGS

COMMUNITY ENGAGEMENT

- **School districts approach community engagement strategically to raise academic achievement, strengthen students, and improve the communities they serve.** Research suggests that school districts have increasingly incorporated community engagement in recent decades, and experts argue that effective community engagement ultimately improves student outcomes.
- **School boards address community engagement by first understanding the public’s expectations and then identifying key external stakeholders to support district programs and initiatives.** Experts assert that stakeholder relations management should be a high priority of every school board. District leaders can rank external stakeholders according to importance, and hold individual board members accountable for developing and maintaining relationships with certain groups or individuals.

¹ “Beliefs and Policies of the National School Board Association.” National School Board Association, April 12, 2013, pp. 14-15. <http://www.nsba.org/About/Beliefs-Policies-Resolutions/BeliefsandPolicies.pdf>

² Bulleted points taken verbatim from: Ibid., p. 15.

- **District leaders deploy proven methods for increasing community engagement, including community conversations, study circles, focus groups, and polling.** Improving communication between stakeholders and district officials is central to any effective community engagement method. School boards facilitate discussions and assess public needs to strengthen their voice regarding education issues.

ADVOCACY

- **Resource allocation for school districts is at the discretion of local, state, and national governments, so school boards must advocate for favorable education policy.** School districts are constantly challenged to meet the expectations set forth in mandates because they are not granted enough resources. Therefore, school boards must lead the public in demanding support and securing resources for strong educational systems.
- **Effective school board advocacy includes thoughtful planning, outspoken district representatives, and reliable networks of supporters.** Board members must conduct thorough research on each issue they plan to advocate, as they must explain the problem and propose a viable solution. To gain support, district leaders must be forthright and willing to take on oppositional groups and individuals.
- **District leaders lobby government officials by using virtually all forms of communication,** including:
 - Writing letters and emails,
 - Conversing via telephone,
 - Attending face-to-face meetings,
 - Composing research-based position papers, and
 - Testifying at public hearings.

SECTION I: COMMUNITY ENGAGEMENT

This section examines the responsibility of a school board to engage the local community. First, the section justifies the need for effective community engagement by explaining how the practice can improve student outcomes. Second, the section discusses how school boards can strategically plan to address community engagement. Third, the section identifies specific methods that school districts can use to improve community engagement. Lastly, the section profiles the “What Counts?” program, a community engagement method developed by the Maryland Association of Boards of Education (MABE).

THE IMPORTANCE OF COMMUNITY ENGAGEMENT

Over the past two decades, public school districts have increasingly incorporated community engagement into their strategic plans for several reasons. First, recent public opinion polls have shown high levels of interest in student achievement. Indeed, the public is directing a good deal of focused scrutiny and criticism toward the nation’s public school systems. Further, research also suggests that there is a growing gulf between the public and its schools.³ Not only do people feel disconnected from schools, but fewer than 27 percent of adults have children in school, which means that those adults with a direct connection to the public education system form a marked minority.⁴ Finally, the U.S. government has incorporated community engagement into its educational policy. The No Child Left Behind policy requires, among other things, that all schools receiving Title I funds:

- Develop a written parent involvement policy with parents and approved by parents.
- Notify parents and the community about this policy in an understandable and uniform format.
- Use at least 1 percent of the school’s Title I funds to develop a parent involvement program ... The law defines parent involvement as activities that “improve student academic achievement and school performance.”
- Give parents detailed information about student progress at the school.⁵

In response to these trends and requirements, school districts are turning to their communities – indeed, are dependent on their communities – for support to “meet mandated state and national performance standards, develop innovative programs, and secure financial resources.”⁶ Thus, community engagement can have a real impact on students and their lives. The Oregon School Boards Association (OSBA) explains that

³ Wright, A. and Saks, J. “The Community Connection: Case Studies in Public Engagement.” National School Boards Association, 2000, p. 6. <http://eric.ed.gov/?id=ED445146>

⁴ Vollmer, J. *Schools Cannot Do It Alone*. Enlightenment Press. July 2010.

⁵ Bulleted points taken verbatim from: Henderson, A. T. and Mapp, K. L.. “A New Wave of Evidence: The Impact of School, Family, and Community Connection on the Student Achievement.” SEDL, 2002, pp. 76-77. <http://www.sedl.org/connections/resources/evidence.pdf>

⁶ Cunningham, C. “Engaging the Community to Support Student Success.” *Teacher Librarian*, 31:4, April 2004. <https://scholarsbank.uoregon.edu/xmlui/bitstream/handle/1794/3380/digest157.pdf?sequence=1>

community engagement can facilitate four goals that are central to the mission of a school board:

- **Raising student achievement** - By involving parents, members of the business sector and others in identifying academic goals, standards, resources and measures of progress, community engagement can be a powerful engine for raising student achievement.
- **Strengthening the whole student** - If raising academic achievement is the ultimate goal, the community as a whole may need to pay greater attention to the social and health conditions that can interfere with learning. Teenage pregnancy, drug abuse, gang involvement, attendance, nutrition and health care all have effects on how well students learn.
- **Strengthening communities and schools** - By convening the community around education issues, the school board can take a leadership role in leading people to think about and take action on other ways to improve community life.
- **Strengthening representative and participatory government** - Public trust in government institutions is low. Boards that engage their communities are involving the public in making big decisions and re-engaging citizens with their representative voice in public education governance.⁷

Districts may consider community engagement a natural occurrence, given the numerous stakeholder groups involved in education. However, experts encourage school boards to approach engagement strategically to achieve the goals mentioned above. School boards must intentionally plan and include community engagement in their strategic plan for district improvement.

