State legislators are on the receiving end of an endless supply of advice and opinions. Whether while on the campaign trail or in the grocery store, whether about hunting licenses or health reform, everyone they meet is eager to tell them what they ought to do and how they ought to do it. As an EdTech leader, you might think that investing in technology is a no-brainer. But, if you think your great new idea is going to sell itself, think again.

Convincing lawmakers to fund technology isn’t easy. There are so many worthy educational initiatives which rely on public funding, it can be difficult for lawmakers to prioritize EdTech. Some read so much about technology in the news that they think schools are already well-equipped. Others are not convinced of its effectiveness or are concerned about the short shelf-life of newer devices.

The first step is to recognize that just having a good idea, is not enough. You will need an action plan and then you will need to take action. What action? When? How? What if you have never before worked with state lawmakers? How do you get started?

In June 2014, the Alabama Educational Technology Association, a CoSN chapter, began working on an advocacy campaign aimed at securing new technology funding for all Alabama public schools. In April 2016, nearly two years later, we succeeded. What follows are the lessons we learned and the recommendations we offer.
About the Author

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In it for the Long Haul

Newcomers often think that advocacy means supporting or opposing specific bills. They mistakenly believe that, win or lose, when the session ends, so does their advocacy. What they discover along the way, however, is that once you start down the advocacy path you can never really stop, and for good reason.

School systems depend on technology for nearly every function - instruction, operations, safety, business, data analytics, document retention, and more. Processes that haven’t already gone ‘digital’ soon will. This means that during each legislative session odds are that lawmakers will consider bills that impact school technology. Recent examples include bills focusing on student testing, virtual schools, data privacy, textbooks, security, and transparency. This is why you need to start your advocacy campaign not with the end in mind, but with no end in mind.

Who's in Charge of You?

State Educational Agencies (SEA) derive their authority from state constitutions and state statutes. Since the early 1800s, when they were first established, their roles have evolved. At a minimum, they are responsible for properly allocating funds, making sure those funds are spent correctly, and ensuring that school systems comply with state and federal laws. They also make recommendations for educational programs that will help ensure student success.

Considering the impact of technology on student success, you might expect it to be a high priority in every SEA budget, but this isn’t always the case. In fact, the more integrated technology becomes, the less it stands out as a separate funding need. On the surface, the elimination of a separate technology grant within the newly adopted Every Student Succeeds Act is alarming. On the other hand, ESSA encourages technology purchasing within each program, signaling that technology is no longer viewed as an isolated skillset that only supplements a good education. This shift in how the federal government funds technology may begin to change how states do so as well. For that reason, CTOs need to get busy encouraging their instructional counterparts at the district level to take advantage of ESSA’s technology provisions when building their budgets.

Chief Technology Officers (CTO) have a special interest in funding and policy matters as they relate to EdTech. It is fine for them to identify and pursue goals that are not included on the SEA’s annual priority list. After all, both organizations share the same ultimate goal, excellent educational opportunities for students.
Never Forget Who You Are

Officers of the organization should understand their state ethics laws, those that apply to educators and to legislators. For instance, there may be a law defining under what conditions a lawmaker can attend a conference or go on ‘exploratory’ trip. If your group intends to pay the expenses for legislators to do either, know the rules first.

The line between advocacy and lobbying can be fine and blurry. Most of the time, this will never become an issue, but if a bill gains traction and has a strong opponent, that opponent may start scrutinizing your members’ activity for potential violations. For this reason, every member should be educated about these laws before your advocacy activities get underway.

Advocacy in this context is not about supporting particular legislators in election campaigns. It is about promoting ideas that will better serve students and school districts. If your organization operates as a non-profit, then your officers and members should understand any IRS rules regarding political activities so as not to put that status at risk. Always remember that your organization will have to work with whoever is elected so there is no sense making enemies ahead of time.

As citizens, everyone is free to contact the legislators who represent their home voting district on any issue. In addition, ethics laws may allow school system employees to contact the lawmaker who represents their system even when it is not their personal representative or senator.

Mind Your Manners

Treat your state legislators with respect. Even if they belong to a different political party than you and even if you can’t stand what they stand for, be nice.

If you have an existing, toxic relationship with a particular legislator, you can either steer clear or try to bridge the divide. The best thing to do is to keep the goal in mind and make a fresh approach towards developing a good working relationship over that one goal.

