Research to Policy Boot Camp

Policies For Action | March 6, 2019
Do facts matter?
Yes, facts still matter
Yes, facts still matter
The Democratization of Data
Storytelling
Facts don’t always change minds…but stories might

“Having the data on your side is not always enough. For better or for worse, emotions may be the key to changing minds.”

- Hidden Brain, March 2017
1. Know your audience

2. Prepare your evidence-based insights and takeaways
Audience and Products

The bigger the audience, the more accessible the product must be.

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Takeaways: What’s the one thing I hope people remember?

- How would you explain your research to your mom, your neighbor, or at a party?
- If you were writing the headline and lead paragraph for this story, what would it say?
- Is there a standout statistic that helps convey the significance of your findings?
- Why should I care? Why should they care?
A Day in the Life of a Washington Insider in 2018

Channels used for Washington News and Information Throughout the Workday

PERCENTAGE OF RESPONDENTS BY CHANNEL


© National Journal 2018
What to expect today

- Hear from policymakers and journalists
- Learn more about tools for digital outreach, data visualization, and media interviews
- Practice your evidence-based insights and takeaways
- Develop your own plan for policy impact
Digital Communications Strategy

Making quality connections in a digital world
A Day in the Life of a Washington Insider in 2018

Channels used for Washington News and Information Throughout the Workday

PERCENTAGE OF RESPONDENTS BY CHANNEL

© National Journal 2018
A New Morning
Targeting a continued challenge, greatest variation in consumption channels occurs in the AM hours

THE AVERAGE CAPITOL HILL STAFFER

- E-newsletters and social media on a mobile device
- Podcasts
- E-newsletters and websites on a computer

THE AVERAGE FEDERAL EXECUTIVE

- TV
- AM/FM radio

THE AVERAGE PRIVATE SECTOR PROFESSIONAL

- E-newsletters on a mobile device
- AM/FM radio

"Congressional staff – a largely millennial crowd – want access to everything on their mobile devices. Even in-depth information. Other workplaces, remain platform agnostic – for now."

– National Journal's Washington in the Information Age, 2018
Creating Digital Content
A Digital Communications Strategy

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Policy Briefs and Fact Sheets

Pros:

- Easier to digest (especially fact sheets)
- Audience focused
- Awesome leave behind

Cons:

- Generally not a digital product
- Not written for online audiences
- Not consumable on a mobile device
Why blog posts are better

- They are digitally native content that online audiences expect and can use
- Engage and educate a broader audiences including the media, lawmakers, or advocates
- Create community on your topic over a long period of time
Why is digital content different?

- Internet users scan first and read later
- Mobile users will scroll to the bottom and move back to the top
- People scan in an “F” pattern
- Average time on page is a little over two minutes
Blogging tactics

- Write in a way that’s different from a research publication
- Have one point per post
- Expand on your findings
- Preview your findings or talk about your research process
- Dive into one finding and make a policy recommendation
- Explain multiple findings and what they mean for the field
- Make it shareable
Examples of policy-focused blogs

- Policies for Action (*P4A Spark*)
- Marginal Revolution
- Greg Mankiw
- SCOTUSBlog
- Grits for Breakfast
- Health Affairs
Podcasts

“Podcasts appear to be a viable new information source. Particularly popular among mobile, ever-multitasking millennial insiders, podcasts reflect an opportunity to gain subject matter depth. Podcasts can provide the opportunity for a 30-minute deep dive on an issue, where many other methods can’t.”

– National Journal's Washington in the Information Age, 2018
Podcasts to consider

- Health Affairs podcasts
- The Healthcare Policy Podcast
- TEDTalks Health
- Vox’s “The Impact”
- Urban Institute’s “Critical Value”
- Brookings institution podcasts
Distributing Your Content
Using social media platforms for work in Washington

- LinkedIn: 48 percent
- Twitter: 40 percent
- Facebook: 33 percent

National Journal’s “Washington in the Information Age,” 2018
Twitter

“Twitter remains the most widely used platform for most activities.”