STRATEGIZING COMMUNITY ENGAGEMENT

Approaches to public engagement in education are traditionally top-down, meaning experts make a decision and then try to convince the public to support it. An alternative approach, and one that is increasingly viewed as “authentic engagement,” is a “substantive give-and-take with those who have a vested interest in the decisions being made.”⁸ The OSBA states that “[b]oards should view community engagement as a strategic, proactive opportunity to strengthen their school systems.”⁹

This type of engagement brings together the educational leaders of a district with a broad representative sample of the surrounding community in a spirit of collaboration. Board members should seek to understand the public’s needs, concerns, and expectations, and “determine how parents, business people, and other members of the public can actively support children, their education, the school system and the community.”¹⁰

⁷ Bulleted points taken verbatim from: “Boards and Community Engagement.” Oregon School Boards Association, July 28, 2009. http://www.osba.org/Resources/Article/Community_Relations/Boards_and_Community_Engagement.aspx

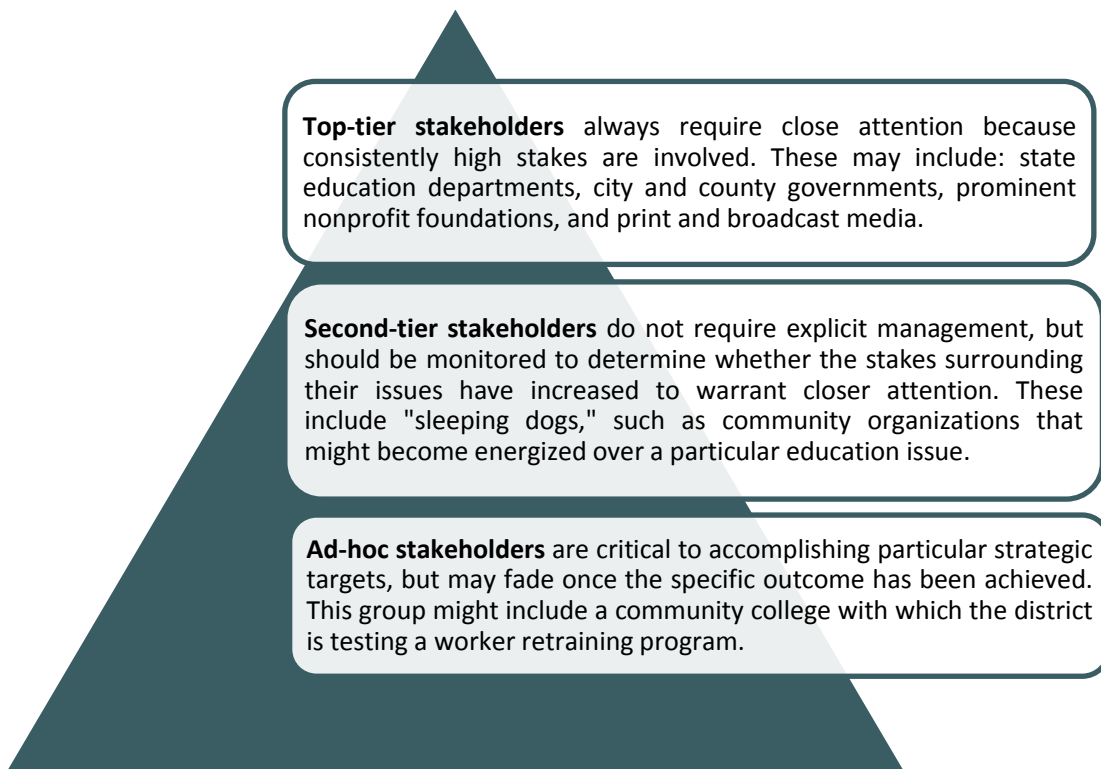
⁸ Johnson, J. and Friedman, W. “Dear Public: Can We Talk?” *School Administrator*, 63:2, February 2006. <http://www.aasa.org/SchoolAdministratorArticle.aspx?id=8662>

⁹ “Boards and Community Engagement,” Op. cit.

¹⁰ Ibid.

Experts explain that “creative stakeholder relations management” should be a serious priority for every school board.¹¹ Every district has *internal* stakeholders, such as employees and parents, and *external* stakeholders, such as government entities and civic clubs. External stakeholders tend to be overlooked, which can adversely affect community support for school district initiatives. Conversely, **school boards benefit from understanding external groups and maximizing their potential.** Figure 1.1 presents three tiers, or categories, of external stakeholders that vary in terms of importance, according to the *American School Board Journal*. Top-tier stakeholders, such as government entities, demand close attention, whereas ad-hoc stakeholders need only be called upon in opportune situations.

