



ADVOCACY

101

HOW TO INFLUENCE  
POLITICAL OUTCOMES



## THE PLAN FOR TODAY

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First Step – Gathering information

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Second Step – Understand who can impact the change you want

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Third Step – Making contact with representatives

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Fourth Step – What to expect

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Fifth Step – After action

## KNOW YOUR STUFF



### **Most people start in one of two spots:**

A problem that have observed

An opportunity to improve a system or situation



### **But it is not enough to observe**

You must thoroughly understand your area of expertise and be able to articulate it clearly

You must come with solutions that officials can act on

# DO YOUR HOMEWORK

- Be prepared to be conversant and succinct on your topic. Prepare. Prepare. Prepare.
  - Sources to consider for Financial Aid topics
    - NASFAA Desk Reference (NASFAA.org)
    - AskRegs
    - TICAS (Student Loans)
    - Lumina Foundation
    - American Council on Education
    - Chronical of Higher Education
    - National Community College Association
    - The FSA Handbook
  - Case studies and personal stories of people impacted can be more compelling than stats and data.





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## WHO CAN IMPACT THE CHANGE

- Statute – Federal (Congress) these laws usually begin with HEA
- Regulation – Federal (Department of Education) these are rules implemented by ED
- Statute – State (Oregon State Legislature) these are going start with ORS
- Regulation – State (HECC/OSAC) these are the Oregon regulations around state programs
- Sub-regulatory guidance – (ED/HECC) this is the interpretation of regulations and statutes
- Institutional policies – Is the issue based on how your school interprets a rule?

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# WHO ARE YOU REPRESENTING

- Some folks just represent themselves
- Most people have some organization(s) they are affiliated with.  
Make sure they agree with your position before you continue.
  - Is it your school? Check with your government relations office.
  - Is it an organization like OASFAA or OCCA? Make sure they are in the loop!
  - Is it financial aid professionals in general?
  - Is a student organization or group of students?

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# MAKING CONTACT

- There are many different modes for reaching out...some are better than others
  - **Form letter writing or post card campaigns** – these are usually ignored by offices
  - **Public demonstrations** – often gimmicky, and *can* raise awareness, but it is more about the demonstrator than the issue.
  - Phone calls **during regular business hours**. Great for influencing votes on pending legislation. Don't leave a message.
  - **Individual letters** – these are good for addressing specific issues impacting one person or a few people
  - **Direct lobbying** – meeting with your elected official to raise an issue and propose a solution
  - **Public testimony** – can be very powerful especially for experts. Just know what kind of testimony you're giving
    - Hearing – exploratory to understand an issue
    - Public comment – giving information after a bill has been proposed
    - Effectiveness/impact inquest – analyzing the impact of a bill after it has been enacted into law

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## KNOW YOUR AUDIENCE



**You've got your issue, know your topic, and figured who to talk to and how!**



**Don't go fishing in unfriendly waters, unless you have to**



**Find elected members whose priorities align with yours**



**Ideally members who represent you or you have some connection to**



**Contact your officials' and ask for a meeting. It is a good idea to schedule more than one member at time, if possible.**

<https://www.congress.gov/members/find-your-member>

<https://www.oregonlegislature.gov/FindYourLegislator/leg-search.html>



## KNOW YOUR AUDIENCE CON'T

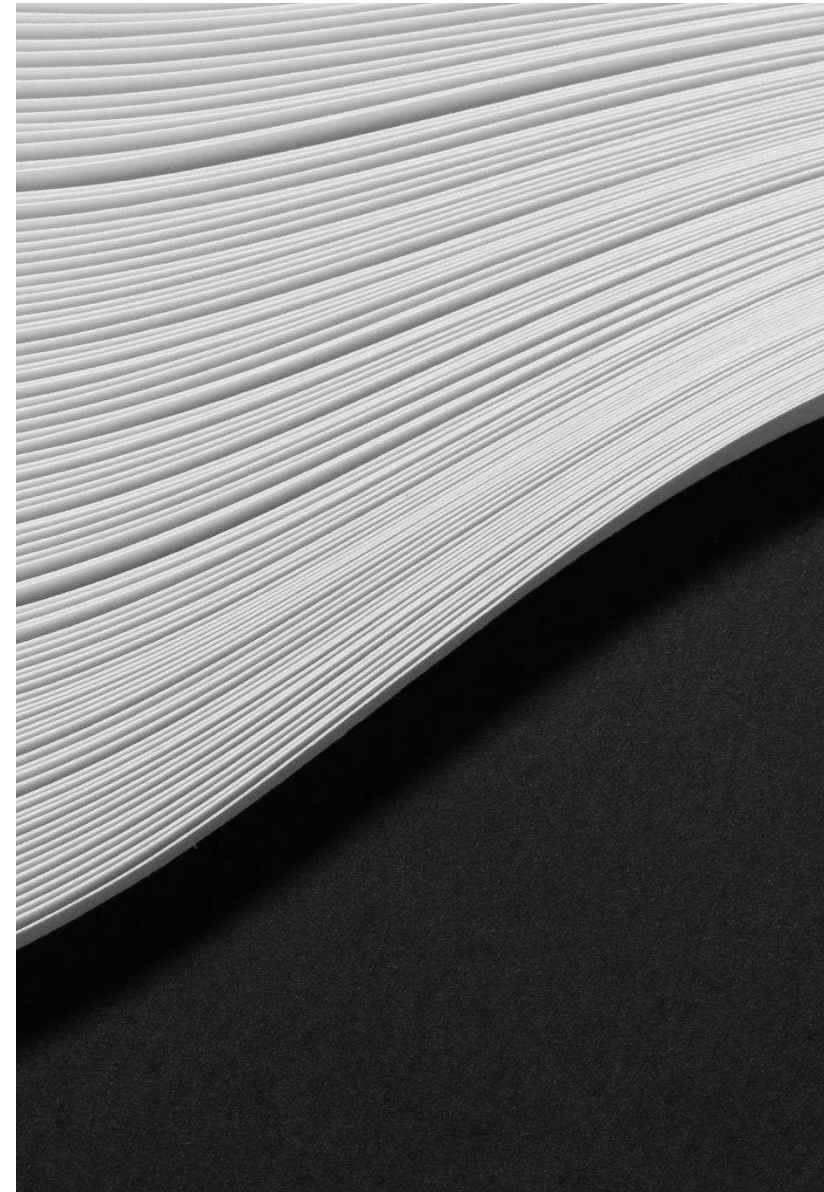
- Elected officials are expected to be experts on everything...but they are usually not. Don't assume they know what you are talking about.
- They need information from lobbyists and activists to make legislation.
- Know more about the office you are contacting
  - Are they right-leaning? Talk about jobs and workforce development.
  - Are they left-leaning? Discuss opportunity, social mobility and public goods.
  - Are they educators? Talk about the importance of the mission of higher education
  - Are they business-focused? Discuss the economic impact of higher education.
  - Are they military? Talk about the intersection of higher education and the military
- Tailor your message to meet the interests of the office you are talking to