- Discover News and Information: 76 percent
- Monitor Conversations and Trends: 71 percent
- Discover others’ opinions or perspectives: 64 percent

National Journal’s “Washington in the Information Age,” 2018
LinkedIn

- Build my own brand in Washington: 43 percent
- Monitor conversations and trends: 35 percent
- Build my organization’s brand in Washington: 34 percent

*National Journal’s “Washington in the Information Age,” 2018*
Using Facebook to share and monitor conversations has fallen considerably over the last several years.

“I use Facebook to share information with friends, not colleagues, and Twitter exclusively for work to amplify or comment on news I think is important or interesting.”

*National Journal’s “Washington in the Information Age,” 2018*
Social media use is strong inside the beltway, but trust is eroding

“Social Media is an important part of my work:”

- 2017: 51 percent
- 2018: 30 percent

National Journal’s “Washington in the Information Age,” 2018
Social media use is strong inside the beltway, but trust is eroding

“Social media will be important to my job in the next 1-2 years:”

- 2017: 50 percent
- 2018: 26 percent

National Journal’s “Washington in the Information Age,” 2018
Twitter

- Real-time information network
- Users post 280-character updates, or “tweets”
- Not just text: Links, images, videos, and more.
LinkedIn

- A professional place to develop content
- Share blog-length posts and ideas
- Share your work and connect with colleagues.
Facebook is not a professional network
What is Twitter good for?

- Connecting with reporters, peers, and other influencers
- Keeping up with news and info from your field
- Positioning yourself as a curator of interesting, relevant content and analysis
- Connecting with colleagues
- Promoting your own content
- Search engine optimization
Connecting with journalists and peers

Joshua Holland @JoshuaHol · Mar 8
All 12 states mentioned in this piece are governed by Republicans. Is it really that they can’t adequately fund their social services, or refuse to because of their ideological priors?

Richard C. Auxier @richardcauxier
After reading @dylanmatt analysis of the “heartland” study, worth considering @urbaninstitute report on state fiscal capacity. In short: poorer states need more services but they can’t adequately fund them b/c they’re poor. vox.com/2018/3/6/17099...
Show this thread

Richard C. Auxier @richardcauxier · Mar 8
Policy decisions obviously play a huge role in outcomes. But the @urbaninstitute study is about “relative” resources & needs. Massachusetts has a lot of resources & little need. Mississippi is the opposite. If they made same policy choices. MA could do more.

Joshua Holland @JoshuaHol
Replying to @richardcauxier @urbaninstitute
Thanks.
2:51 PM · 8 Mar 2018
Connecting with influencers

I'm not sure that I ever suggested that the racial wealth gap was esoteric. I did, tho, suggest that it's not being discussed in public as it should. Either way, I love this analysis:

Nine Charts about Wealth Inequality in America (Updated)
These nine charts illustrate what's behind growing wealth disparities, particularly the racial wealth gap, in America.
apps.urban.org

3:09 PM - 5 Mar 2018

5 Retweets 15 Likes

This is some of the clearest evidence we have yet that Republicans' politically-motivated health care sabotage is driving up health care costs for families. urban.org/research/publi

4:52 PM - 26 Feb 2018

74 Retweets 111 Likes

0 74 111
Connecting with the media

Black homeownership is as low as it was when housing discrimination was legal

By Michelle Singletary  April 5  Email the author

I was scrolling through my Twitter feed and was stopped cold by a tweet about black homeownership rates.

The tweet said the gains made since the passage of the Fair Housing Act in 1968 have all been erased.