You might have a bad impression of all ‘politicians.’ If you do, recognize that you are generalizing. Most lawmakers have very good intentions and a difficult job to do.
In or Out – Sourcing, That Is

Everyone expects big business and labor unions to have lobbyists, but they are not alone. Professional associations, universities, and state agencies, including your own SEA, hire or employ ‘governmental affairs’ staff. This helps the organization establish an ongoing means of communication with lawmakers about their needs. It also provides them with ‘boots on the ground’ in the state house so that they can quickly respond to ideas that either help or threaten their organization.

Hiring a lobbyist or employing a governmental affairs person might look like a shortcut to success, but there are drawbacks. The biggest drawback, even bigger than the expense, is the fact that once your organization hires a lobbyist your members may never really engage in the process. They will sit back thinking that the lobbyist will do it all for them.

The result could be that long-term relationships between CTOs and lawmakers are never established. In the end, most state lawmakers will listen to their constituents. One lobbyist will never be able to motivate as many legislators as will your active members.

You Can Learn a Lot from a Lobbyist

Lobbyists and governmental affairs people can be very helpful. If you are lucky, one or two will offer you a little mentoring or at least some words of wisdom. If they have been active in the state house for years, they will probably know a lot about the legislators. A little insight into whether a particular legislator likes facts or stories, likes to meet in their home district or at the state house, does or does not read email, likes to do all the talking, etc. can help you get off to a good start when building relationships.

One long-time technologist shared his conclusion as to why many legislators vote with their friends or don’t read every bill put before them. “They run for office very passionate about a few key issues. But once they have been elected they find out they have to vote on dozens or hundreds of bills they really have no interest or expertise in, and, that they will have to keep doing so for four years.”

State house dynamics can look a lot like junior high school. But what looks like a juvenile, histrionic, backstabbing, grudge match might just be camouflage for getting others to support or block a certain bill or amendment. Then again, it could be just a juvenile, histrionic, backstabbing grudge match.

Lobbyists close to the action can help you make sense of what looks like nonsense from the outside. They can fill you in on feuds, friendships, and alliances. For instance, if you know that junior Senator A will almost always vote the same way as veteran Senator B, then you can concentrate your efforts on B and hopefully get two votes with less effort. That same information can keep you from pulling your hair out when Senator A votes against your bill after assuring you a “yes” vote.
When to Start

Developing a successful advocacy campaign takes time. Identify and prioritize your goals at least six months before the legislative session opens. More than one goal is fine, but don’t expect to succeed with all of them in just one year. A good mix might be to concentrate your efforts on one goal, while laying the groundwork for another one, leaving time to react to unexpected bills that could impact your program.

Projects that require significant funding are always a challenge, particularly when state revenues are low. But don’t strike these from your list. Instead, evaluate whether or not the goal will still be relevant in a year or two. If the answer is yes, then begin mentioning it to lawmakers now, so that the support will be there when the state’s budget improves.

Tell Me What We’re Fightin’ For

After your Board has adopted its goals, the advocacy committee should develop supporting materials, including data and research. A whitepaper or presentation should be created explaining the specific ‘ask’, its impact, and the underlying rationale.

While you should keep the actual paper confidential, the ideas and data it contains should be presented to all other CTOs for feedback. Since no two districts are exactly alike, not everyone will jump onboard without question. Critical feedback, however, will be extremely valuable in finalizing the plan.

Regardless of whether you reach full consensus on each detail, everyone should agree to support the plan, or at least not speak out against it with lawmakers. The final version of your document can be used later with the bill’s sponsor and any allies.

To Share or Not to Share

Every ‘sharing’ decision you make should be strategic. You need to empower your supporters, while not empowering potential opponents. Be sure to think through each ‘share’ beforehand and check with your sponsoring legislator beforehand. Since it may take some time before you find out who your real supporters are, be cautious.

Don’t be too quick to jump onto the social media bandwagon. Tweets and Facebook pages can draw criticism in a very public way. A quick scan of the ‘comments’ posted after nearly every news article will tell you that people will say literally anything, most of it negative. Your campaign is not a plea for the public to get involved, so don’t invite them in except as a last resort.
It’s for the Children
Representatives and Senators come from all sorts of backgrounds. Some are adept at working with numbers and data, others get lost in them. Some like stories, while others get impatient. Many will focus on how the bills they vote on will affect the state. All will zero in on how the proposal helps or hurts their district.

