HOW TO DEVELOP AN EFFECTIVE STATE POLICY AND ADVOCACY PLAN FOR YOUR ORGANIZATION

Edtech Advocacy Toolkit

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Purpose of the Guide

This guide provides detailed instructions on how to become more involved in state advocacy (i.e. the *active recommendation* of a particular policy) through the development of an actionable policy and advocacy plan — whether you hope to inform state policymakers on issues important to your stakeholders or champion specific legislation aligned to your organization's goals. Reach out to ISTE at advocacy@iste.org for additional support and guidance in developing the plan.

Part 1: Preparing for the Plan

STEP 1: ESTABLISH A WORKING GROUP

Designate a working group to lead this project, composed of your organization's board of directors, senior leadership, members of the advocacy committee and other interested stakeholders (internal or otherwise). This group would be responsible for meeting face-to-face for a one- to two-day session, where members articulate the organization's policy priorities and develop an actionable plan aligned to those priorities.

STEP 2: DEVELOP YOUR VISION FOR STATE ADVOCACY

Review ISTE's guide to state leadership to learn about how these figures influence the use of educational technology in schools. State leaders — including the state board of education, state education agency, governor's office and state legislature — have tremendous impact on policies that impact digital teaching and learning.

Within your working group, collaboratively answer these foundational questions to develop a shared vision for your organization's advocacy work.

1. Why is it important to inform policymakers on issues facing schools around digital teaching and learning?

2. Given members' experiences and expertise, what is the specific role that your organization can play to impact state policy decisions?

3. What does the "end goal" look like? What will happen if the status quo is maintained?

STEP 3: REVIEW PAST AND CURRENT ADVOCACY EFFORTS

Review your organization's past and current advocacy efforts (if any) and document successes and challenges. Within your working group, collaboratively answer these questions:

1. How did the organization get involved in advocacy? How has the advocacy program grown or become less prioritized?

2. Which past activities (e.g. events, campaigns, resource development) saw successes/challenges? Why?

3. What are some ongoing advocacy activities? Do these activities reinforce each other or are they more scattered (and thus diverting from your organization's core priorities)?

4. Does the organization have the capacity to sustainably carry out all current advocacy activities?

5. Are resources distributed between these activities in a manner that is aligned with your organization's priorities?

6. What are the leadership strengths of the organization's members? How can your advocacy activities build on these strengths?

STEP 4: REVIEW ARIZONA TECHNOLOGY EDUCATION ASSOCIATION'S (AZTEA) PLAN

To get a sense of what the final plan might look like, review [AzTEA's Public Policy Statement and Advocacy Plan](#). Within your working group, collaboratively answer these questions:

1. What did you like most/least about this example plan? Does this structure work for your organization's needs? Which ideas resonated with your working group?

2. How can the working group craft a state policy and advocacy plan that supports your own organization's broader goals?

3. Which existing resources (e.g. internal leadership, external partner organizations, funding sources, specific policymakers/staffers) could your organization leverage to carry out the state policy and advocacy plan?

Phase 2: Developing the Plan

You are now ready to begin developing your organization's state policy and advocacy plan. While conducting the activities listed in this phase, use the "Crafting Your Message" template to take collaborative, detailed notes. Refer to this completed copy of the template for an example.

STEP 1: IDENTIFY KEY POLICY ISSUES OF FOCUS

With your working group, identify which state policy issues your organization will focus on. Keep this list as succinct as possible to ensure that your organization's focus and resources will not be spread too thin among redundant policy issues. Ensure that all policy issues are aligned to the advocacy vision outlined in phase 1, step 2. Record these issues at the top of the "Crafting Your Message" template (one issue per copy).

In identifying these policy issues of focus, it may help for the working group to collaboratively answer these questions:

1. Which education and economic issues do your state leaders prioritize? What themes do the governor, state legislators or other leaders talk about the most?

2. How do the causes you care about also help policymakers solve an urgent problem or support their aspirations for the well-being of the state's constituents?

3. Given your members' experiences and expertise, which areas can your organization make the greatest impact?

As an example, see ISTE's "Improving Student Outcomes through K-12 Edtech Policy" resource. ISTE's advocacy team identifies three primary state policy issues of focus: adopting, adapting or endorsing the ISTE Standards, designing state credentialing systems to build educators' capacity to use technology and advocating for budgets that adequately support edtech priorities, particularly educator professional development and certification. Find other potential policy issue candidates on ISTE's policy principles page.

Resources to Inform Your Policy Priorities: State of the States

The best sources to learn about your state leaders' (e.g. state board of education, state education agency, governor's office, state legislature) priorities are their websites. For example, each governor presents their State of the State address within the first several months of the calendar year to highlight recent accomplishments and outline key goals (i.e. their top priorities). The full text of your governor's address can be found on the governor's office website and serves as an ideal source for finding areas of alignment between your organization and the state leadership.

There are also several organizations that track and analyze State of the State addresses, including the Education Commission of the States (ECS) and the National Association of State Budget Officers (NASBO).

Resources to Inform Your Policy Priorities: Legislative Activities

Research what edtech-related legislation has been introduced and/or passed recently in the state legislature. This process will help you understand the state legislature's scope of work and priorities around edtech as well as identify current champions of edtech legislation. Use the "Find Legislation" tool on ISTE's Advocacy page to search for keywords related to your policy issues of interest. The tool will show corresponding bills sorted by state. Click on the bill's title and learn about its goals and sponsors.

