Seizing the Opportunity

How Education Advocacy Groups and State Policy Makers Work Together to Advance Reform

January 2012
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Foreword

In fall 2011, Policy Innovators in Education (PIE) Network commissioned Education First to gather insights about the growing reform advocacy movement. The goal was to examine state-level advances in education reform over these past two years of rapid and bold policy change and to offer insights about the role advocates played as external champions for reform. This report documents the essential contributions of these advocacy organizations, and it details how these groups prodded and supported policy makers who successfully challenged the status quo in their states.

About Education First
Education First is a national education policy and strategic consulting firm that specializes in helping education policy makers, advocates and funders develop broad-based improvement and reform strategies that lead to greater learning and achievement for our nation’s students. Its team includes former governors’ advisors, state education agency leaders, advocacy organization CEOs, grantmakers, educators and reporters. The firm specializes in developing bold policies, planning for implementation and building widespread, bipartisan support and understanding for change.

Team members Adam Petkun, William Porter, Anand Vaishnav and Jennifer Vranek conducted the interviews with advocacy leaders and co-wrote this report.

www.educationfirstconsulting.com

About the PIE Network
The mission of the Policy Innovators in Education (PIE) Network is to build, support and promote a network of education advocacy organizations working to improve K-12 education in their states, so that every student graduates world-ready. The network connects and supports 34 member groups in 23 states and the District of Columbia. Collectively, our members regularly reach more than 300,000 voters who care about reform. PIE Network members are nonpartisan in ideas and bipartisan in approach, providing a consistent, evidence-based, and credible public voice in the process of education policy-making. The PIE Network enjoys the generous support of the Bill & Melinda Gates Foundation, The Walton Family Foundation, The Joyce Foundation, Stuart Foundation, and The Eli and Edythe Broad Foundation. PIE Network Executive Director Suzanne Tacheny Kubach and Communications Director Karen Frankola both helped shape the findings in this report, and Frankola assisted with the editing.

www.pie-network.org

Acknowledgements
The paper’s findings are based on interviews with advocacy leaders in 11 states, as well as Education First’s direct experience working in many of the states and with many of the advocates referenced in this study. In addition, we consulted a number of other reports on education advocacy efforts, including:

- “Rabble Rousers Revisited” edited by Suzanne Tacheny Kubach (Policy Innovators in Education Network, 2010)

We wish to thank the many leaders of PIE Network member groups who generously provided their time for interviews with Education First and spoke candidly about their accomplishments and challenges. We also appreciate the time and input from network members during the network’s meeting of executives in September 2011, where these findings were previewed and refined.
Introduction and Research Goals

From new policies on teacher evaluation and tenure to expanding high-quality school choices to protecting and improving school accountability systems, the past two years have been remarkable and productive ones for education reformers. The federal Race to the Top competition ignited enthusiasm in many states that outlived the program’s deadlines, while bleak fiscal realities that forced fresh approaches to business-as-usual motivated others.

But, digging deeper, some states made more headway than others; some were better able to leverage these opportunities for real wins and legislative accomplishments than others. The states that enacted break-the-mold ideas are states that had the commitment and leadership of inside-the-system champions, such as a strong education governor or a cabal of reform-minded policy makers in the legislature. By inside champions, we mean elected or appointed state leaders who have the authority and ability to lend the needed energy, leadership and political capital to enact significant policy changes.

Take Tennessee: In addition to building support for a bold set of reforms designed to position the state to win federal Race to the Top funds in early 2010, then-Governor Phil Bredesen engaged the Tennessee Education Association, winning support for the package. Or consider Indiana, where Governor Mitch Daniels and State Superintendent Tony Bennett drove “Putting Students First,” a groundbreaking education agenda, through the 2011 legislature. Even if supportive governors aren’t always in the driver’s seat, they help in others ways: Massachusetts Governor Deval Patrick’s office helped broker solutions and compromises between constituencies to pave the way for the state’s 2010 Achievement Gap Act.

In other states, however, the leadership remained mixed, progress was tentative and opportunities were missed. In these states, some inside champions were dedicated to reform while others were not, and those who were committed didn’t hold leadership positions required to influence political forces and institutional inertia. Or, in too many states still, policy makers were not focused on education because they had other priorities, or because they remained comfortable with the status quo.

