PRESENTING RESEARCH TO DECISION MAKERS FOR ACTION AND RESULTS

A RESOURCE GUIDE FOR ADVOCATES 2014
PRESENTING RESEARCH TO DECISION MAKERS FOR ACTION AND RESULTS

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PRESENTING RESEARCH TO DECISION MAKERS FOR ACTION AND RESULTS
INTRODUCTION

This publication is a resource guide for advocacy efforts aimed at affecting laws, policy, and executive actions. It will help you to:

1. Create effective, data-rich communications that are read, remembered, and referenced,
2. Increase the likelihood that your proposed policies are heard and considered by policymakers, and
3. Establish and maintain effective relationships with policymakers, and relevant stakeholders.

Within this guide, there are five chapters focused on best practices for advocacy efforts using evidence-based research.

- **Chapter One** establishes working definitions of education, advocacy, and lobbying for the benefit of organizations with lobbying restrictions.
- Before organizations seek to advocate a new law, policy change, or executive action, **Chapter Two** provides a checklist to be considered.
- **Chapter Three** discusses strategies employed by effective practitioners to get their policy proposal on a policymaker’s radar.
- **Chapter Four** provides best practices on how to draft documents for decision makers inundated with information and little time to gain an intuitive understanding.
- **Chapter Five** elaborates on how to effectively use Social Math and Infographics to create a lasting narrative using evidence-based data.

ACKNOWLEDGEMENT

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DISCLAIMER

This publication shall not, in any way or interpretation, be construed to constitute legal counsel regarding advocacy or lobbying at any level of government. Legal counsel should always be sought to ensure compliance before executing any such activity.
“For only as men are brought into counsel, and state their own needs and interest, can the general interests of a great people be compounded into policy that will be suitable to all.”

Woodrow Wilson, the 28th U.S. President
CHAPTER ONE: EDUCATING, ADVOCATING & LOBBYING

All U.S. citizens and organizations have the right to influence the democratic process through acts of advocacy. Indeed, the democratic process is bettered by their participation because lawmakers are elected to protect the needs and interests of said citizens and organizations. Yet, lawmakers do not control sufficient resources to supply all of the facts, figures and projections they need to write foolproof policy. When asked to describe how organizations can be a resource to government representatives, a Congressional Chief of Staff simply stated “Members feed off of information.”

There exists means to provide information to lawmakers. Organizations seeking to influence policy or become a resource to policymakers will look to engage in one or more of the following activities: Education, Advocacy, and/or Lobbying.

but you may not reference any existing, proposed, or pending legislation. You also may not promote the introduction of a new piece of legislation. This nuance regarding legislation is key, as it separates advocacy from lobbying.

LOBBYING is any activity designed to deliver factual information 1) with an expressed value judgment, and 2) with references to a specific policy or legislative action. Said legislation may be existing, proposed, or pending at the federal, state, or local level; or it may be a public ballot initiative (for example, a public referendum). Any call for the introduction of a new, specific legislation is also a lobbying act.

Please note that while these are common definitions, Federal, State, and Local laws all have different definitions, requirements, and restrictions that are not static. Legal counsel should always be sought to ensure compliance before engaging in any of these activities.

Organizations with a 501(c)(3) status are prohibited by the IRS from dedicating a “substantial” part of their activities to lobbying (more details below). Therefore, it is vital to understand the difference between education, advocacy, and lobbying so one’s tax-exempt status is not jeopardized and penalty fees are not incurred. Here are a couple of examples to help you understand and clarify the differences among these three actions.

<table>
<thead>
<tr>
<th>FACTUAL</th>
<th>EXPRESSES VALUE JUDGMENT</th>
<th>REFERENCES SPECIFIC POLICY</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDUCATION</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>ADVOCACY</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>LOBBYING</td>
<td>YES</td>
<td>YES</td>
</tr>
</tbody>
</table>

EDUCATION is any activity designed to deliver factual information 1) without expressing a value judgment and 2) without referencing a specific policy or legislative action. These two distinctions are important, as you will see below.

ADVOCACY is any activity designed to deliver factual information 1) with an expressed value judgment, but 2) without reference to a specific policy or legislative action. Stated another way, during acts of advocacy, you may print positive or negative statements regarding the issue you present, but you may not reference any existing, proposed, or pending legislation. You also may not promote the introduction of a new piece of legislation. This nuance regarding legislation is key, as it separates advocacy from lobbying.