Figure 1.1: Three Tiers of External Stakeholders



Source: American School Board Journal¹²

Understanding various stakeholders and their potential value is the first step toward an effective community engagement strategy. Importantly, engagement efforts must be explicit, and individual board members must be held accountable for developing relationships. Experts indicate that districts’ community engagement programs should comprise the following elements:

¹¹ Eadie, D. “High Stakes Strategy.” *American School Board Journal*, January 2009, p. 43. <http://www.nsba.org/Board-Leadership/Governance/KeyWork/Collaboration-Resources/stakeholder-strategy.pdf>

¹² *Ibid.*, pp. 43-44.

- Identifying the key stakeholders and calculating the stake involved.
- Determining the strategic governing team members who should have primary accountability for developing and carrying out the relationship with each of the top-tier stakeholders.
- Developing a detailed strategy for developing and maintaining each top-tier relationship.
- Overseeing and managing the program’s implementation.¹³

Experts emphasize that community engagement must be intentional, strategic, and sustained over time. This may represent a departure from current procedures, as many districts address public engagement inconsistently. To strategize effectively, district leaders must accept that engagement requires more than simply information dissemination. Instead, it requires a long term commitment and relies on interactive, meaningful dialogue between community members and district officials. Figure 1.2 presents the Colorado Association of School Boards’ representation of a board’s role in engaging the community.

Figure 1.2: Defining Community Engagement

COMMUNITY ENGAGEMENT...	COMMUNITY ENGAGEMENT IS NOT A...
<ul style="list-style-type: none"> ■ Is an ongoing, continuous and long-term process. ■ Involves “listening to” and “deliberating with” members of the public. ■ Uses a variety of strategies to reach the full community. ■ Seeks to find common ground among stakeholders. ■ Centers on policy-level concerns rather than day-to-day decisions. ■ Is often a new way of doing business for a board and a community. 	<ul style="list-style-type: none"> ■ Quick fix to a problem or issue. ■ Research tool or survey. ■ Forum for debate. ■ Publicity method. ■ Strategy for educating or persuading people.
IN EFFECTIVE COMMUNITY ENGAGEMENT...	
<ul style="list-style-type: none"> ■ The entire board agrees that engaging the community is an essential part of the board's role. ■ The board and administrative team develop a long-term plan for community engagement. ■ The community engagement effort is well communicated to staff and, in some cases, includes staff. ■ The issues discussed rise to a policy-level concern and are framed in public terms. ■ Community engagement sessions create dialogue, not debate or lecture. ■ Community engagement is a sustained effort, not a one-time activity. ■ Community engagement engenders a shared responsibility for big concerns; it is not used to solicit support for a predetermined or one-time decision. 	

Source: Colorado Association of School Boards¹⁴

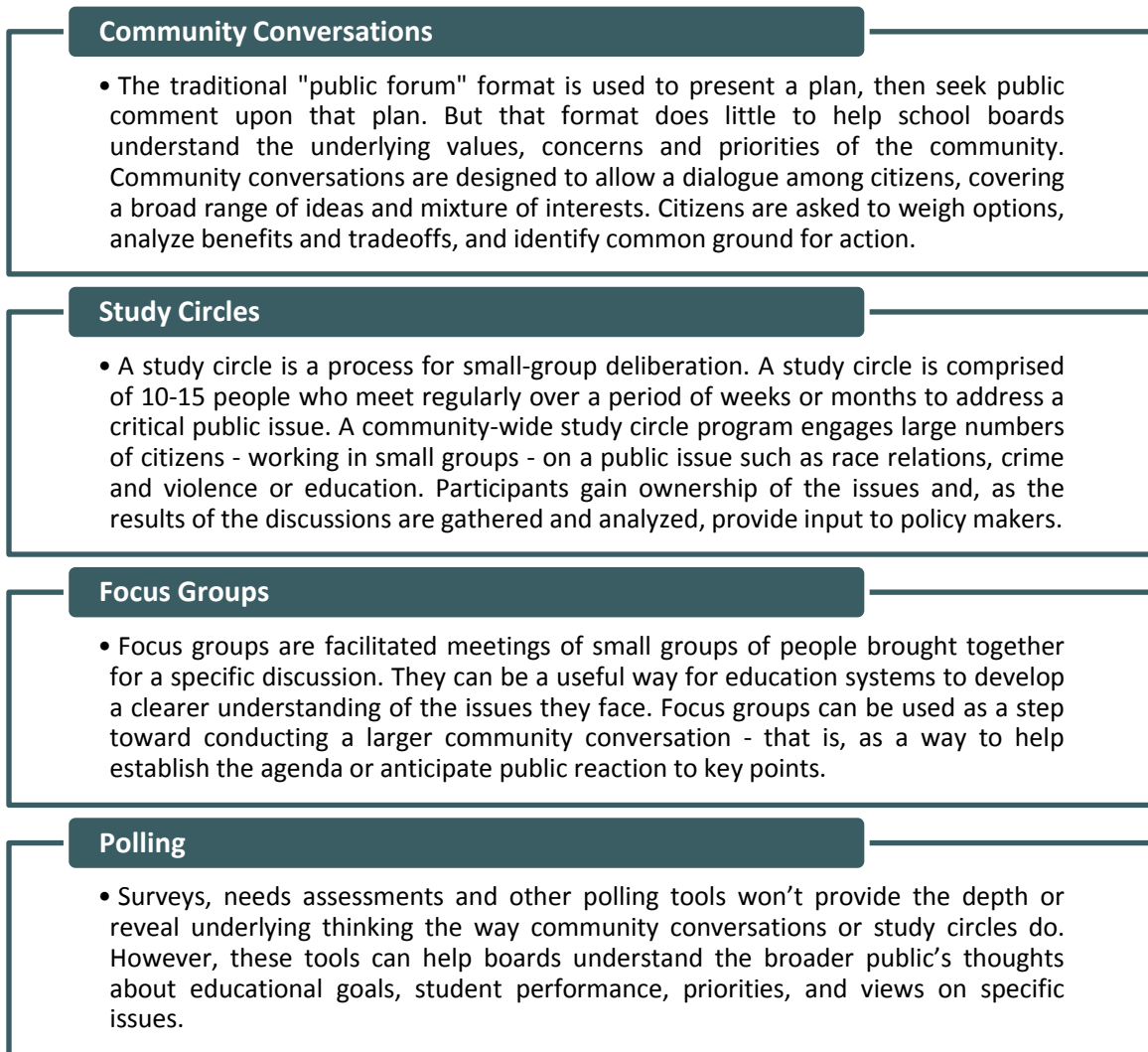
¹³ Bulleted points taken verbatim from: Ibid., p. 44.

