



# Chapter 5

## Policy Education Kits



## Chapter Learning Objectives

As a result of using this chapter, you will be able to:

1. Describe a policy education kit.
2. Discuss the benefits of creating a policy education kit.
3. Create components for a policy education kit.
4. Use the education kit to:
  - Teach others how to effectively educate policymakers on chronic disease issues.
  - Document your health promotion policy expertise to policymakers and key stakeholders.

The policy landscape can change in an instant. Also, short timelines mean journalists and policymakers' staff often need information right away.

A policy education kit is an essential resource that enables you and your partners to make the most of emerging opportunities to advance policies that support population health. See examples in [Chapter 6](#).

## What Are Policy Education Kits?

Policy education kits are sets of materials that you and your partners can use to educate and inform decisionmakers about specific strategies to prevent chronic diseases. The kits directly support your action plan and can be tools to support stakeholder involvement.

A policy education kit should evolve over time as the policy landscape changes. For example, if your policy goal shifts because the original goal is no longer feasible, then update the talking points to reflect this change.

## What Are the Benefits of Creating Policy Education Kits?

The process of creating your policy education kit will help you:

- Better define and articulate values and principles about preventing chronic diseases.
- Become more informed about your policy issue.
- Hone your policy communications skills.
- Develop leadership.

Once your policy education kit is ready, you can use it to:

- Gain media exposure.
- Recruit, train, or prepare coalition partners to educate policymakers.
- Inform target audiences about prevention policy.
- Strengthen coalitions and build new alliances.
- Assist policymakers in translating the evidence base for application.
- Demonstrate your policy expertise.

## What Materials Should the Kit Contain?

A policy education kit could include a range of materials, as illustrated in [Figure 5-1](#). Select items that will have the most impact on your target audience(s) in support of your policy goals.

We offer guidance for five of these materials: policy briefs, model legislation, stories, traditional media products, and social media.

**Figure 5-1. Potential Items for a Policy Education Kit**

Action Plan Tactic	Potential Education Kit Materials
Media Outreach	<ul style="list-style-type: none"> <li>• Press releases</li> <li>• Media advisories</li> <li>• Op-eds</li> <li>• Letters to the editor</li> <li>• Social media platforms</li> </ul>
Direct Policymaker Education	<ul style="list-style-type: none"> <li>• Policy briefs or white papers</li> <li>• Fact sheets</li> <li>• Sample proclamations</li> <li>• Model legislation</li> <li>• Stories</li> <li>• FAQs on a website</li> <li>• PowerPoint presentations</li> <li>• Educational videos</li> </ul>
Stakeholder Education and Training	See materials in the above cells but adapt for literacy level, language, and culture.
Other (multiple tactics)	<ul style="list-style-type: none"> <li>• List of credible informational resources about your issue (e.g., in an annotated bibliography of published research)</li> <li>• Case studies</li> <li>• Articles or blogs from local media</li> <li>• Results of public opinion surveys</li> <li>• List of subject matter experts</li> <li>• Webinars and online widgets</li> <li>• Event promotional flyers and notices</li> </ul>

## Examples of Policy Education Kits

SOPHE Advocacy Toolkit includes fact sheets, budget impact stories, lists of key legislators, Powerpoint presentations, letters to Congress, and testimony:

<http://www.sophe.org/AdvocacyToolkit.cfm>

### Set the Standards Ohio

A case study featured in [Chapter 6](#) —is an online policy education kit created by the Buckeye Health Schools Alliance:

<http://setthestandards.wordpress.com/>

## Tips: Share the Work!

Use your coalition to help develop your kit.

### Potential Benefits

- Improved quality resulting from collaborating others who have different expertise and experiences.
- Broadened potential reach because partners will have helped develop messaging and may be more inclined to activate their networks.
- Additional resources to include in the kit.
- Enhanced credibility.

## Policy Briefs

### What Is a Policy Brief?

Policy briefs are concise, stand-alone documents focusing on a particular issue requiring policy attention. Policy briefs:

- Explain the issue clearly and concisely using authoritative data or information sources.
- Convey urgency.
- Offer policy implications or recommendations.
- Summarize the evidence for and against the recommendations.
- Point readers to additional informational resources.

