

Policymaker Outreach

A Checklist for Regional Associations

This checklist can help you develop strategies to reach policymakers. It focuses on seven core questions to explore and includes reflections from regional association leaders.

1. What do we WANT from policymakers?

- What's our overall goal? What policymaker actions do we want to influence?
- How will we know if we're successful?
- Are the key players in our organization aligned with the goal?
- Are we looking to build relationships? Are we prepared for the persistence that requires?
- Is the timing right?
- Have we communicated or are we ready to communicate what we want?

"Setting a goal—getting the board and staff to define why we're doing the outreach—can be the hardest part."

"We want them to know who we are. We want them to return our phone calls. We want them to give us a seat at the table."

"It's difficult if you don't have specific asks of policymakers. That's the way they're used to working: what do you want from me?"

2. What RESEARCH do we need?

- Research *for* policymakers: How do we ensure our research ending up in right hands? What are our messaging, outreach, and advocacy strategies around the distribution of the findings?
- Research *about* policymakers: What information do we have about the people we're trying to reach?
- Research *from* policymakers: What information can we gather from them?

"If you're not careful about building a messaging and outreach strategy, you risk having your research disappear."

"We commissioned independent research on education in our state. The sides were so polarized we used it as the basis for engaging policymakers and it led to consensus recommendations that got adopted."

3. What can we DO for policymakers?

- How can we be useful to them, add value to their work, including and beyond the financial?
- How can we prepare them or their staff in advance?
- What does each party bring to the table?
- What do we think they expect?
- What pressures are they facing right now?
- What might they want from us?

"We constantly share the message that we—specifically our members—are a resource to policymakers."

"Watch for opportunities to be helpful and build a relationship."

4. How are we SEEN by policymakers?

- What is our level of perceived credibility?
- Who are we seen as representing?
- Are we seen as politically independent?
- Are we perceived as acting on our own? Should we be part of a coalition?
- What do they know about us? Do they know what foundations do?
- What do we think they might *not* know about us?
- How do we know if we have a good relationship?

“You need to decide when you’re playing the insider strategy or outsider strategy when you’re thinking about influence.”

“Making sure there isn’t a mismatch between how the official sees you and how you see yourself takes a lot of proactive relationship building and being open to some frank feedback.”

5. How can we INFLUENCE policymakers?

- What’s the best way to reach them?
- What role/s do we want to play—partner, resource, critic, convener, etc.?
- What relationships or connections can we leverage?
- Who do we represent?
- What are the politics?

“Sometimes influence isn’t so much about moving the policymaker to your position but making her realize it’s been her position all along—we’re just there to help her realize it. Paying attention to who she cares about, who she listens to, and what issues move her, and how they’re aligned with your goals, can be the key.”

“We’ve had success with folks who have been in agencies for some time—staff, more than elected or appointed officials.”

6. What do we SAY to policymakers?

- What are our key talking points? What’s the ask?
- How can we inform them about what foundations do? What roles are foundations playing today to help their constituents?
- Have we communicated—or are we ready to communicate—what we want?

“For our talking points, we never try to say more than three things.”

“We’re pounding away at the message that philanthropy can’t fill the gaps. You’d think that would be an easy message but it’s not.”

7. How should we PREPARE for a meeting with a specific policymaker?

- What is our goal for the meeting?
- What is our ask? Who should make the ask? When?
- What is the one thing we want this policymaker to remember?
- What can we offer (information, connections, research, etc.)?
- Do we know anyone who knows or can influence this policymaker?
- Whom should we bring to the meeting?
- After the meeting, what follow-up do we need to do?

“We’ve found that our members like regional association staff to make the ask.”

“Bring the person who will tell the strongest story. Who will be the best proponent for the message you want to deliver that day?”