¹⁴ Table contents taken verbatim from: “The School Board’s Role in Engaging the Community.” Colorado Association of School Boards. http://casb.org/Files/HB%201118/hb_1118_boards_role_eng_comm.pdf

USEFUL METHODS FOR COMMUNITY ENGAGEMENT

Once the school board develops and commits to a strategy for community engagement, it must rely on proven methods to achieve its desired outcomes. Figure 1.3 presents four tools for community engagement, including **community conversations, study circles, focus groups, and polling**. Although the structure of each method differs, the purpose of each is to strengthen the voice of community members so they have a real say in education policy and school district operations. In community conversations, study circles, and focus groups, community members are brought together to discuss education issues. Board members can facilitate, observe, and participate in the conversations. Contrarily, polling is less interactive, but can effectively assess public opinion on relevant educational issues.

Figure 1.3: Community Engagement Tools



Source: Oregon School Boards Association¹⁵

¹⁵ Figure contents taken verbatim from: "Boards and Community Engagement," Op. cit.

Experts also encourage districts to **improve media relations** in order to sell their success. The current media environment is fast-paced and tends to focus on negative stories. School districts are often subjected to “swift-boating,” whereby media outlets unfairly or untruly attack their actions, or simply find that the media is more receptive to negative than to positive stories.¹⁶ To combat this tendency, districts can shift from defense to offense by making media relations a priority. Board members and district officials should identify notable events, programs, and initiatives that may lack easily observable news value, and pack and deliver it as newsworthy. Experts encourage districts to use new media such as blogging, social media, and podcasts. Ultimately, “districts that develop relationships with education reporters and offer to be a resource are the most successful.”¹⁷

PROFILE: THE “WHAT COUNTS?” PROGRAM

One example of a community conversation method is a joint initiative of the Maryland Association of Boards of Education (MABE) and Maryland school districts. The highly interactive “What Counts?” program invites citizens to attend a group session with board members to determine what the community values most in public schools.¹⁸ Organizers aim for participation of 40-80 attendees that represent various components of the community.¹⁹

Participants explore what defines quality in the education system by breaking into small groups and selecting their top signs of quality in schools. Then, individuals walk to neighboring tables and discuss their rationale. In some cases, this involves using large poster boards around the room that allowed participants to use colored sticky notes to identify their priorities. Topics may include a variety of issues, including graduation rates, parental involvement, the availability of technology, school appearances, knowledgeable teachers, and programs for gifted students.²⁰

The “What Counts?” sessions have received impressive attention from community members. For instance, over 50 people attended the sessions at Cecil County Public Schools, a district that serves about 17,000 students. Session participants were intrigued and engaged by the invitation, which read:

Explore ... how the effectiveness and quality of public schools should be measured. One important measure, certainly, is how well students perform on standardized tests. The central question to be explored at this forum is what ELSE should count in assessing the quality of the public schools?²¹

¹⁶ Carr, N. “Keys to Better Coverage.” *American School Board Journal*, January 2009, p. 41.
<http://www.nsba.org/Board-Leadership/Governance/KeyWork/Collaboration-Resources/keys-to-better-coverage.pdf>

¹⁷ Ibid., p. 42.

¹⁸ “Community Engagement.” Maryland Association of Boards of Education.
<http://www.mabe.org/services/community-engagement/>

¹⁹ “MD: Learning What Counts.” Center for Public Education, October 18, 2006.
<http://www.centerforpubliceducation.org/Main-Menu/Success-stories/Community/MD-Learning-what-counts.html>

²⁰ Ibid.

²¹ Ibid.