In contrast, white papers tend to be longer and more technical than policy briefs. Often white papers describe the problem, review the literature, analyze policy options, and recommend action. Policy briefs can be based on white papers.

### Format Options for Policy Briefs

Policy briefs can either be in a memo or published format. Figure 5-2 highlights the differences between the formats.

**Figure 5-2. Characteristics of Policy Briefs in Two Formats**

Memo Format	Publication Format
Internally focused	Externally focused
Demand-driven	Supply-driven
Narrowly focused	Broadly targeted
A general overview of the subject showing multiple opinions or viewpoints	Research summary that supports the main argument of the brief
Multiple, and even competing, solutions	Strong, clear, and coordinated policy recommendations or implications

## Resources

### Training

If you're training others to develop policy briefs, we've provided a tool that uses an existing policy brief to help participants understand best practices.

### Learn More

Communicating prevention messages to policymakers: The role of stories in promoting physical activity, *Journal of Physical Activity and Health* (Washington University):

[http://paprn.wustl.edu/past-projects/Documents/Stamat-akis\\_policymkrs.pdf](http://paprn.wustl.edu/past-projects/Documents/Stamat-akis_policymkrs.pdf)

## Audience Checklist

Before you draft a policy brief, consider the context to help you define and understand your audience.

Ask these questions:

- Who is the primary audience you want to reach?
- How do they currently perceive the issue?
- How much do they already know about the issue?
- How open are they to your message(s)?
- What questions do they have that need answers or clarification?

## Policy Briefs :: continued

### Sample Outline for a Policy Brief

Aim for a two-page policy brief. Do not exceed four pages.

A typical outline includes the following.

- Executive statement
- Introduction and background
- Analysis
- Results
- Implications or recommendations
- Conclusion
- References and useful resources

The executive statement and introduction must convey the importance (why care) and urgency (why now) of the issue.

**Implications** sections should answer this question: What policy changes or actions do the results point to? Make sure your implications are:

- Supported by sound, scientific evidence.
- Actionable.
- Less direct than recommendations in what should happen next.

**Recommendations** sections should answer: What does the analysis indicate should happen in this issue area? Make sure your recommendations are:

- Supported by sound, scientific evidence.
- Framed for action.
- Stated as precise steps that explain what should happen next.