Do Your Homework
Expect to be asked “Why?” a lot and have the answers ready. If you claim that parents favor your project, present data and anecdotes. If you assert that CTO salaries are woefully inadequate, prove it. If you claim the project will develop college and career skills, explain which skills and who wants them. If you claim school districts need more money and staff in order to protect against the growing digital threats, what evidence can you cite? If you say that your state has fallen behind or will become the first in some area, provide the basis.

Luckily, there are better data resources available to you than ever before. For instance, Project Tomorrow’s annual Speak Up survey is a great source for data about what parents, teachers, and students want with regard to school technology. CoSN has a whitepaper on CTO salaries. The Education Superhighway highlights major state initiatives and bandwidth rates across the country. Colleges and business councils use data all the time in their complaints about poorly prepared high school graduates. Find their data sources and use them to your own advantage. Finally, simply scanning the news headlines regarding technology trends and threats also produces good supporting materials.

National data provides a backdrop, but local legislators will want local data. SEA reports are local, but may be outdated or simply not helpful. If the data you need doesn’t exist, collect it yourself.
It is a good idea to create a document detailing the proposal and its supporting materials for a couple of reasons. First, over time, even members of your own group may challenge the plan and claim that they never ‘heard’ that you were asking for ‘x, y, or z.’ Second, when you eventually find a legislative sponsor he or she will need to have something to read and digest in order to thoroughly understand the proposal.

As you search for a legislative sponsor, explain the plan verbally, provide flyers of key points, but do not give any legislator the full written plan until you are certain that you are talking with the man or woman who will sponsor your bill.

Technology is a multibillion-dollar industry and public school systems represent big sales opportunities. Any technology proposal that involves funding will be on the radar of the tech industry’s local lobbyists in a heartbeat. It’s a sure bet they will try to influence legislators in ways that change the proposal to favor their employers.

When identifying a sponsor, your first inclination may be to contact legislators who have previously introduced technology bills. However, just because a legislator has put his or her name on a technology bill does not mean that he or she came up with the idea or wrote the bill.

EdTech is big business. Technology and telecom companies are happy to sponsor legislators’ attendance at conferences, invite them to their company headquarters, take them on exploratory trips to show off their success stories, and, yes, even help them write bills. If done in accordance with state ethics laws there is nothing wrong with this, but that doesn’t mean it won’t cause problems for your advocacy plan or even your school system.

One problem that can arise happens when one big tech company spots a bill that funds a competitor’s products to the exclusion of their own. A battle between lobbyists begins and can end with the bill being delayed or even killed. This is why it is a good idea to keep even your own sponsors from becoming involved in your advocacy plans. Another problem can occur when the vendor-sponsored bill calls for purchases so large that you will not be able to roll them out in the expected period, or when the expected purchases are incompatible with your network. It will look like a great move on the legislature’s part, but it can make you look like a failure.

Tech lobbyists may not be in the state house every day, but when a big technology bill is introduced, you can expect them to show. Telecom lobbyists, on the other hand, are practically fixtures. They may be working on issues unrelated to EdTech, but their ears are always open and they will zero in on anything that could impact their client’s business such as bandwidth needs.

Find out who the big technology and telecom lobbyists are and know them on sight. Be friendly, but never forget their primary goal is to help their employer, not your schools. If you start suggesting modifications to a bill that they’ve had a hand in and these changes have a negative impact on their bottom line, they might not be shy about criticizing your ideas or your expertise. They might not do it openly, but they will do it.

Not That There’s Anything Wrong with That
**Keys to the Kingdom**

Most state legislatures have standing committees dedicated to examining public education budget proposals from the governor or SEA. They may also have standing House and Senate committees that focus on educational policy. A list of “standing committees” will be on your state’s website.

Legislators expect the members of any given committee to be the best informed about the bills they send to the floor for a vote. Therefore, the members of these two key committees can become inside advocates for the bills that you support. If you oppose a bill, you can request a public hearing so that you can speak before the committee on the issue. Getting a bill changed or killed in committee can be a better strategy than waiting until it goes to the chamber floor for a vote and then asking for nay votes.

**Identify the chairpersons and members of key committees each year. Then, match them with the members of your organization who live or work in their voting districts. These members will play an important role throughout the campaign.**

Convincing committee chairpersons to sponsor a bill won’t guarantee success, but having them oppose it can ensure defeat, if, for no other reason than they have power over the committee’s agenda.

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**Forming Alliances**

If lawmakers are not familiar with your group, forming an alliance with a well-known, like-minded group can get you off to a good start, especially if they have a governmental affairs person in the state capitol during the session.