That tweet took me to a blog post by Margery Austin Turner, senior vice president for program planning and management at the Urban Institute. She was putting into perspective how far we’ve come in housing discrimination in 50 years.
Search engine optimization

Matthew Chingos | Biography | Urban Institute
https://www.urban.org/author/matthew-chingos
Matthew M. Chingos is director of the Urban Institute’s Education Policy Program, which undertakes policy-relevant research on issues from prekindergarten through postsecondary education. Current research projects examine universal prekindergarten programs, school choice...

Matt Chingos (@chingos) | Twitter
https://twitter.com/MattChingos/status/1307021451168872960
The latest Tweets from Matt Chingos (@chingos), Director of Urban Institute’s Education Policy Program. DCPS parent. Author of GAME OF LOANS...

Matt Chingos - Brookings Institution
https://www.brookings.edu/experts/matthew-m-chingos/
Matthew M. Chingos is director of the Urban Institute’s Education Policy Program, which undertakes policy-relevant research on issues from prekindergarten...

Matt Chingos - SUNY
https://www.suny.edu/sunycon/2016/speakers/matt-chingos/
Matt Chingos is a Senior Fellow at the Urban Institute, where he studies a wide range of education-related topics at both the...

Jon Schwabish (@jonschwabish) - Twitter
https://twitter.com/jonschwabish
I’m super proud to support TheOpenvizcon Diversity Scholarship again this year. I’m fortunate enough to be able to do this, so I want to give my thanks to everyone for helping to support my work.
4 hours ago Twitter

Home - Policy Viz
https://policyviz.com/

About - Policy Viz
https://policyviz.com/about/
In graduate school, I wasn’t taught how to code or how to be a good writer, how to present my research, or how to make better graphs. School was for learning...

Jonathan Schwabish | Biography | Urban Institute
https://www.urban.org/author/jonathan-schwabish
Jonathan Schwabish is a senior fellow in the Income and Benefits Policy Center at the Urban Institute.
How to be good at Twitter

- Maintain a voice and identity
- Be a source of ideas, a curator of content, good original concepts, humor, and expertise in your field
- Hone your insights, your ideas, your narrative, the things you’re known for
- Be thoughtful about who you follow and how you position yourself and participate in the dialogue
Policy Twitter All-Stars

- Harold Pollack (@haroldpollack)
- Damon Jones (@Nomadj1s)
- Stephanie Kelton (@StephanieKelton)
- Matt Chingos (@Chingos)
- Nicole Barbaro (@NicoleBarbaro)
- Matthew Martin (@Hyperplanes)
Newsletters: Everything old is new again

- Delivers content consistently and directly to your audience
- You know it’s being seen (even if it’s not opened)
- Creates a more personal connection
- Subscribers are opt-in
- Can create discipline and consistent schedules
- Provides freedom to write what you want
Newsletter Platforms

- TinyLetter
- MailChimp
- Revue
- Substack
Writing a personal newsletter

- Concentrate on text and not design
- Link to your content and interesting content from around the web
- Personal tone
- Consistent theme/format and schedule
Tying it all together

- Create digital content based on your research
- When possible, think mobile first (a .PDF is not digital content)
- Distribute that content to a targeted audience through multiple, but select, digital channels
- Only use the tools you enjoy using
- Quality connections over quantity of connections
Principles of Data Visualization

Why to visualize, and how to do it well
Why Visualize?
Mean of x: 9          Correlation coeff: 0.816
Variance of x: 11     Linear regression: y = 3.00 + 0.500x

Mean of y: 7.50
Variance of y: 4.12
Measles

Vaccine introduced


0k 1k 2k 3k 4k

Alaska
Ark.
Calif.
Conn.
Del.
Ga.
Iowa
Ill.
Kan.
La.
Md.
Mich.
Mo.
Mont.
N.D.
N.H.
N.M.
N.Y.
Okla.
Pa.
S.C.
Tenn.
Utah
Vt.
Wis.
Wyo.
Visual Perception
The relative merits of circles and bars for representing component parts. Walter Crosby Eells, 1926.
Visual Hierarchy
The use or misuse of three-dimensional graphs to represent lower-dimensional data. Michael Siegrist, 1996.
Contents of Ben's fridge

- Apples: 10
- Oranges: 15
- Bananas: 18
Preattentive properties

- Form
- Color
- Spatial position
- Movement
This is the Title of the Chart and it Should be Short

This is a subtitle that's in sentence case

Y Axis Title (unit)

Label

X Axis Title

Source: Lorem ipsum dolor sit amet, metus mi mauris vulputate morbi feugiat.