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## PREPARING FOR CONTACT

- Have your documentation and references ready!
- The ubiquitous one-pager
  - One single-sided piece of paper with regular margins, 12 point per issue or topic.
  - Summarize the problem
  - Cite reputable sources with full URLs
  - Be clear and concise
  - Use bullet points
  - Avoid long dense paragraphs
- Bring any kind of resources on the topic you think will be useful. Knowledge is the coin of the realm.
  - This could be an annotated bibliography
  - It could be an infographic
  - It could be bills proposed by other members or other states
  - It needs to accurate and verifiable information





## MAKING CONTACT - LETTERS

- Letters that are personal, clear, and concise *can be* compelling
- These tend to be best for specific problems for specific constituents
- Form letters, post cards, and letter writing campaigns that use templates don't work
  - These are designed to impress based on numbers, but it is easy to see that very little effort went into the campaign
- Be patient!
  - Letters take time to respond to.
  - Research and responses to people who write take a lot of time, but it doesn't mean you have been forgotten
- Do include your research, talking points, and one-pager if you've made one.

A background image showing a group of people in a meeting or hearing. Many of their hands are raised, suggesting an active discussion or a vote-taking process. The image is dimly lit and has a dark, muted color palette.

## MAKING CONTACT - HEARING

- This is testimony and you will be on record.
  - Be accurate and concise
  - It's okay to be nervous, but stay focused
  - Be prepared to answer questions
  - If you don't know the answer, offer to follow up with them afterward
- If you are giving testimony the room might not be full
  - Members are very busy people and will pop in and out of meetings
  - Don't be discouraged the people who count will hear you
  - Your information will be read into the record for consideration

## MAKING CONTACT – MEETING AN OFFICE

- If you are meeting with an office
  - You will likely meet with a staffer
  - You will likely only get 10-15 minutes (sometimes more, but don't bet on it)
  - Bring a business card – these are almost always used to announce your arrival
  - Dress formally, and conservatively.
  - Be prepared with your talking points, one pager, and resources
    - Do not wing it! Time is very precious and you will be dismissed if you seem disorganized or unprepared.
    - If you are asked a question and you don't the answer say, "Let me get back to on that topic" and ask for contact information.
  - Be polite, even if they are not.
  - Try to get through your problem and solution in under 10 minutes to leave time for questions and follow-up.





## THE FINAL OFFER

- If possible, you want to establish and maintain a relationship. This is how the work is really done.
  - Offer to be a resource for their office, panel, committee or other group!
  - Offer to provide research
  - Offer to run a surveys or access to student opinions
  - Offer to be a sounding board for policy ideas
  - You want the engagement to persist beyond your meeting
  - Being an expert on a subject that can provide reliable, timely information is the coin of the realm!!
- Collect a card from them as you leave.



## THE AFTER ACTION

- After your meeting, follow up with the member via email
  - Be sure to remind them who you are and thank them for their time
  - Provide any requested follow-up information
  - Offer any assistance on your topic, as you are the expert
- Debrief
  - The most effective advocacy happens in teams of people
  - Make sure you meet and discuss your experience with the rest of the team.
  - Which ideas resonated with which members?
  - How can we refine our message?
  - What did they want to talk about? Is there an opportunity for further engagement on different topics?
  - Was our information compelling?

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## AFTER ACTION CON'T

- One-off advocacy is unlikely to lead to new legislation, though sometimes it can.
- It requires persistence, partnership, and patience
- After you debrief, start looking for your next round of advocacy.
  - Maybe it is phone call campaign
  - Maybe you schedule a zoom call with your organization
  - Perhaps it is writing a report on your topic that is a longer treatment of the topic
  - It could be language for a proposed bill

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## OTHER THINGS TO CONSIDER

- Finding Allies and Advocates
  - The Higher Education Space is full of other organizations to partner with
  - Make friends and share research and legislative concepts
- *Perceived* effort and preparation increase your credibility
  - Polished and prepared will only improve your effectiveness
- Bring a buddy
  - Brining someone from a different sector or state can strengthen your position and improve your outcomes
- Do not get discouraged if nothing happens
  - Legislative change is dynamic and unpredictable.
  - Persistence is critical – reform is hard
- Hit multiple offices and committees with the same message and argument
  - This will amplify your message



## QUESTIONS

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