Digging even deeper, in nearly every state that enacted significant new policies over the past two years, one also finds key external players working diligently to support the inside-the-system champions through a strategic combination of pressure and reinforcement. These strategies are led by education reform advocacy organizations working relentlessly to help build public demand for change, marshal evidence and ideas to help policy makers craft sound policies, and guide proposals through the political process.

To better understand the unique role education advocacy groups played in reform-leading states, this paper documents a set of best practices used both to create and take advantage of opportunities for bolder policy making. What roles did they play in the policy making process? In what ways did they contribute to building the political climate in their states that helped empower and encourage elected leaders to be bolder than before? How did these groups capture and expand the opportunities presented by Race to the Top funding or the extraordinary pressures to cut state funding?

In developing the findings of this report, we benefited from the generous insights of PIE Network members in states that enacted significant education policies within the last two years:

- Colorado
- Delaware
- Illinois
- Indiana
- Massachusetts
- Ohio
- Oklahoma
- Oregon
- Rhode Island
- Tennessee
- Texas
Even in states primed for reform, there is an important role for education advocacy organizations because policy making is:

- Chaotic – perfect consensus even among reform-minded policy makers rarely happens
- Cyclical – windows of opportunity open at different times from different political events
- Conflict-ridden – disagreements are inevitable and essential
- Relationship-driven – friends or enemies should never be permanent

In other words, because policy making is difficult, even talented and influential inside champions need support to navigate the path to reform.

We narrowed our sights to 11 states with strong, reform-minded policy makers in key leadership roles—places as diverse as Oregon, Illinois, Texas, and Rhode Island. We talked with advocacy leaders about their strategies, insights and advice for winning controversial changes and we reviewed other reports documenting their efforts. From this research, we worked to identify common approaches for how their organizations supported and accelerated the momentum for change or kept bad legislation from being passed.

Broadly, we found that when the values and concerns of the civic community voiced by advocacy organizations align with the priorities of inside champions, there is strong opportunity for action—and, with careful, continued work, great things can happen. The advocates we interviewed are all focused on long-term campaigns for cultivating policy change and creating the conditions where champions are rewarded for doing the right thing to improve schools. That’s because supportive governors and key legislators can set the agenda and break through intransigence and gridlock, and their leadership, in partnership with boots-on-the-ground support from advocacy organizations, creates the most promising environment for change. When there is a lack of political leadership, it’s much harder for any advocate to get traction and much harder for any state to make needed changes in education policies that will upset the status quo.

As one advocacy organization leader put it, “It’s not all about the unions, but in strong union states, when you have a governor that for whatever reason is less concerned about how the teacher union feels about him, that situation allows lots of stuff to be put on the table. And a governor who is interested in pleasing the teachers union takes a lot of stuff off the table.”
Advocacy Groups in the Political Ecosystem
Successfully Navigating a Complex Policy Environment

Policy making occurs in different stages and, in each, even the strongest inside champions need the support of external advocates. Those stages are described briefly below, with some of the ways effective advocates lend support to policy makers championing reforms highlighted:

1. Effective policymaking begins by building public will to solve some problem or concern. If the public is not fully aware of an issue’s causes and consequences, an advocate’s role is educational. When strong public concern is already evident, advocates mobilize citizens to engage directly with policy makers to make their concerns heard.

2. Next, effort shifts to forging agreement among different stakeholders about potential solutions. Most seasoned policy makers understand that perfect consensus is an elusive goal and so they aim instead to find central agreement among leaders of different constituencies in their states. Great advocates know their voice is just one among many seeking influence over the policy process and therefore negotiate for what’s most essential.

3. Proposed solutions must then be introduced as law, policy or regulation. Lawmaking always invites more tinkering with the specifics of a plan in order to attract needed votes, so advocates monitor changes at each stage of the legislative process. They use position statements, legislative testimony and other formal communication opportunities to ensure that the eventual law or policy remains reasonably consistent with the initial agreement.

4. In most cases, legislation creates broad directives while delegating implementation details to the purview of state boards and education agencies. Strong reform laws can be watered down in the implementation phase of policy making through overly permissive regulations and rulemaking, resource allocation formulas, or other details that ultimately shape how those reforms play out. Advocates are vigilant in this phase and weigh in using many of the same activities they used to help enact the original policy, including public testimony, involvement in committee deliberations and even lobbying of rule-makers.