NOT KNOWING THE DIFFERENCE CAN JEOPARDIZE YOUR TAX-EXEMPT STATUS

Organizations with a 501(c)(3) status are prohibited by the IRS from dedicating a “substantial” part of their activities to lobbying (more details below). Therefore, it is vital to understand the difference between education, advocacy, and lobbying so one’s tax-exempt status is not jeopardized and penalty fees are not incurred. Here are a couple of examples to help you understand and clarify the differences among these three actions.
Presenting Research to Decision Makers for Action and Results

Nonprofit organizations may conduct educational forums, or prepare and distribute educational materials without jeopardizing their tax-exempt status or incurring penalties. Nonprofits also may execute letter-writing campaigns or host day-trips with residents to meet with policymakers for the sake of advocating a non-specific policy direction without jeopardizing their tax-exempt status or incurring penalties. Simply put, for-profit and nonprofit organizations are permitted to educate and advocate without restrictions. Lobbying, however, is different.

Nonprofits Can Lobby

It is a widespread fallacy that nonprofits are completely prohibited from lobbying as defined above. Nonprofits, even organizations exempt under Internal Revenue Code 501(c)(3), are permitted to lobby—as long as their lobbying efforts do not constitute a “substantial” part of their overall activities. When defining “substantial” the IRS uses a “Substantial Part Test” and an “Expenditure Test” to determine acceptable levels of lobbying. These rules and requirements are discussed below but are continually updated and can be found on www.irs.gov.

Substantial Part Test

If seeking to operate under the Substantial Part Test, organizations will find that there is no statutory or regulatory definition of what constitutes a “substantial” amount of lobbying. Unfortunately, to

Example One: Lead-Contaminated Drinking Water

- A nonprofit seeking to Educate may notify policymakers about the causal relationship between lead-contaminated drinking water and an increase in miscarriages.
- That organization also may Advocate for a change by expressing to State lawmakers that an increase in miscarriages is a problem that needs to be remedied by eliminating lead-contaminated drinking water. The submitted correspondences and interactions with lawmakers would not mention a particular piece of legislation nor would the organization specify what a new piece of legislation should include, if introduced.
- If the organization were to urge policymakers to vote “yes” on pending legislation that increases funding to the State’s water authority to eliminate lead in drinking water, then the organization would be engaging in Lobbying.

Example Two: Growing Homelessness

- In an effort to Educate the public about the growing problem of homelessness in a particular jurisdiction, a nonprofit organization may send mailings to voters showing a graphical timeline highlighting an increase in the area’s homeless population.
- Another mailing by the organization may Advocate for a change by stating that the increase in the City’s homeless population is a problem and voters should email their representatives to demand a non-specified solution (for example, “Urge your Councilmember to act now!”).
- In a separate mailing, if the organization asks voters to email their representatives and demand an increase in per capita spending for affordable housing, then this is Lobbying. The organization has proposed a specific legislative solution.

Lobbying with Restrictions

How do I advocate for improved public policy when my organization has lobbying restrictions?

25%
Amount of tax levied on organizations’ excess lobbying expenditures when they have engaged in excessive lobbying

Does not apply to churches and private foundations.
date the IRS has not offered clear guidance on the point nor set any threshold that an organization must not exceed. Instead, it considers facts and circumstances on a case-by-case basis and considers "a variety of factors, including the time devoted (by both compensated and volunteer workers) and the expenditures devoted by the organization to the activity." Given the vagueness of the Substantial Part Test, some organizations may prefer a more concrete way to determine an appropriate level of lobbying. Such nonprofits may alternatively elect to be governed by the IRS Expenditure Test, a mathematical formula that limits the amount a 501(c)(3) may spend on lobbying activities.

The IRS Expenditure Test
As of April of 2014, the IRS Expenditure Test is as follows:

<table>
<thead>
<tr>
<th>IF THE AMOUNT OF TAX-EXEMPT PURPOSE EXPENDITURES ARE:</th>
<th>THEN LOBBYING NONTAXABLE AMOUNTS ARE:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than or equal to $500,000</td>
<td>20% of the exempt purpose expenditures</td>
</tr>
<tr>
<td>Greater than $500,000 but less than or equal to $1,000,000</td>
<td>$100,000 plus 15% of the excess of exempt purpose expenditures over $500,000</td>
</tr>
<tr>
<td>Greater than $1,000,000 but less than or equal to $1,500,000</td>
<td>$175,000 plus 10% of the excess of exempt purpose expenditures over $1,000,000</td>
</tr>
<tr>
<td>Greater than $1,500,000</td>
<td>$225,000 plus 5% of the exempt purpose expenditures over $1,500,000</td>
</tr>
</tbody>
</table>

For example, if a nonprofit organization spends $600,000 within one tax year for “tax-exempt purpose expenditures,” then the maximum amount it can spend on lobbying is $115,000 ($100,000 + 15% of $100,000, the excess of the exempt purpose expenditures over $500,000). Lobbying expenditures above $115,000 will result in penalties and possibly the loss of the organization’s tax exempt status.