You do not need to form alliances with every educational association out there, nor should you. Remember, you will be competing with most of them for funding and priority on the calendar, so this probably isn’t even possible. Only form an alliance if your proposal is as important to them as it is to you and they have a reasonably good working relationship with lawmakers.

Finding out about the advocacy plans of other organizations will be very useful in determining which of them might make good partners. Even if you decide not to form a partnership, you will need to identify any direct conflicts between your goals and those of other groups.

Start by making a list of known educational associations such as for teachers, parents, superintendents, principals, library media specialists, school boards, etc. In addition, find out the name of the major state business council and check its website to see what their major concerns are for the year.

Some organizations will be state chapters of national organizations. Some will publish their ‘issues’ on their websites, others won’t. Since most of them will all be fighting for the same funding as your group, it will pay to find out what their priorities are even if you have to make a few phone calls to do so.
Reading ---

Every year dozens of bills, some serious, some silly, are introduced. The official format and language required can seem archaic and can be hard to follow, especially when a bill is an amendment to previously passed law. Bills do not make for easy reading.

Before getting all huffy about lawmakers not reading every bill, consider the fact that most bills never make it out of the committees in which they were introduced. It is also fair to say that lawmakers are too busy to read every bill introduced. They put in long days meeting with constituents and lobbyists, working on their own bills and attending committee meetings and floor sessions, some of which last late into the night.

You could expect them to read every word of each bill that makes it to the chamber floor, but that is still a ton of reading. Unless a bill is of particular interest to them or threatens another bill they favor, they are as likely to take a fellow lawmaker or lobbyist’s word about it as they are to read it word for word. This is why you should 1) have already provided them with a series of easy to read infographics about your proposal and 2) use this in your favor by convincing the more powerful members to encourage other members to vote for the bill on trust.

Writing ---

It is not hard to spot bills born in political think tanks. Just paste any set of significant phrases into a search engine and look at the results. You will often see the exact same bill introduced in other states. Bills about digital privacy are good examples.

The correct format for bills is not like what you learned in school. There are sections and chapters and numbers and letters, but it is a style all its own. Lobbyists and their staffs are well versed in bill writing, as are political think tanks. It is not unusual for a lawmaker to come up with the intent of the bill and ask a lobbyist or governmental affairs person to write it. This should not bother you, because that means you will get a stab at crafting the actual language in the bill for your proposal.

Arithmetic ---

Every legislator wants to help his or her district. For funding bills, be sure that whatever formula you develop, whether by enrollment or other factors (poverty, urban/rural, etc.), that it is easy to explain and fair. Your group’s members should understand the formula and agree to it before it is included in your proposal. Statewide initiatives should be broken down by how much money or other ‘material benefit’ each school system will receive.

Create a database that associates each state representative and senator with the school system(s) that lie within their districts. (Because school district and legislative districts overlap, some school districts will be associated with multiple legislators and vice versa.) Then calculate the grand total for each legislator. You can give this report to your bill’s sponsors to use in promoting their bill.
Don’t rely on form letters, email blasts or robocalls to get the job done. They might be fast, but state legislators despise them. They respond much better to personal messages from constituents whom they know or are getting to know.

So Many Bills, So Little Time

Every year dozens of ‘good’ bills die without ever coming up for a vote. The main culprit is the shortness of the legislative session. In only a few months’ time, lawmakers must develop, introduce, debate, and pass major budgets as well as consider dozens of additional bills on critical issues.

If only a few lawmakers are interested in a bill, it may never make it onto committee or floor agendas. This is why all of your members need to be well informed and enthusiastic about your proposals.

Short and Sweet

All written materials explaining the project should be short, simple, and interesting. Use graphics. Legislators will always have people lined up outside their door waiting to see them. Plus, they have a lot of reading to do. Your material must be attention getting and easy to digest. If they are not the sponsor of the bill they are not going to want to read a 12-page whitepaper filled with charts and graphs.

Make your point in a one-page flyer. Infographics work well. When using a series of flyers, create a common logo or include a reference to the bill’s number so that lawmakers understand that it is a single bill explained in different ways, not different bills. Finally, don’t forget to adhere to all copyright rules.

Legislative sessions last several months. Your bill won’t be the first bill on the agenda, so plan for a sequence of flyers to release at different times.