5. Once progress is underway and policy begins to impact schools and their communities, great advocates continue their work by sustaining and defending the policies they’ve championed. They can help keep reforms on track by managing expectations as changes are introduced, highlighting successes and troubleshooting glitches, and continuing to support policy makers and agency leaders as they encounter resistance.
In our interviews with advocates, we heard common stories and learned about common strategies used as advocates navigated the different stages of policy making. We identified six strategies used by great advocates and offer examples of how those efforts recently helped to advance reform policy in several states. They include:

1. Creating urgency for action, now
2. Building and maintaining strong relationships with policy champions and leaders
3. Negotiating skillfully
4. Recruiting the broadest coalition
5. Agitating to keep the pressure on
6. Setting the stage for future successes

While we discuss these ideas separately below, we observed in practice that these strategies are mastered and employed together, not independently. They are more like spokes on a wheel than arrows in a quiver.

### #1: Creating Urgency for Action, Now

Across the nation, too many students aren’t getting the education they need to succeed in college or the workplace. This isn’t news to reform advocates, but the status quo remains too often unchallenged because this issue isn’t always salient in the public mind. In states enacting new reforms, we saw that education advocacy organizations had marshaled facts and data about the quality of public education—to build pressure and momentum for change and to encourage policy makers to try new solutions. These activities took shape in a variety of ways, from major research studies that served as calls to action to state report cards that became a steady drumbeat for change to other activities that generated earned media and attention from key community leaders.

In the early stages of building public will, there’s no stronger combination than credible data backed by clear analysis and compelling stories. Objective data lends credibility to specific reform choices and helps shift the conversation away from purely political considerations, providing neutral information that shows where education systems need to be improved. For example, the Texas Institute for Education Reform effectively used data to help legislators understand that too few students in their district are graduating ready for college or a career, despite the cheery appearance of gleaming hallways and bustling football fields they may see when they visit their local schools.

Linda Noonan of the Massachusetts Business Alliance for Education (MBAE) says since reasonable people often disagree on what’s best for students, credible research is needed to guide a policy debate away from ideology. She says her group’s ability to provide objective evidence on the Common Core State Standards and municipal health care reform “provided a catalyst for decisions and actions that we felt best served the needs of students and the education system.”

Great advocates don’t just highlight problems; they propose concrete policy solutions backed by research and proven practice. Among those we interviewed, all had developed detailed, evidence-based recommendations about what needed to change even before windows of opportunity opened in their states. In Delaware, for example, the Rodel Foundation started in 2005 to build consensus around core policy changes, using stakeholder interviews to craft recommendations to make Delaware education world-class, identified as “Vision 2015.” That groundwork helped the state win a coveted Race to the Top award (one of only two winners in Round One of the competition) by informing and motivating policy makers even before the program’s guidelines were announced.

As advocates build trusted relationships with policy makers, they often play roles as advisors, helping policy makers assess various alternatives (weighing pros and cons and understanding which are likely to work better for which reasons) and compromises. As proposals move into more formal stages of policy making, such as legislative deliberations, advocates often bring in experts and researchers who can use data to reinforce their recommendations.

Public opinion polls are another tool for delivering objective yet persuasive information to legislators and community opinion leaders. Polling can help inside champions—who understand the need for reform yet fear the public may not be supportive—make tough votes. For example, Stand for Children in Indiana hired an independent research firm to poll teachers on proposed reform ideas. The research found many proposals for improving and recognizing teacher effectiveness had the support of rank-and-file teachers even though they were opposed by the union. Advocates made sure to carefully explain the survey’s methodology, design and results. Their goal was to ensure policy makers—who might otherwise be skeptical of research commissioned by advocates with a particular point of view—could trust the results as accurate, unbiased and consistent with the views of many classroom teachers.

Many advocates find the best way to use opinion data is to pair it with the stories of people the data represents. In Colorado, for example, advocates found that opinion research was more persuasive with legislators when combined with testimony from teachers and parents who could make the case for change in more personal ways.