Participants' evaluations of "What Counts?" sessions have been extremely positive, with 99 percent indicating they would participate again. Further, some districts even noticed an increase in positive press coverage.²²

²² Ibid.

SECTION II: ADVOCACY

This section examines school boards' responsibility to advocate on behalf of the school district. First, the section justifies the need for advocacy by explaining how it can improve school operations. Second, the section discusses how school boards can plan strategically to advocate effectively. Third, the section identifies specific methods that board members can use to lobby legislators. Lastly, the section profiles the Missouri School Boards' Association (MSBA) and its practices in assisting member school boards to advocate effectively.

THE IMPORTANCE OF ADVOCACY

Education policy affects students and schools through funding, accountability, academic standards, and other regulations. Experts argue that these policies are frequently developed without enough input from local education agencies, and without full consideration of their impact on student learning. Legislators will continue to craft new education policy, and the onus ultimately falls on community members, educators, and district leaders to demand a say in the process.²³ The Wisconsin Association of School Boards' (WASB) toolkit for legislative advocacy explains that school board members are in a unique and prime position to advocate and positively impact education policy:

In seeking legislators' support of public education, locally elected school board members can make a difference that others in [the] community cannot. School boards have a responsibility to foster understanding and support of public education, lead the public in demanding a strong educational system and help establish a climate for change when change is necessary.²⁴

Resource scarcity is perhaps the greatest challenge facing school districts in the current economic and political environment. The primary reason is a disparity between the resources required to achieve educational outcomes and the resources provided by legislative bodies. As one Tennessee school board member puts it, the level of funding school districts receive from government bodies "has little or nothing to do with what [districts] need to meet their mandates" and "everything to do with what they are willing to appropriate."²⁵

Thus, effective advocacy is critical to secure the resources necessary for improving student outcomes. In this, school boards should recognize that "[p]ower comes from the fact that the public looks at education as one of its highest priorities." The public is typically willing to support providing more resources so long as they are tied to results. But to garner this support, school board members must approach advocacy strategically: "The challenge for

²³ "Advocacy Guide." Association for Supervision and Curriculum Development, 2008, p. 3.
<http://www.ascd.org/ASCD/pdf/newsandissues/ascdadvocacyguide.pdf>

²⁴ "Effective Legislative Advocacy: A Toolkit for School Board Members." Wisconsin Association of School Boards, Spring 2013, p. 1.
http://www.wasb.org/websites/advoc_gov_relations/File/legislative_advocacy_toolkit/2013_advocacy_toolkit_web.pdf

²⁵ "Advocacy Resource Guide." New York State School Boards Association, p. 16.
http://www.nyssba.org/clientuploads/nyssba_pdf/GR-Resource-Guide.pdf

school boards is to harness that public support and channel the debate and the agenda towards providing resources that are needed to provide a quality education.”²⁶

STRATEGIZING ADVOCACY

Bill Brow, chairman of the Tennessee Legislative Network, explains that **three elements are necessary to ensuring effective school board advocacy: thoughtful planning, unreserved and outspoken members, and the mobilization of public support.** First, similar to community engagement, effective advocacy requires **thoughtful planning.** Brow explains that a “plan that can be quantified and demonstrates a pathway to results will generate public support.”²⁷ Board members must determine exactly what resources are needed to achieve a specific outcome. To make such determinations effectively, advocates must conduct thorough research to develop a comprehensive understanding of the matter at hand. ASCD, a nonprofit educational services provider, recommends that individuals consider the following questions when analyzing education issues:

- What is the effect of the issue in my community?
- What does this mean to my local school, school district, and students?
- What is the cost of not doing anything on this issue?
- What possible actions can be taken? What are the consequences of these actions?
- Who else cares about this issue in my community?²⁸

Once district decision-makers determine what they want, they must actively sell their plan to the public. Although education is inherently valued among the public, local education agencies still have to compete for resources with other organizations. Additionally, taxes in and of themselves are a competing demand because the public must be convinced that making sacrifices for the community’s children is worthwhile.²⁹

Second, board members must be **unreserved and outspoken.** Brow explains that effective advocates “analyze the means of communication” and “step forward and grab the public’s attention.”³⁰ District leaders should develop a firm understanding of the local press and use it effectively. However, a crucial component of being outspoken is accepting the fact that there will always be opponents who disagree or do not appreciate the advocacy.

Third, effective advocacy requires **mobilizing public support.** Even a prominent district leader such as a board member is just one person, and will need backing from the community in order to gain momentum and make a real impact. Simply put, more supporters equates to a stronger voice, and stronger voices are more likely to increase

²⁶ Ibid.

²⁷ Ibid., p. 17.

²⁸ Bulleted points taken verbatim from: “Advocacy Guide,” Op. cit., p. 5.

²⁹ “Advocacy Resource Guide,” Op. cit., p. 17.