Lobbying Exemptions
Outside of the Substantial Part Test and the Expenditure Test, there are additional lobbying exemptions of which organizations should be aware:

One: A nonprofit’s communication about a specific legislation is excluded and is not considered lobbying if the communication is about a possible decision that might affect the existence of the organization, its powers and duties, its tax-exempt status, or the deduction of contributions it receives.

Two: Any communication about a specific legislation is excluded from an organization’s lobbying efforts if one lobbies as a private citizen. This is permissible, as any citizen may voluntarily express her/his views to policymakers. However, take extra precautions. Take a vacation day from the office, use your own personal equipment and materials (including your own cell phone, computer, and stationary), communicate with policymakers on your own time, identify yourself as a constituent, and record when, where and what you did as a private citizen to communicate with the elected official.

ADDITIONAL RESOURCES
Because Federal, State, and Local laws and regulations have different definitions, requirements, and restrictions, learn what specific definitions apply to your circumstances and proactively monitor legal definitions because laws and regulations about education, advocacy, and lobbying constantly evolve. Below are a couple of resources to assist you:

- The IRS has published articles for its IRS Continuing Education Program for Exempt Organizations Specialists. The articles provide examples and elaborations on tax rules for nonprofits: http://www.irs.gov/Charities-&-Non-Profits/Exempt-Organizations-Continuing-Professional-Education-Technical-Instruction-Program
“It’s simple. The system works with who’s down there pressuring, who’s showing up, and who’s advocating for themselves. That’s the way this democratic system works. It’s a simple kind of thing...Democracy works but you have to participate.”

Reverend Jim Dickerson, Founder of Manna, Inc. in Washington, DC.
CHAPTER TWO: WAIT! COMPLETE THIS CHECKLIST BEFORE CONTACTING POLICYMAKERS

Before you begin your advocacy efforts, proper due diligence is essential. The effectiveness of an advocate rests almost entirely on the reliability of the information she/he presents. Therefore, use the checklist below to help you properly prepare for productive engagements with lawmakers:

Affirmatively answer the following questions regarding evidence of the problem you seek to correct:

☐ Is there evidence of the problem?
☐ Is the evidence from a reliable and trustworthy source?
☐ Have you double-checked your sources?

Affirmatively answer the following questions regarding the need for a new policy:

☐ Have you researched to make sure policies related to the problem do not already exist?
☐ If policies already exist, do gaps exist between your evidence-based policy recommendation and the existing policy?

Affirmatively answer the following question regarding who are the best decision makers to target:

☐ Have you researched to see what agency, entities and decision makers have jurisdiction over the policy area?

Affirmatively answer the following question regarding the views and opinions of the relevant decision makers:

☐ Have you researched to see if the target decision makers have stated her/his viewpoint on your proposed policy or anything similar?

Affirmatively answer the following questions regarding evidence that supports your suggested policy’s proclaimed effectiveness:

☐ Is there evidence supporting your proposed policy?
☐ Is the evidence from a reliable and trustworthy source?
☐ Have you double-checked your sources?
“The one really great way to connect with a Member is to do it on a District-level. So, if you can, find someone in the Member’s District, a constituent, who can relate to the Member about an issue. The Member is not going to ignore a constituent.”

Lanier Avant, Chief of Staff, Office of U.S. Congressman Bennie Thompson
CHAPTER THREE: BE SEEN! CONTACTING & MEETING WITH POLICYMAKERS

What motivates policymakers?
Understanding the answer to this simple question impacts your ability to get on a lawmaker’s calendar and your issue on their radar. Public policymakers are extremely busy people. As part of their job, they are regularly subjected to a large number of communication attempts by individuals and organizational representatives seeking to obtain resources or to influence policy. For example, some U.S. Congressional Offices receive 200 meeting requests a week. Based on sheer volume alone, most meeting requests are denied.  