Finally, in the states we studied, we also saw advocacy organizations continuing to use their credibility and their voice to help combat “reform fatigue”—the tendency of politicians to assume the problem is solved after a solution has been enacted and then to move on to the next big thing or policy debate. Advocates protect against simple solutions and silver bullets, and they continue to look for ways of keeping policy makers engaged and committed to key education priorities.
#2: Building and Maintaining Strong Relationships with Policy Champions and Leaders

There is no substitute in politics for relationships. We found that great education advocacy organizations don’t just lob proposals and ideas into policy debates; rather, they nurture relationships that foster credibility—and that lead to action on their proposals. Most advocates’ successes can be traced back to carefully cultivated, ongoing relationships with decision-makers that gave them opportunities to provide briefings on key concepts, help shape policy reforms and serve as trusted advisors and allies.

Influential board members and executive directors may know the governor and key legislators personally, or they deliberately work to build those relationships. These advocacy organizations also know when to bring their general members, board directors or others with influence to the right meetings. Perhaps most importantly, they are mindful about how they take credit for their efforts, always remembering it is policy makers who in the end stand up to take the tough votes.

At the same time, we heard that advocacy organizations understand that relationships are built on accountability; there is a difference between maintaining political and personal friendships. Political relationships are based on power and influence—and following through on promises and commitments—not on unconditional support.

Education advocacy leaders often become trusted advisors because they bring evidence and the views of the broader public. This stance brings a level of credibility that, when cultivated carefully and maintained over time, has begun to set advocacy organizations in these states apart from other education stakeholders. For example, in one state, the strong relationship between one advocate and key legislative and education department leaders developed to a point where this leader was trusted enough to be the daily go-to person on how key education legislation was evolving, preparing policy makers for meetings, and briefing them on the impact of proposed changes to the bill.

While advocacy efforts are often most successful when they leverage a governor’s leadership—and the bully pulpit he or she commands—talented and motivated legislators also have shown tremendous leadership in several states, complementing supportive governors or acting as the principal advocates for change. Given the discretion legislative leaders typically have to accelerate or block the progress of a bill, great advocates recognize the need to answer their questions and arm them with data, too.

In fact, legislators can be more than gatekeepers: They can be the powerful catalysts for reform, which is the role Colorado State Senator Mike Johnston played as the chief champion for the sweeping “Great Teachers and Great Leaders Act” in 2010. He performed a central role in the entire policy making process, convening regularly a small team of advisors and advocacy group leaders to build public awareness, gather coalition support and direct lobbying strategy. (For a more detailed case study about the advocacy activities that contributed to passage of this act in Colorado, see “Creating a Winning Legislative Campaign: The Colorado Story” by Scott Laband, formerly of Johnston’s staff and now with the advocacy group Colorado Succeeds.)

Colorado State Sen. Mike Johnston (on right, shown with former Gov. Bill Ritter) drove passage of the groundbreaking bill which overhauled teacher evaluation and tenure.
In Illinois, House Speaker Michael Madigan and State Senator Kimberly Lightford, along with several House and Senate education committee members, played pivotal roles in landmark education legislation in both 2010 and 2011. One legislative tradition in Illinois called the “agreed bill process” effectively requires all stakeholders to agree to the contents of legislation before it’s introduced, and Speaker Madigan decreed this would occur with the teacher effectiveness legislation. Then, Senator Lightford took the role of convener in the four-month, intense negotiations that created the 2011 “Performance Counts Act.” (To learn more about the process in Illinois that led to its sweeping reforms in 2011, see “Illinois: The New Leader in Education Reform?” by Elliot Regenstein of EducationCounsel LLC.)

These sorts of relationships shouldn’t last just one legislative session. Effective education advocacy organizations in states with a local track record and momentum behind a key policy (such as Massachusetts, where the 1993 state law establishing new standards and accountability requirements remains the guiding framework for school improvement) sustain change by providing the institutional knowledge and continuity across political and leadership transitions in the state.

Policy maker relationships don’t stop at the Capitol doors; education advocacy organizations that want to see good policy not just enacted but implemented well have wide and deep relationships with other key policy makers besides the governor and members of key legislative committees—such as state board of education members and staff, state education agency leadership and staff (often reaching past the cabinet into the bureaucracy when it comes to implementation), and educator standards/licensure boards, to name just a few.

They also carefully cultivate professional relationships with the governor’s chief of staff, budget director, policy director and legislative liaisons, not just with the governor’s education policy advisor. Also important to advocacy groups are relationships with legislators’ staff members who control access and provide advice.