³⁰ Ibid.

funding, change laws, and demand resources that have the potential to improve students' futures.³¹

ASCD describes this process as **building a network**. District leaders are sure to find allies in the community that support their cause. Parents, religious leaders, senior citizens, health professionals, business people, realtors, and law enforcement officials are all citizens that are affected by education policy. Furthermore, gaining support from diverse groups will increase responsiveness from elected officials. ASCD explains that networks are particularly effective when they:

- Bring together different constituencies with a common goal
- Build support and legitimacy for an issue
- Raise the profile of an issue or group
- Rally resources to support a cause³²

Once an advocacy plan has been created and a reliable network of supporters has been developed, district leaders must actively communicate with decision makers in order to influence education policy.

USEFUL METHODS FOR ADVOCACY

Experts consider grassroots lobbying, which is driven by community members, critical to education advocacy. The North Carolina School Boards Association (NCSBA) explains that the purpose of lobbying is to “show legislators that there is a large constituency of members throughout the state who are informed and care about the decisions they will make affecting educational issues.”³³

School boards deploy a variety of methods to influence policymakers, all of which depend on effective communication. ASCD identifies five tools for communication, including **written communication and emails, telephone calls, face-to-face meetings, position papers and policy briefs, and testimony**.³⁴ Additionally, experts emphasize the importance of developing media relationships to communicate issues to large audiences.

Letters, faxes, emails, and other forms of **written communication** are relatively easy and inexpensive methods for advocacy. However, they are also the most likely to be ignored.³⁵ A sample letter is provided in Appendix A; for email, ASCD provides the following tips for improving communication:

³¹ Ibid.

³² Bulleted points taken verbatim from: “Advocacy Guide,” Op. cit., p. 6.

³³ “Legislative Lobbying Manual.” North Carolina School Boards Association, January 2011, p. 11.

http://www.ncsba.org/clientuploads/DocumentsPDF/Advocacy/Legislative%20Lobbying%20Manual%2001_2011.pdf

³⁴ “Advocacy Guide,” Op. cit., p. 6.

³⁵ “Advocacy Resource Guide,” Op. cit., p. 24.

- Stress the fact that you are a constituent in the subject or first line.
- If your e-mail refers to a specific bill or amendment, identify it in the subject line (e.g., “Constituent Who Supports H.R. 1” or “Support Education Funding in the Budget Resolution”).
- Personalize the e-mail by including the name of your school district and explain how the policy will affect your community.
- State your opinion and your specific request within the first or second sentence.
- Avoid confusing education jargon.
- Demonstrate respect and courtesy, no matter what.
- Include your address; your elected official will want to know that you are a constituent.
- Provide links to one or two articles that relate to the issue.
- If you have any personal association with policymakers, remind them. Nothing is more effective in getting a policymaker’s attention.³⁶

More engaging than written communications, **telephone conversations** are more intimate and offer an opportunity for interaction. If the legislature is not in session, district leaders can call representatives at their local offices. If the legislature is in session and the bill is imminent, leaders can call officials at the capitol. In either case, advocates should be prepared to speak with the representative directly, but not be surprised if they are delegated to support staff.³⁷ Figure 2.1 presents three steps for effective telephone communication.

Figure 2.1: Steps for Advocating via Telephone

STEP	DESCRIPTION
Step 1: Preparation	Before you lift the receiver, jot down a few talking points. Be prepared to leave a voice mail message if necessary.
Step 2: Conversation	When you telephone a legislator’s office, ask to speak with the legislative aide responsible for covering education issues. If the aide is not available, leave a clear message, including your name and address, with the person who answers the phone. State the issue you are calling about and what you want your representative to do. Be as brief as possible, recognizing that legislative offices are very busy.
Step 3: Follow-up	Be sure to thank elected officials and their staff members for their time. A follow-up e-mail is a good opportunity to restate your position and include additional materials, such as links to a position statement or relevant articles. It also helps establish a relationship with the office.

Source: ASCD³⁸

³⁶ Bulleted points taken verbatim from: “Advocacy Guide,” Op. cit., p. 12.

³⁷ “Advocacy Resource Guide,” Op. cit., p. 29.

³⁸ Table contents adapted from: “Advocacy Guide,” Op. cit., p. 13.

Experts typically consider **face-to-face meetings** the most effective method for lobbying, whether it is at a public hearing or in a private meeting. Legislators respond to oral communication better than they do to reports or letters, partly because it enables them to put a face and name to the issue and ask questions. Experts suggest that attending local district offices between legislative sessions offers the best opportunity to meet government officials, mostly because they will be less busy than usual.³⁹ The following actions will help school board members maximize their site visits:

- If at all possible, make an appointment.
- It is usually best to visit the legislator with a small group.
- When meeting with a legislator in a small group, it is especially important that there is still one clear message.
- If you are a constituent, introduce yourself as such to the legislator.
- Let the legislator know immediately whom you represent.
- Be clear about your position and what you would like the legislator to do.
- Give the legislator a one-page written statement, or Fact Sheet, of your position on what the bill does and why he or she should support your position.
- Be firm in expressing your position.
- Always be calm and courteous when dealing with legislators, and never resort to harsh or personal remarks.⁴⁰

Position papers and policy briefs can be effective ways to concisely communicate the school district's stand on a particular issue and provide corresponding research-based evidence. Position papers can be created and disseminated independently of other advocacy methods, but are most commonly used in combination with face-to-face meetings where they can be left with decision makers to reaffirm the legislative request. ASCD explains that effective position papers:

- State your position up front.
- Clearly communicate what you want done.
- Provide the background and context of the education issue.
- Are no longer than two pages.
- Identify your group and why the position is important to you.⁴¹

Finally, providing **testimony** before a committee, public hearing, or legislative commission can be a powerfully effective method for influencing funding, laws, and regulation. Opportunities to provide testimony can be rare and brief, and are typically only offered to highly experienced advocates. Therefore, it is imperative for district leaders to make the

³⁹ "Advocacy Resource Guide," Op. cit., p. 30.