## Policy Briefs :: continued

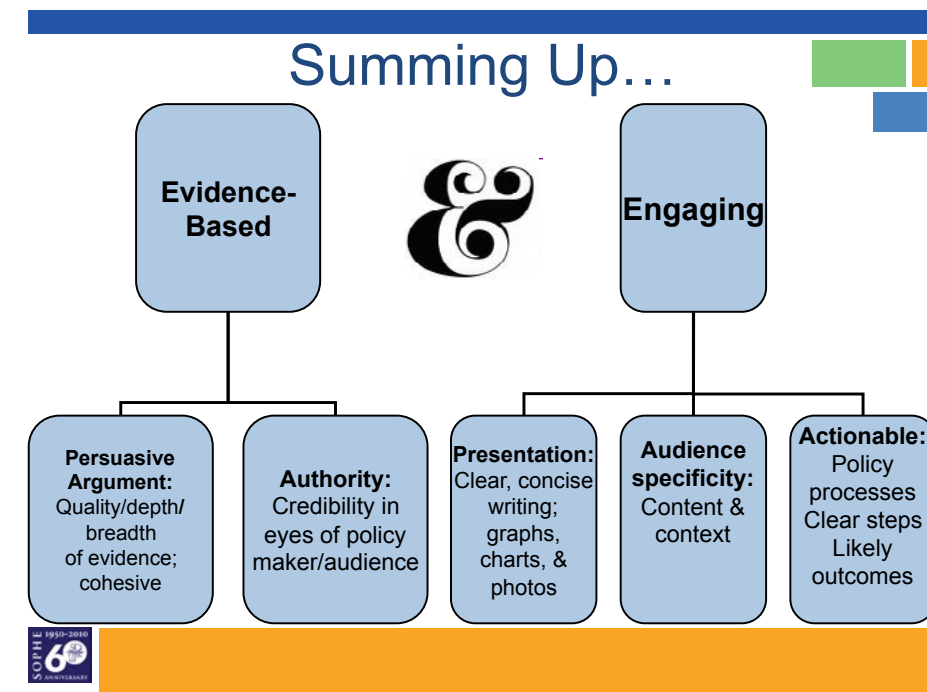
### Best Practices for Policy Briefs

Effective policy briefs are both evidence-based and engaging, as illustrated in Figure 5-3. They use the evidence to make the case for attention to the issue and to convey credibility. Effective briefs are also tailored to the audience(s), provide clear steps, and are visually attractive and well written.

When developing policy briefs or other briefing materials (e.g., testimony, fact sheets), write in a way that you would be comfortable with the information appearing in the newspaper or being retweeted to thousands on Twitter.

#### Figure 5-3. Characteristics of Effective Policy Briefs

Source: Schober M. (2010, April 7). Preventing Chronic Disease Action Kits. Powerpoint presentation at the State Health Policy Institute II. Atlanta, GA



Examples

SOPHE Policy Briefs:

<http://www.sophe.org/chronicdiseasepolicy/index.cfm>

Health Policy Connection (Robert Wood Johnson Foundation):

<http://www.rwjf.org/health-policy/>

Issue Briefs (Kaiser Family Foundation):

<http://www.kff.org/content/issuebriefs.cfm>

## Tools

Appendix B has examples of:

- A city or county resolution regarding childhood obesity.
- State legislation for a study on racial and ethnic disparities.

These examples can be directly adapted in support of healthful food in school vending machines and the disparity study. Alternatively, follow their structure to create model legislation on your issue.

## Other Resources

CDC Public Health Law News (a free monthly e-mail digest on public health law and legislation):

<http://www2a.cdc.gov/phlp/CDCPHLN>

## Model Legislation

Model legislation helps you, your partners, policymakers, and other stakeholders understand how other states or localities have used policy to advance prevention.

Two common types of model legislation are:

- **Resolutions or Proclamations** in which a governing body expresses concern for a public health issue and urges action.
- **Model statutes** that provide legislative language that could be adapted for state or local legislative consideration.

The tools sidebar provides a sample template for each. The next subsection lists some of the many sources for model statutes.

Consider using SOPHE resolutions either to inform your resolution or as a template.

The resolutions are available at: <http://www.sophe.org/resolutions.cfm>

Sources for Model Statutes

**Figure 5-4. Sources for Model Statutes by Issue Area**

Issue(s)	Source
Multiple Issues	<ul style="list-style-type: none"><li>• National Conference of State Legislatures: <a href="http://www.ncsl.org">http://www.ncsl.org</a></li><li>• Public Health Law and Policy: <a href="http://www.phlpnet.org">http://www.phlpnet.org</a></li></ul>
Cancer Prevention, Treatment	State Cancer Legislative Database: <a href="http://www.scll-nci.net">http://www.scll-nci.net</a>
Emergency Preparedness	Centers for Law and the Public's Health: <a href="http://www.publichealthlaw.net">http://www.publichealthlaw.net</a>
Health Disparities	National Health Law Program: <a href="http://www.healthlaw.org">http://www.healthlaw.org</a>
Obesity (nutrition, and physical activity)	Rudd Center for Food Policy and Obesity: <a href="http://www.yaleruddcenter.org">http://www.yaleruddcenter.org</a>
Tobacco	State Cancer Legislative Database: <a href="http://www.scll-nci.net">http://www.scll-nci.net</a>

## Compelling Stories

Don't have a story? Think again. What motivates you to work in public health and health promotion? How has chronic disease affected your loved ones? Weave that story into your communications with partners, the media, and policymakers. (See Chapter 2 for why stories are so important.)

Similarly, success stories about how a policy or program kept children safe or improved residents' health in a community can help your audience envision a better future.

Make stories prominent in your oral or written communications. Stories will provide real-life examples, make abstract ideas more concrete, and humanize dry statistics about populations.