In one state, for example, an advocacy organization was instrumental during legislative debates in 2011 by bridging the different approaches (and egos) at the state department of education (with board members appointed by the governor) and the legislature, keeping negotiations moving forward.

Advocates work constantly to identify potential leaders, educating them on their state’s reform history once they are elected and helping them find their footing as champions critical to sustaining momentum for reform. In Oregon, Stand for Children and the Chalkboard Project teamed up for events designed to educate lawmakers, including an educator-led conversation on policy in 2011, and a briefing for new legislators in late 2010 designed to serve up interest and understanding in the teacher effectiveness policy reforms to be introduced. In Ohio, the Fordham Institute and other advocates have long worked together to bring national experts to the state to tap the best thinking in the field and help build knowledge among policy makers.

How do advocates build and maintain respect of leading policy makers? Three values emerged throughout our interviews:

• Advocacy organizations deflect credit for victories back to inside champions, making them into heroes.
• Great advocates maintain fidelity to values based in student achievement, staying above the fray when fights become more about political ideology than what is best for kids.
• They are discreet: Advocates do not divulge confidential conversations with opponents or proponents.

Stand for Children and the Chalkboard Project brought Oregon educators and legislators together in August 2011 for a conversation about education policy.
#3: Negotiating Skillfully
Having powerful friends on your side ready to push for important policy changes is terribly helpful—but often still isn’t sufficient to get a controversial policy enacted. Great advocates leverage their reputation as objective sources for information by identifying ways to bridge gaps between current laws and best practices, often translating nationally recognized reform concepts into concrete, locally appropriate solutions. Throughout the political process, great advocates are clear about what they want to win—and organize their volunteers, board members and other assets to accomplish that goal—but also can appropriately dial back expectations and declare success if they are victorious with only part of their agenda.

In several states, for example, advocacy organizations helped policy champions develop a legislative agenda by analyzing federal Race to the Top scoring criteria and mapping out clearly what it would take to make the state more competitive in the competition. When Race criteria were finalized in late 2009, Advance Illinois rapidly produced an analysis that compared the criteria to existing Illinois law and code and then offered a “to-do list” for key state leaders (governor, legislators, state board of education, etc.) to close these gaps and make the state more competitive for an award. Advance Illinois’ leaders see this report as one of their most critical contributions to the coalition effort that resulted in a flurry of action in time for the state’s Race to the Top Round 1 application in early 2010, as well as laying the groundwork for even more sweeping legislation in 2011.

Even though the solution that passes the legislature may rarely mirror exactly what advocates propose at the outset, those plans play a crucial role in framing the initial conversation and policy options on the table.

Education advocacy organizations further enhance the likelihood their legislative priorities will become law by looking for ways to address (or rebuff) the criticisms of opponents and by building a broader circle of supporters who see the policy approach as “reasonable.” In some cases given political contexts, advocates found it most helpful to separate specific priorities from larger packages of legislation laden with contentious proposals. Doing so helped them avoid getting sucked into bigger and nastier debates about whether these comprehensive approaches (and the legislators pushing them) were “anti-teacher”; advocates could instead stay more focused on specific policies they cared about.

In other states, advocates found success by lobbying to separate their priorities (such as changes to tenure and layoff rules) from bills perceived as broadly gutting collective bargaining rights; these advocates were clear about what they supported, what they didn’t and why. In Indiana, for example, Stand for Children attached its proposal to end teacher “last in/first out” layoff polices to an educator evaluation bill in the 2011 session, rather than a highly controversial bill limiting collective bargaining. Similarly, in a different state, advocates contrasted their favored teacher tenure reform proposals in 2011 against a less popular anti-collective bargaining bill, which also helped win support from legislators on both sides of the aisle.

In the End, Character Matters
It’s often said in politics to “keep your friends close and your enemies closer,” and advocates in every state stressed their successes in maintaining relationships with everyone involved in the legislative process. Trust is an essential element in any process that involves negotiations. The groups we interviewed advised that it’s important to find common ground whenever possible, largely by sticking to student achievement-driven values over political ones. Sometimes this means groups will side with legislators and other groups on one side of the political spectrum more often than not, but this approach also gives advocates the flexibility to work with former opponents (thus also demonstrating that their positions are driven by the needs of students and not a political ideology). As Advance Illinois’ Robin Steans reflected on all the meetings, conversations and negotiations that led to the “Performance Counts Act” in 2011, she observed that “character mattered enormously.”