⁴⁰ Bulleted points taken verbatim from: Ibid., pp. 30-31.

⁴¹ Bulleted points taken verbatim from: "Advocacy Guide," Op. cit., p. 14.

most of the occasion. Effective testimony requires avid preparation, including mastery of the issue in order to successfully respond to challenging questions. ASCD recommends that testimony include the following elements:

- An introduction that expresses your interest in the issue.
- A brief definition of the issue.
- A statement and explanation of your position on the issue.
- Rationale for your position and recognition of alternatives.
- A request for support of your position.
- An offer to provide assistance and a thank-you.⁴²

It is perhaps self-evident that the most effective lobbying efforts use a combination of communication methods to influence education policy. School boards use written communication, telephone conversations, face-to-face meetings, position papers, and live testimony to champion school districts and the issues most pertinent to their well-being.

Figure 2.2: “Ten Commandments of Lobbying”

1. **Never lie or mislead a legislator** about the facts of an issue, its relative importance, the opposition's position or strength, or any other matter.
2. **Look for friends in unusual places.** In politics, a friend is someone who works with you on a particular issue, whether Democrat or Republican, liberal or conservative. A friend on one issue may oppose you on every other issue.
3. **Never cut off anybody from permanent contact.** Don't let a legislator (or another lobbyist) consider you a bitter enemy just because you disagree. Today's opponent may be tomorrow's ally.
4. **Don't grab credit.** What you and your group want from the process is public policy in line with your interests. Legislators and others may want the public credit. Let them have it. Nothing is impossible if it doesn't matter who gets the credit.
5. **Make your word your bond.** Don't make promises you aren't positive you can keep.
6. **Don't lobby opponents who are publicly committed to their position.** It wastes your time, and it alienates them further. It is more productive to support your allies and lobby legislators who claim to be keeping an open mind.
7. **Always notice and thank everyone who has helped you.** People like to be appreciated and it costs nothing to say, "Thanks!" A person who feels unappreciated will probably not help you again and may even go out of his or her way to hurt you.
8. **Don't gossip.** Knowing legislators' peculiarities and peccadilloes is one thing; talking about them is another. If you get the reputation of telling everything you know, you'll soon find that no one will tell you anything.
9. **Do your homework.** There is no excuse for not having the facts to support your case when you need them. It makes you look unprofessional and reduces your credibility.
10. **Be there.** You can know your opponent; you can develop imaginative and reasonable compromises; you can burn the midnight oil to digest all the arguments. But you have to be in the right place at the right time to win the day.

Figure: New York State School Boards Association⁴³

⁴² Bulleted points taken verbatim from: Ibid., p. 15.

⁴³ Figure contents taken verbatim from: “Advocacy Resource Guide,” Op. cit., p. 34.

Regardless of the type of communication employed to influence decision-makers, experts recommend a set of encompassing principles that should guide advocacy efforts. Figure 2.2 presents the “Ten Commandments of Lobbying” according to the New York State School Boards Association (NYSSBA), which encourage advocates to always be honest, open-minded, courteous, well-prepared, and reliable. Following the “Ten Commandments” not only facilitates results-oriented lobbying, but ensures that advocacy undertakings are well-intentioned and ultimately in the best interest of students, teachers, administrators, and all other community stakeholders.

In addition to citizen lobbyists, professional lobbyists play an important role in state and national policy making, and some school districts may pay lobbying organizations to advocate for them because they do not have time to do so themselves. However, while hiring professional lobbyists may seem like an attractive option, some districts have come under fire for expensive fees. At a June 2013 board meeting for the Gahanna-Jefferson Public School District in Ohio, a resident protested the \$3,500 annual fee, arguing that the benefits are not quantifiable. Board members countered by explaining they simply do not have time to lobby themselves and, moreover, professional lobbyists are sophisticated experts. In response to the assertion that the annual fees amount to 50 cents per student, one board member explained: “Not only do we not have time to go down to the Statehouse ourselves, but these people are the experts in who to talk to, how to talk to them...[t]hey know how to plead our cases. I think it's worth every 50 cents.”⁴⁴

As with community engagement, advocacy programs can use **media relations** to build support and strengthen their voice. NYSSBA suggests that school board members can use media relations in several ways, including press releases, letters to the editor, and press conferences. Experts explain that the media “are important resources for school board members to use to reach the citizens and legislators in their school districts with their message.”⁴⁵ School boards can use the media to publicize the needs of the district, mobilize public support, and raise public awareness of education issues.