Notes: Lorem ipsum dolor sit amet, metus mi mauris vulputate morbi feugiat. Nec dignissim dui parturient et est. Orci ullricies lectus vivamus eius diam, massa non suspendisse nibh ullamcorper, lacus tortor libero luctus risus ligula, tortor fringilla fermentum lacinia sollicitudin.

Urban Tagline

Lato Black

8 pt

Uppercase

'Urban' is blue; RGB: 22 150 210 or #169E62;

'Institute' is black; RGB: 0 0 0 or #000

Letter spacing is expanded by 1px

Place in the bottom-right corner of figure
House Prices  (percent change year over year)
House Prices (percent change year over year)

National house prices increased 6.3 percent from the third quarter of 2017 to the third quarter of 2018.

REGION/STATE
Montana
US average: 6.3%

CHANGE 5.6%  QUARTER Third  YEAR 2018

Source: Federal Housing Finance Agency.
Fruit tax

AK

WI

WA  ID  MT  ND  MN  IL  MI  NY  MA  OR  NV  WY  SD  IA  IN  OH  PA  NJ  CT  RI

CA  UT  CO  NE  MO  KY  WV  VA  MD  DE

AZ  NM  KS  AR  TN  NC  SC  DC

OK  LA  MS  AL  GA

HI  TX

FL

VT  NH

ME

URBAN INSTITUTE
Percent of map area covered

- Tile grid map
- State map

No fruit tax:
- 24%
- 8%

Fruit tax:
- 76%
- 92%
References and image sources

- The relative merits of circles and bars for representing component parts. Walter Crosby Eells, 1926.
- The use or misuse of three-dimensional graphs to represent lower-dimensional data. Michael Siegrist, 1996.
- Battling Infectious Diseases in the 20th Century: The Impact of Vaccines, WSJ.com
- Urban Institute Data Visualization Style Guide
- US GDP split in half, originally posted to reddit.com
- US population map
- Urban Institute’s State Economic Monitor
Audience Outreach Strategy
Who is my Audience?
Conceptualize
Developing your audience

Narrow your focus
Think about ROI
Review the US Policymaker landscape

Federal
- President
- Congress
- Elected
- Agency Heads
- Appointed
- Staff
- 1

State
- Governor
- Legislature
- Associations
- Agency Heads
- Staff
- 50

Local
- Mayor
- County Executive
- City Council, County Council
- Appointed
- Practitioner
- Staff
- 19,000+
- 3100+
Meet your audience where they are.
Solutions-oriented
- Impact on people’s lives
- Relate to stated priorities

Needs to be realistic
- Budget impact
- Implementation details

- Media
- Blogs
- Social media
Play the long game.
Recap

- Conceptualize your audience
- Narrow your focus
- Meet your audience where they are
- Play the long game
Putting It All Together

Designing Your Plan for Policy Impact
In this section:

- We’ll go through the steps of putting together an overarching strategy to disseminate your research in the most impactful ways.

- **Exercise:** Build a custom outreach plan for your own project.
Policy Impact Plan

POLICY IMPACT PLAN TEMPLATE

Plan for

Goal

Identify your key audiences. Who might benefit from learning about your project?

Audience A

Audience B

Audience C

What do you want them to do? What actions might they take after learning about your project?

Plan your time. What's the timing for your outreach? Are there key events to keep in mind? Are you working toward a specific deadline?

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List your channels and tactics. How can you reach your audiences?