## Tips

Prevention Speaks (a project of the Wisconsin Clearinghouse for Prevention Resources) highlights five strategies to create compelling stories.

- Appeal to people's emotions so they'll care about your issue.
- Cultivate interest by starting with action, creating hero and villain characters, adding a surprise or unusual twist, and keeping it relatively brief.
- Find vivid language that your audience will understand.
- Show your story through the use of visual aides, hands-on demonstrations, or site visits.
- Answer the "so what?" of the story, which should relate to what you want people to do. This is done with a "pivot point" that turns a story about an individual situation to one that can be applied or conceptualized for a population or community.

(Wisconsin Clearinghouse for Prevention Resources, 2010)

The tools sidebar provides a sample template, an example, and the Prevention Speaks website to help you conceptualize and present a compelling story.

## Template

Creating Your Story Use Plan (Prevention Speaks)

## Resource

Story tips, examples, and videocasts (Prevention Speaks): <http://www.preventionspeaks.org> integrates personal stories into some of the case studies

## Resources

Community Action Kit (SIECUS):

<http://www.communityactionkit.org>

Media Advocacy Manual (APHA):

<http://www.apha.org/about/news/mediaadvocacy.htm>

Now Hear This: The 9 Laws of Successful Advocacy Communications (Fenton Communications):

[http://www.fenton.com/FENTON\\_IndustryGuide\\_NowHearThis.pdf](http://www.fenton.com/FENTON_IndustryGuide_NowHearThis.pdf)

This Just In: 10 Lessons from More than 25 Years of Public Interest Communications (Fenton Communications):

[http://www.fenton.com/FENTON\\_IndustryGuide\\_ThisJustIn.pdf](http://www.fenton.com/FENTON_IndustryGuide_ThisJustIn.pdf)

Smart Chart, an interactive tool for nonprofits (Spitfire Strategies):

<http://www.smartchart.org>

## Traditional Media

Your media strategy can have both proactive and reactive elements, and your policy education kit needs to support both. Proactive outreach entails alerting the media to events and encouraging coverage of your issues. Reactive is responding to requests from journalists and monitoring the news for developments that connect to your issue.

Some of the core resources to prepare for your kit are:

- Press releases
- Media advisories
- Op-eds
- Letters to the editor
- Talking points

[This link](#) explains the purpose of traditional media resources.

Consider building a full press kit, which could have these additional items.

- Fact sheets
- Background information sheets on the issue
- Resource lists
- Photos, graphics, charts, and logos
- Brochures (collateral pieces)
- Biographical information on persons mentioned in press releases

## Media Advisories

The elements of media advisories are fairly standardized and tend to follow this structure.

### Tips

- Use local statistics to explain the issue (see sidebar).
- Don't give away the full story.
- See guidance in Chapter 3, Step E [\[hyperlink\]](#) for what to do with your media advisory, and how to make it compelling.

### Media Advisory

[DATE]

TITLE: Action Words!

WHAT: Your requested action

WHY: Include some statistics on your issue.

WHEN: [DATE]

WHERE: [PLACE]

WHO: Describe your committee (health educators, parents, coalitions partners, etc.) and give a brief mission statement.

CONTACT: Phone and email of two contact persons who can speak authoritatively and knowledgeably about your issue.

## Health Data Resources

### Local

County Health Rankings (NACCHO):

<http://www.countyhealthrankings.org>

KIDS COUNT (Annie E. Casey Foundation):

<http://www.kidscount.org>

SMART (BRFSS City and County Data):

<http://apps.nccd.cdc.gov/BRFSS-SMART/>

### State

Sortable Stats (CDC):

<http://wwwn.cdc.gov/sortablestats/>

## Resource

The Prevention Institute highlights examples of worthy op-eds:

<http://preventioninstitute.org/focus-areas/reforming-our-health-system/projects.html>

## Op-Eds and Letters to the Editor

Smaller and local publications are more likely to publish your op-ed or letter to the editor. The odds improve when you submit a letter or op-ed that responds to an article, editorial, or recent op-ed or letter to the editor from someone else.