⁴⁴ Bournea, C. “Board Defends Membership Fee for Lobbying Group.” *This Week Community News*, June 20, 2013. <http://www.thisweeknews.com/content/stories/gahanna/news/2013/06/19/3500-annually-board-defends-membership-fee-for-lobbying-group.html>

⁴⁵ “Advocacy Resource Guide,” Op. cit., p. 35.

PROFILE: MISSOURI SCHOOL BOARDS' ASSOCIATION

The Missouri School Boards' Association (MSBA) is a membership-based organization of school board members of Missouri's school districts. It serves as "the unified voice of school board members throughout the state" and offers its members access to legal services, policy assistance, school board training, financial and insurance programs, and other services.⁴⁶ A major aspect of MSBA's mission is to advocate for public education in Missouri, and it provides tools that enable its members to take an active role in education.

MSBA posts a daily blog on its website during Missouri's legislative session, distributes a newsletter to its members named the *Legislative Voice*, and develops a comprehensive platform that provides a positional framework for influencing legislation.⁴⁷ The platform includes belief statements on issues relevant to public education, including conditions of students, curriculum, governance, accountability, and other matters.⁴⁸ MSBA focuses on advocacy at the state and national level. The "Federal Advocacy" page on the MSBA includes tools for staying current on federal legislative issues, including links to government sites, instructions on how to identify relevant officials, and tips for writing members of United States Congress.⁴⁹

MSBA's School Board Advocacy Network (SBAN) provides opportunities for members of local school boards to meet with legislators during the General Assembly's session in Jefferson City.⁵⁰ MSBA members are invited to attend day-long sessions where MSBA staff members assist district leaders in advocating for educational issues. School board members begin the day by attending a briefing at the MSBA government relations office, where an experienced staff member instructs board members on effective practices and provides background materials, such as a map, hearing schedule, and educational policy papers. Next, school board members walk to the Capitol to meet with legislators or staffers. The visits "allow school officials to have a consistent presence at the Capitol during the legislative session." Before leaving, school board members can return to the MSBA office to recap the day's events and provide feedback on their experience.⁵¹

⁴⁶ "History." Missouri School Boards' Association. <http://www.msbanet.org/home/msba-history.html>

⁴⁷ "Missouri School Boards' Association. <http://www.msbanet.org/index.php>

⁴⁸ "MSBA Legislative Platform 2012-2013." Missouri School Boards' Association, June 15, 2012, pp. 1-3. http://www.msbanet.org/files/governmental_relations/MSBA%20Legislative%20Platform%202012.pdf

⁴⁹ "Federal Advocacy." Missouri School Boards' Association. <http://www.msbanet.org/governmental-relations/federal-advocacy.html>

⁵⁰ "School Board Advocacy Network." Missouri School Boards' Association. http://www.msbanet.org/files/governmental_relations/SBAN2013.pdf

⁵¹ Ibid.

APPENDIX A

Figure A: Sample Letter to a Legislator to Influence Legislation

Date
Your Name and Address

The Honorable _____
State Legislative Building
16 West Jones Street
Raleigh, NC 27601

Dear Representative (Senator):

I am a school board member from the county of _____ serving in my _____ term. On behalf of my county/city, I urge you to support SB____. This proposal would allocate \$ ____ million which _____ to be allocated to low wealth counties.

This proposal would be very beneficial (harmful) to my district because we have not been able to utilize the technology available in the classroom because of the lack of funding.

As a member of the House/Senate _____ Committee, please give this bill your full attention and consider the positive effects this bill could have to the school districts in your area. If you would like, I can provide you with additional information regarding our current school technology plan and budget, or I would be happy to meet with you to discuss these issues.

Thank you for your leadership in support of public education. Please let me know your position on this issue.

Sincerely,

Name
School Board Title

Source: North Carolina School Boards Association⁵²

⁵² Taken verbatim from: "Legislative Lobbying Manual" Op. cit., p. 17.

PROJECT EVALUATION FORM

Hanover Research is committed to providing a work product that meets or exceeds partner expectations. In keeping with that goal, we would like to hear your opinions regarding our reports. Feedback is critically important and serves as the strongest mechanism by which we tailor our research to your organization. When you have had a chance to evaluate this report, please take a moment to fill out the following questionnaire.

<http://www.hanoverresearch.com/evaluation/index.php>

CAVEAT

The publisher and authors have used their best efforts in preparing this brief. The publisher and authors make no representations or warranties with respect to the accuracy or completeness of the contents of this brief and specifically disclaim any implied warranties of fitness for a particular purpose. There are no warranties which extend beyond the descriptions contained in this paragraph. No warranty may be created or extended by representatives of Hanover Research or its marketing materials. The accuracy and completeness of the information provided herein and the opinions stated herein are not guaranteed or warranted to produce any particular results, and the advice and strategies contained herein may not be suitable for every partner. Neither the publisher nor the authors shall be liable for any loss of profit or any other commercial damages, including but not limited to special, incidental, consequential, or other damages. Moreover, Hanover Research is not engaged in rendering legal, accounting, or other professional services. Partners requiring such services are advised to consult an appropriate professional.



1750 H Street NW, 2nd Floor
Washington, DC 20006

P 202.756.2971 F 866.808.6585
www.hanoverresearch.com