Advance Illinois Executive Director Robin Steans was one of many stakeholders who spoke at the signing ceremony for the teacher effectiveness legislation passed in 2011.

Advocacy groups consistently suggested that disagreements with policy makers should be handled with grace and focused on maintaining productive relationships in the long-term. For example, in one state where funding for a key education reform initiative was cut during behind-the-scenes negotiations on the budget, an advocate drafted a media statement blasting the decision. Rather than rushing to share the message with the press, however, she first hand-delivered the statement to the house speaker and senate president to give them a heads-up. This courtesy offered legislators an opportunity to improve their position before the disagreement went public, which they did. But even when disagreement persists, fair warning that more intense lobbying is on the way helps maintain working relationships on future issues.
#4: Recruiting the Broadest Coalition

Great advocacy groups deliberately seek strength in numbers by building broader coalitions with others to press for reform when the time is ripe for change.

The most common thread across these states that enacted reforms was actually a lack of tight coordination among the varied members of these coalitions. Certainly, most education advocacy organizations worked side-by-side with each other to overcome opponents and win reforms in their states; they often plotted strategy, distributed common talking points, and coordinated tactics on particular issues and proposals—often with one organization in the lead. But they didn’t always develop and share identical policy agendas, allowing some differentiation to flourish, which strengthened their overall impact. The ad-hoc nature of these relationships did not seem to impair their efficacy.

This approach is explained perhaps in part because coalitions derive strength from their diversity and their size. The more effective ones have developed deliberate strategies to harness this potential, such as recruiting groups that aren’t traditionally considered single-issue education organizations. In Colorado, for example, support for 2010’s sweeping “Great Teachers and Great Leaders Act” came from—and was deliberately cultivated from—diverse constituencies, including civil rights groups arguing for reform in concert with business groups. The breadth of the coalition in Colorado demonstrated wide and deep support to every legislator; everybody who was anybody—including the state’s four living past and current governors—publicly endorsed the legislation. Then, when the Colorado Education Association refused to sign on to the coalition that included 22 stakeholders groups, 40 community and business leaders, and the American Federation of Teachers, the union became widely seen as the only major group in Colorado to oppose progress on an issue that clearly mattered to so many other important constituencies.

Coalitions can build influence not only by demonstrating the presence of diverse constituencies, but also by leveraging the different strengths of coalition members. Some groups are better at delivering a grassroots voice, while others wield the cudgel of electoral consequences, and others stay above the fray and play the role of trusted educator and mediator. In Tennessee, the State Collaborative on Reforming Education (SCORE) produced talking points that its coalition members could use to supplement their own perspectives during 2011 debates on teacher tenure reform. In several states with more than one PIE Network member, advocates found a way to play “good cop, bad cop” roles to capitalize on the groups’ complementary strengths and reputations. At their best, advocacy groups in the 11 states we researched worked with other coalition membership to develop a coordinated strategy for lobbying the legislators with whom each could have the greatest impact, given their background and their message. The goal was to maximize “touches” with legislators, and to do so with the highest quality contacts that would be most persuasive or influential with individual legislators.

All coalitions, especially more diverse or inclusive ones, often struggle to find a common goal—but it is the common goal and unified voice that make a coalition effective. Many advocacy organizations reported managing inherent tensions among different organizations by focusing on a shared “horizon point” for improving student achievement rather than debating the particulars of every single piece of legislation or agreeing on a single, common policy agenda. Such an approach also allows different organizations to lead or have a bigger profile on different issues.

The most successful advocates also worked hard to maintain constructive relationships with the organizations representing employee interests, despite regular disagreements over policy proposals and priorities. They keep these interests informed in the same courteous way they work with policy makers. Many times, they even directly recruit district- and school-level administrators and teachers to inform and advocate for their proposals.