If possible, your members should hand-deliver the first flyer. This will give them a reason to meet with the legislator and provide them talking points if they are nervous. Later, use modified versions of the flyer to remind legislators of what a great project it is by highlighting different benefits. You want them to read each one so that they can build their familiarity with the goal, its cost, and its benefits. Get your sponsor’s feedback on the content and advice on when to release each flyer.

Stamp of Approval

As the session progresses and other groups learn about your proposal, begin asking them what they think of it. Then, if you think their support will be helpful, you can ask them for an endorsement. They can do so in face-to-face meetings with individual legislators or in public hearings. Affirmations from teacher groups, school boards, superintendents, business councils, and even student groups can help to persuade lawmakers that the proposal is for the good of education, and not just technology for technology’s sake.

Endorsements are different from alliances. An ally is going to fight the battle with you, or at least share information with you to help you along. An endorsement is more of a ‘me too’ proposition, where other well-respected players make it known that they would like to see the project adopted and state their view of its benefits.
If you are brave enough to shop on Black Friday, you are ready to take on the halls of your state house during the session.

Pay attention to the normal schedule for committee meetings and full floor sessions so that you will have a good chance of getting to speak with your legislators.

Stay tuned to the news to find out if some other group plans a big protest on the day of your visit.

Regardless, wear comfortable shoes and practice your slalom moves because you are likely to do a lot of standing and maneuvering.

At least once each legislative session, your group should plan to visit their lawmakers. Planning an organizational meeting prior to the actual visits to review talking points before heading to the state house will go a long way in making members more relaxed and prepared.

Do like the pros and make appointments with your legislators. If you are from their district, they will meet with you, but don’t expect things to stay on schedule. Floor sessions and committee meetings, especially those with public hearings, can run into overtime.

Big Love

You might think that if your bill becomes popular with both the Senate and the House, you are home free. You assume that it will move swiftly through the process and be on the Governor’s desk for signature in a matter of weeks. As any celebrity can tell you, being incredibly popular has its downside.

Disagreements between the political parties and between the two Chambers are to be expected. If your bill becomes very popular, it just might be ‘held hostage’ by one side or the other as a strategy to get some other bill changed, killed, or passed. Go figure.
The Deadly Dozen

Your bill’s prospects will improve with widespread geographical support because floor votes involve legislators from every corner of the state. Having proponents from across the state can also reduce the chances that your bill will fall victim to regional feuds or ongoing urban-rural debates. Finally, you never really know which legislators could be influential in moving the bill forward at any given juncture because there is always a lot going on behind the scenes.

Your members should be ready and willing to contact their Senators and Representatives whenever the bill needs a push because a bill won’t become a law if:

1. It has no sponsor and is never introduced;
2. It is introduced, but never makes it out of committee;
3. It makes it out of committee, but is not added to the agenda for a floor vote;
4. It gets a floor vote, but fails;
5. It passes a floor vote, but subsequently becomes stuck in the committee of the opposite chamber (House or Senate) because no one on that committee is interested in it;
6. It is passed by the new committee, but fails to get on that chamber’s agenda for a floor vote;
7. It is added to the chamber’s floor agenda, but fails to pass;
8. It is passed by the new committee with amendments, is passed on the chamber floor as amended and then is returned to the originating chamber for consideration which rejects the amended version;
9. The amended bill is passed by the originating committee, but then is either never added back to the floor agenda or is added, but then fails a floor vote;
10. Amended versions of the bill ping-pong back and forth for so long that the session ends before a compromise version is passed by both chambers;
11. A filibuster occurs on the last day of the session and the bill never makes it to a floor vote;
12. The bill passes, but the governor refuses to sign it into law.

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i Education Encyclopedia, [http://education.stateuniversity.com/pages/2447/State-Departments-Education.html](http://education.stateuniversity.com/pages/2447/State-Departments-Education.html), as accessed on June 20, 2016


iv John M. Wade, CEO Alabama Supercomputer Authority

v Project Tomorrow, [http://www.tomorrow.org](http://www.tomorrow.org), Project Tomorrow is a national education nonprofit organization with a 19 year history of impacting education.

vi Consortium for School Networking (CoSN), [http://www.cosn.org](http://www.cosn.org), The Consortium for School Networking is the premier professional association for district technology leaders.

vii Education Superhighway, [http://www.educationsuperhighway.org](http://www.educationsuperhighway.org), Education SuperHighway is the leading non-profit focused on upgrading the Internet access in every public school classroom in America.