Remember to take advantage of free weeklies. They are starved for content and more likely to publish your letter or op-ed.

Don't over do it. Avoid flooding a media outlet with multiple letters to the editor (such as by creating a letter-to-the-editor and mobilizing coalition members to send it).

### Tips for Writing

- Be concise! Aim for 250 or fewer words.
- Be clear about any action you are requesting.
- Include a few sentences to explain:
  - » The overall issue.
  - » Local statistics, if available.
  - » Your committee and your process (establish credibility).
  - » Expected outcome.
- Follow the publication's guidelines.
- Consider ghost writing the letter or op-ed and then ask a key stakeholder to sign his/her name and submit. Media outlets consider the signatory when deciding whether to print a letter or op-ed.
- Always include full name and contact information, including degrees, organizational affiliation, title, and daytime phone number.

## Press Release

Press release elements also are fairly standardized and tend to use the following structure. See guidance in [Appendix A](#) for what to do with your media advisory.

-----  
*Letterhead or Organization Name*

### Press Release: Strong, Action-Oriented Title

Date

Contact Person

FOR IMMEDIATE RELEASE

Phone Number

E-mail

First Paragraph

- Who initiated the policy?
- What will the policy do?
- When and where will it take effect?

Subsequent Paragraph(s)

- Why is the policy being considered?
- What is the relevance of the policy to the community?
- Why is it newsworthy?

Last Paragraph

- What is your organization or committee?

*Example:*

*The [City] Health Advisory Committee was formed in 2010 to address the health needs of [City's] students by writing and recommending policy.*

- Who can they contact for information?

## Tips for Writing

- Be brief.
- Get to the point fast.
- Double space.
- Aim for one page, no more than two.
- Use quotes from local authorities where possible.

## Examples

SOPHE:

<http://www.sophe.org/Press.cfm>

American Public Health Association:

<http://www.apha.org/about/news/>

Trust for America's Health:

<http://healthyamericans.org/newsroom/>

## Prominent Social Media Sites

- Facebook:  
<http://www.facebook.com>
- LinkedIn:  
<http://www.linkedin.com>
- Twitter:  
<http://www.twitter.com>
- Wikipedia:  
<http://www.wikipedia.com>
- YouTube:  
<http://www.youtube.com>

## Evaluating Social Media

Use of Social Media in Health Promotion: Purposes, Key Performance Indicators, and Evaluation Metrics (Health Promotion Practice)

## Social Media

Engaging in social media is not optional today.

A lack of social media presence suggests irrelevance. Businesses, nonprofits, and governments use popular social media sites (see sidebar) as part of their strategic communications portfolios.

Within the health care and public health fields, a large number of social media sites are available for both consumers and professionals. In public health circles, Community Commons is a useful forum in which to participate: <http://www.communitycommons.org>.

Social media is synonymous with interactive, 24/7 online communities. As explained in **Chapter 3**, communications in social media are dynamic; thus, your policy education kit would not necessarily contain model blogs, a set of tweets, or a video library. Rather, you would generate these communications real-time using content in your policy education kit to expedite development. See **Chapter 3, Step E** for guidance with these tools.

### Tip

HootSuite offers an online platform for partners to collaborate on a communications campaign in social media: <http://www.hootsuite.com>

## References

Prevention Speaks, Wisconsin Clearinghouse for Prevention Resources. (2011). Speak to Inspire: Tips for Telling Powerful Stories. Madison, WI: Author. Available from: <http://preventionspeaks.org/tell-stories>

Schober M. (2010, April 7). Preventing Chronic Disease Action Kits. Powerpoint presentation at the State Health Policy Institute II. Atlanta, GA.

Stamatakis KA, McBride TD, Brownson RC. (2010). Communicating prevention messages to policy makers: The role of stories in promoting physical activity. Journal of Physical Activity and Health, 7(Suppl 1): S99-S107. Available from: [http://paprn.wustl.edu/pastprojects/Documents/Stamatakis\\_policymkrs.pdf](http://paprn.wustl.edu/pastprojects/Documents/Stamatakis_policymkrs.pdf)