Still, determining the strategies for best engaging employee unions remains an ongoing challenge: Is it better to try to outmaneuver or try to reach agreement? Depending on the local context, advocates worked in different ways to build the most fruitful relationship possible. In several states, advocates found it possible to build relationships with union leaders by knowing what to praise in public and what to criticize in private, understanding what motivates union leaders, and what they need in order to attract and maintain member support. In Illinois, advocates publicly praised the three most influential teachers unions—a mix of NEA and AFT affiliates—for introducing a promising, reform-oriented agenda on teacher effectiveness prior to the 2011 session, signaling their interest in working toward finding common ground with these groups.
#5: Agitating To Keep the Pressure On

In our interviews, we heard how advocacy organizations used grass-roots tactics to counter voices of opposition; when consensus fails and policy proposals become divisive and debated, advocates use the same grassroots strategies deployed by opponents to communicate with lawmakers. This strategy is the other end of the influence arc that begins with bringing plans for action to the table (strategy #3 above): Great advocates create pressure (and artfully manage tensions) to cause action and ultimately help forge creative, winnable solutions.

The many organizations representing educator and other employee interests are all resourced to maintain a constant and vocal presence in education policy deliberations, as representatives of a large and geographically diverse constituency. While collaboration or agreement with these groups in particular is often optimal for speeding passage of a proposal, sometimes advocates fill an important role as a countervailing voice for change.

Advocates in some states have begun working to enlist individual teachers in shaping reform proposals and becoming influential spokespersons for change (although this strategy is still rare and hard to implement well, since many educators are reluctant to publicly break with the positions of their unions). Stand for Children in Indiana collaborated with TeachPlus, a network of Indianapolis teacher leaders who had developed their own reform-minded position on teacher effectiveness policies, to connect teachers with legislative leaders. Teachers who could speak knowledgeably and articulately about why they wanted to eliminate “last-in/first-out” teacher layoff policies, even in small lunchtime meetings with education committee members, proved a powerful counterweight to the official teachers union voice and opposition.

Other more general tactics that have proven effective range from low degree-of-difficulty and low-cost activities like online petitions to sophisticated phone banking and full scale displays of grassroots might. In Oregon, Stand for Children’s Presidents’ Day rally outside the Capitol building generated significant media coverage of thousands of supporters of all ages. The rally also provided an opportunity to shine the spotlight on legislative champions the group had carefully invited to address the crowd. As one advocacy leader in Colorado observed, effective organizations should wield their power with “laser-like” focus, careful to avoid an indiscriminate “floodlight-like” approach that may alienate potential future allies and inside champions.

Effective education advocacy organizations also keep key civic and business leaders engaged to understand and support the nuances of specific policy proposals, such as by including them in meetings with newspaper editorial boards or key lawmakers. Partnerships with business leaders and associations can be particularly helpful because of the longer-term horizons and sustained involvement they bring to state policy deliberations (in comparison to elected officials that too often are subject to short election cycles and thus short attention spans).

More than 2,000 students and parents gathered on the steps of the Oregon State Capitol in February 2011 to support better public schools, in a rally organized by Stand for Children.
#6: Setting the Stage for Future Successes

Successful advocates aim to enact legislation with as much bipartisan support as they can muster, based on the intuitive belief that widespread buy-in upfront will improve the odds of successful implementation and prevent rollbacks in the law when new lawmakers are inevitably elected in the future. Two states with longer reform histories bear evidence that this effort can pay off.

In Ohio, a state which has witnessed a constant tug-of-war among political parties for the governor’s office, advocates have shouldered the responsibility to find common ground and massage education policies to include minority viewpoints (from whichever party is not in power) and even to develop champions in the minority camp. And in Massachusetts, the selling point for education reform since 1993 has been its bipartisan nature, fostered in large part by groups such as the Massachusetts Business Alliance for Education (MBAE). Through five gubernatorial transitions with Republican and Democrat governors, and a legislature controlled by Democrats, the state has not backed down in the face of strong campaigns to weaken reforms. MBAE’s leader, Linda Noonan, urges advocates to remember their aim is improved outcomes for students, and not merely the policy “win.” The best advocates value long-term impact over short-term gain.

Successful advocates in nearly every state reported that their broader coalitions were kept intact by each group’s ability to keep its ego in check. With a single-minded focus on student achievement as their compass, advocates shared credit widely to avoid turf wars, protecting relationships they need to work together in the future.
Looking Forward: Policy Implementation, Not Just Adoption

With sweeping reforms enacted in their states over the past two years, advocacy organizations face a dilemma: Do they continue to press for additional policy changes at the legislative level given favorable environments and strong elected officials, or do they move their attention to state boards and agencies to ensure hard-fought (and still contentious) policy is implemented well?