Resources to Inform Your Policy Priorities: Data Sources

Most state education agencies have a dedicated division responsible for data collection, reporting and analysis (typically for accountability purposes). For example, Virginia's Department of Education features a Statistics and Reports page, which features student, teacher and workforce data. Other sources of data include:

- EducationSuperHighway (school connectivity)
- Civil Rights Data Collection (federal source on educational equity)
- National Center for Education Statistics (federal source on a variety of topics)
  - Fast Facts about Education
  - Data and Tools
  - National Assessment of Educational Progress (NAEP)

STEP 2: BRAINSTORM ADVOCACY AUDIENCES AND ACTIVITIES CORRESPONDING TO EACH POLICY ISSUE

Now that you have identified the organization's policy issues of focus, the working group must determine how the advocacy will be conducted. Review ISTE's guide to state leadership once more and list potential advocacy audiences in the "Audience" row of the "Crafting Your Message" template. Note that some audiences are already identified for you.

In identifying potential advocacy audiences, it may be helpful for the working group to complete ISTE's state legislator scavenger hunt. Use the lookup tool on the ISTE's Advocacy page under "Find Politicians" to locate the names of your state officials. Use the chart provided in the scavenger hunt resource to identify key information about them including party affiliation, committee assignment and policy priorities.

Next, collaboratively with your working group, use the information gathered in phase 2, step 1 to record the priorities of each state leader in the "Desired Outcome(s)" row. Afterwards, write down key messaging points that you would like to deliver to these state leadership groups (aligned to their priorities) in the "Message(s)" row.

Finally, with your working group, brainstorm possible advocacy activities that would be effective for delivering those messages to state leaders. List those ideas in the "Channel(s)" row. ISTE provides a list of potential activities for your organization to consider on this checklist, including conducting a face-to-face meeting with a policymaker. If possible, write down when it would be appropriate to host those activities in the "Timing" row.

Other questions for the working group to consider include:

1. Refer to phase 1, step 3. Which past, effective advocacy activities could you continue pursuing?

2. Knowing that organizational resources will be limited, which advocacy activities would be the most impactful and cost-effective?

Tips for Identifying the Appropriate Timing for Advocacy Activities

Find the legislative calendar for your state legislature on their website. Most states have a "pre-filing" period that begins in the fall of each year and closes several weeks before the start of the legislative session. Legislative sessions typically begin in January or February. However, not every legislature meets each year. Montana, Nevada, North Dakota and Texas meet every other year. For more information about state legislatures, consult ISTE's guide to state leadership**.**

STEP 3: IDENTIFY POTENTIAL PARTNERS

Partnering with other organizations —such as district school boards, superintendent associations, nonprofit organizations, chambers of commerce, parent-teacher organizations and the business and higher education sectors — can help amplify your message and maximize limited resources. Other potential partner organizations include state chapters affiliated with ISTE, the State Edtech Directors Association (SETDA) and the Consortium for School Networking (CoSN).

With your working group, List potential partners under the "Advocacy Groups" heading in "Crafting Your Message" template. As you did with the state leadership groups, write down their desired outcome(s), your messaging points for approaching them, channels through which you could collaborate, as well as the strategic timing of the collaboration.

A great example of a partnership opportunity would be to co-develop a letter writing campaign calling for the state-level adoption of the ISTE Standards. In doing so, you may work with organizations such as a local or state parent-teacher organization, who often advocate for high-quality instruction, and your chamber of commerce, who is often focused on economic competitiveness.

Other questions for the working group to consider include:

1. Which organizations are you already working with (on advocacy matters or otherwise)? How could you leverage this existing relationship?

2. Is the potential partner an organization that is fully-aligned with our organization's vision for advocacy (refer to phase 1, step 2)? How well-known and respected are they? Do they help my organization's reputation and branding? Do they have a track record of lasting impact?

3. What are the most impactful activities that you can do together that would not be as impactful if you worked separately? Who is best suited to lead certain activities? How do we share the costs of conducting joint advocacy efforts?

Phase 3: Documenting the Plan

With the collaborative, detailed notes on the "Crafting Your Message" template, you are now ready to officially document the plan. Refer again to AzTEA's Public Policy Statement and Advocacy Plan for an example template. Your plan should incorporate, at a minimum, the following information:

- Organization's advocacy **vision**, identified in phase 1, step 2
- Policy **issues** of focus, identified in phase 2, step 1
- Advocacy **audiences**, identified in phase 2, step 2
- Advocacy **activities** and timing identified in phase 2, step 2
- Advocacy **partners** identified in phase 2, step 3

If appropriate, post the plan onto your organization's website to make your advocacy goals known and attract potential partners.

Conclusion: Why State Advocacy?

State policies matter for preparing our students for tomorrow and ensuring that our teachers have the skills to provide learning experiences enriched by technology. Educator and student voices can make a huge difference in how these decisions are made and advocacy organizations help in making sure that policymakers hear those voices. The steps outlined in this guide are intended to ensure that all advocacy activities maximize their potential to amplify educator and student voices. Reach out to ISTE at advocacy@iste.org for support and guidance in executing the plan.