Audience A:

Audience B:

Audience C:

Write your key messages. What is your headline message that will make your audience sit up and take notice? What new, different, surprising, or challenging expectations? Why does this project matter?

Prepare your messengers. Are there validators, thought leaders, influencers, etc. who can help you carry your message? Are there materials that you need to create to help share your message?

- Fact sheet
- Written testimony
- Policy brief
- Other:

Tweet
- Media pitch
- Elevator pitch
- LinkedIn post/blog
- Blog post
- Facebook message

Evaluate. How will you know whether your plan was successful? How will you measure outputs and outcomes?


Where to begin?
Start with a goal.
What are you trying to achieve?

- Inform the federal debate on health care reform.
- Position yourself as an expert commentator on climate change and public health.
- Expand the use of the Low-Income Housing Tax Credit to create healthy affordable housing

Achievable and measurable.
Identify your audience. Think about what you want them to do.
GOAL: Expand the use of the Low-Income Housing Tax Credit to create healthy affordable housing

- **Audience A:** State housing policymakers (e.g. National Council of State Housing Agencies)
- **Audience B:** Mission-driven affordable housing developers and architects who work on LIHTC projects
- **Audience C:** Green building (e.g. USGBC) and healthy building certifying (e.g. Fitwel) organizations
What do you want them to do?

- **Audience A:** State housing policymakers  
  
  **Action:** Increase the use of health-related criteria in the tax credit award process

- **Audience B:** Affordable housing developers and architects  
  
  **Action:** Submit projects for tax credit applications that overtly prioritize health.

- **Audience C:** Green building and healthy building certifying orgs  
  
  **Action:** Reinforce their design and construction criteria with a greater focus on enhancing occupant health
Plan your timeline.
When will your audience be thinking and talking about this issue?

**Plan your time:** What’s the timing for your outreach? Are there key events to keep in mind? Are you working toward a specific deadline?

Sample Gantt chart:

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Choose your channels and tactics.
## What are the best ways to reach your audience?

<table>
<thead>
<tr>
<th>Audience A</th>
<th>State Housing Policymakers</th>
<th>Webinar for members and affiliate members of the National Council of State Housing Agencies (NCSHA)</th>
<th>Peer-reviewed article in <em>Housing Policy Debate</em>, <em>Journal of Urban Affairs</em>, or <em>Journal of Housing and Community Development</em></th>
<th>News release for Affordable Housing News and/or <em>Urban Land Magazine</em></th>
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<tr>
<td>Audience B</td>
<td>Affordable Housing Developers and Architects</td>
<td>Webinar with Urban Land Institute</td>
<td>Peer-reviewed presentation at Greenbuild</td>
<td>News release for Affordable Housing News and/or <em>Urban Land Magazine</em></td>
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<tr>
<td>Audience C</td>
<td>Green building organizations</td>
<td>Direct email to leaders of top three green building organizations</td>
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<td>News release for Affordable Housing News and/or <em>Urban Land Magazine</em></td>
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Write your key messages.
What’s the big deal?

- What’s the big picture? What’s at stake and why does this project matter?

- For legislators: What are the policy implications or recommendations? How does your effort affect their constituents?

- For news media: What are you saying that’s new, different or challenges expectations?
Prepare your messengers.
Who can help you spread your messages? Make it easy for them.

Are there materials you need to create?

- Fact sheet
- Written testimony
- Policy brief
- Other: Infographic
- Media pitch
- Elevator pitch
- Blog post
- Tweet
- LinkedIn post/blog
- Facebook message
Evaluate.
How will you know if you were successful?

- Webinar: number of attendees, post-webinar evaluation
- Blog post: number of pageviews, traffic sources
- Media outreach: number of stories, quality of coverage (quotes, citations)
- Journal article: number of pageviews, downloads
- Email outreach: open rate, responses
Exercise (15 Minutes)

- Use the worksheet to write down your plan for policy impact.