It can be tempting for reformers and their backers to see legislative change as their biggest victories, but effective advocates understand that adopting policy is only the first step in creating changes that positively impact schools. Once new policies are adopted, legislative champions often move on to other priorities and the public spotlight moves with them, even while critical details are still being worked out by education agency boards and staff. Certainly, the work of monitoring implementation is less high profile and less headline-generating; still, advocates increasingly recognize how essential it is to attend to those details to protect the original legislative intent. The tools used in effective advocacy campaigns are just as important and just as needed during the rule-making process that governs how a new policy will be implemented.

For example, the Massachusetts Business Alliance for Education (MBAE) has worked as diligently to monitor the implementation of newly passed laws as it has to help pass them. When state leaders proposed eliminating the Office of Education Quality and Accountability, MBAE raised concerns about state oversight of local district performance. When reorganization passed despite those concerns, MBAE secured appointments of its leaders to seats on a new advisory council where they could constructively influence the design of the state’s new approach. MBAE also shapes implementation through appointments to task forces, such as those on educator evaluation and integrating college and career readiness initiatives. Advocates also have taken time during legislative negotiations to settle key issues and prevent them from going to a rule-making process that they might not be able to influence.

Education advocacy organizations also support the integrity of the policies they help pass by acting as watchdogs over implementation deliberations and by continuing to provide analysis that is credible and objective. These tactics are similar to those employed when advocates monitor legislation: They produce easy-to-read memos reporting on implementation progress; they convene outside experts to bring an experienced voice to the table; they attend public implementation meetings to deliver testimony on their group’s behalf; and they even find more creative routes to bring attention to progress in implementation, as one organization proved with its plans to conduct “secret shopper” quality control tests inside local schools to see if policy mandates were resulting in changes in practice. Advocates can even be invited by policy makers to assess reforms that are at risk of being rolled back. For example, in December 2011, the controversy over Tennessee’s new system of teacher evaluations led Gov. Bill Haslam to ask the State Collaborative for Reforming Education (SCORE) to conduct a formal review, in a bid to head off legislative action.

The most effective advocates continue to garner public support by communicating the need for change and what change will look like when it is complete. One common way they keep the public spotlight on education issues is by issuing periodic reports that summarize and analyze the work accomplished while highlighting what needs to come next. For example, the Rodel Foundation of Delaware, in conjunction with the Vision 2015 coalition, used the first anniversary of the state’s Race to the Top win in March 2011 as an opportunity to draw attention to where Delaware stood on meeting its commitments to becoming world-class; they released a short report with a clear checklist of “what’s been done” and “the work ahead,” explaining why the work matters and how it ultimately relates to students. The Massachusetts Business Alliance for Education commissioned a similar assessment in November 2011 of Race to the Top implementation in its state.

Finally, advocates recognize that the bold reforms at the top of many advocacy agendas—Common Core standards and aligned assessments, teacher and principal effectiveness, new technology and data systems, and fostering innovators such as charter schools—are especially challenging for state agencies to manage and implement. Advocates, we heard, are increasingly mindful about the support they can provide to help their states meet these needs—while still remaining independent enough to continue playing the role of a critical friend when necessary. Advocacy organizations have loaned staff to state implementation bodies, helped the state hire and pay for new, talented staff, or underwritten research that the state can use in implementation.
Conclusion

The role of an education advocacy organization takes many shapes, but in our research we saw how great advocates both contributed to and capitalized on favorable political conditions by sticking to common, winning strategies. This paper highlights the characteristics of the advocacy leaders who have helped bring about change in an era of declining education budgets, Race to the Top-driven reforms and leadership transitions across the country.

Each state we examined for this research benefited from the leadership of strong policy makers dedicated to pursuing real change. But just as important, each also shared the presence of invaluable advocacy organizations. In each state—and through each stage of policy making—these advocacy leaders leveraged evidence, their constituencies and political acumen to help these champions lead. They constantly point to the need to improve the quality of education and the strategies that will help, and they create public urgency to help other policy makers decide to do the right thing. Then, when policy gains are won, they stay focused when some policy makers move on to shepherd the gains through successful implementation.

As we noted at the beginning of this report, policy making is chaotic and conflict-ridden; even the best ideas don’t get enacted on their own. Advocacy organizations around the country are playing essential roles in partnership with policy champions to bring needed changes to improve our public education systems.