97%
Percentage of Congressional staff who said constituent visits to the Washington office have “some” or “a lot” of influence on an undecided Legislator—more than any other influence group or strategy.  

USING CONSTITUENTS
So, how should you go about contacting lawmakers to increase the probability of having your meeting request accepted? In the U.S. Congress, senior managers and staff indicated that their preferred ways of obtaining information were in-person visits from constituents, contact from a constituent who represents other constituents, individualized postal letters, and individualized email messages. Simply stated, constituents are what motivate policymakers. When identifying best practices used to influence policy, Sarah Scruggs, Director of Advocacy for Manna, Inc. in Washington, DC, noted that “You want to bring in people who care about the issue you’re talking about and who may have the ability to vote for that [lawmaker]. People are always thinking about staying in office.”  

USING COALITIONS
Another way to effectively maximize the use of constituents is to join a coalition, or to create one. Benefits include the ability to share costs, information, and skills; but, most importantly, you gain the ability to show strong support for a policy stance by a lawmaker’s constituency. Bob Pohlman, the Executive Director of the Coalition for Nonprofit Housing and Economic Development, in Washington, DC stated the following:

“We would not have the results that we have achieved without the Coalition, without a large number of members…Doing it together is much stronger than doing it alone as a single nonprofit organization that goes down there and tries to advocate for something. The reason is, with the grassroots advocacy, we have like 2,500 supporters—and they’re voters. Any politician looks at that and says, ‘there’s a lot of people behind this.’”
**BUILDING RELATIONSHIPS**

Beyond partnering with constituents, the interpersonal relationship between the advocate and the elected official can be critical in determining the success of one’s efforts to effectively relay information and influence policy. “Gatekeepers,” such as legislative aides or executive secretaries, also play a key role in determining which people, and to what information policymakers are exposed. Therefore, establishing a positive relationship with the gatekeepers is critical as well. Ideally, this involves developing long-term relationships with both the policymaker and her/his staff when your agenda item is not pressing. Indeed, the most common mistake made by advocates is not developing long-term relationships and then waiting until decisions are immediately needed.

“Many organizations will approach Members at the last minute and try to a) get their point across about the subject at hand, [and] b) try to introduce themselves. And it’s tough to introduce yourself and also have some weight or have any bearing on the outcome of the policy, because…for someone to show up at the last minute…[it] may be perceived as a lack of respect for [your proposed] position…or a lack of interest.”

— Lanier Avant, Office of U.S. Congressman Bennie Thompson

In summary, here are some **SIMPLE RULES** to follow when contacting policymakers and building relationships:

1. **Partner with constituents.** Lawmakers are overwhelmed by meeting requests; therefore, it is advisable to go beyond having accurate data that informs them—you must show constituent support as well.

2. **Get in early.** Do not wait until it is time for the lawmaker to make a decision or take a vote. By that time, it may be too late. Build your reputation as a reliable source of information well in advance and have your position made known.

3. **Make multiple visits.** Build a stronger relationship by visiting policymakers from time to time. As stated by a Congressional staffer, “…you can never take your ally for granted. You have to show them the respect of at least trying to get to see them. Let them say, ‘it’s a waste of time, I am already with you.’” Successful advocacy must be a long term proposition. Few, if any, legislative issues are settled in a single visit to a policymaker’s office.

4. **Learn what legislators care about.** Most legislators already have goals based on their own conclusions or views of their constituents’ interests. Learn these views as you relationship-build and try to tie your advocacy efforts to them.
MEETING WITH POLICYMAKERS

Once an advocate has successfully implemented the steps above and their meeting request has been accepted, the advocate will typically meet with a legislator’s staff. If this happens, treat these Gatekeepers as though they are the policymaker themselves and extend to them the same courtesies. Indeed, they determine if and when your information is relayed. However, depending on your issue and the relationships and/or constituents brought with you, the legislator may be a part of the meeting. This is the prime venue for you to make the most impact.

Here are some SIMPLE RULES to follow when meeting:

1. **Get to the point.** Legislators are busy and do not have much time. It is always good to be cognizant of their time demands and be brief as well as confident in the meeting.17

2. **Be accurate.** When asked a question, answer it without guessing. If you are not sure or do not know the answer to a question, then inform the legislator that you will get back to her/him.

3. **Do not overstate the data.** The desire to persuade policymakers may tempt advocates to downplay, exaggerate, over-interpret, or imply greater certainty to the research than is justifiable. Your message must be defensible by the data and not presented in misleading ways that could potentially result in lawmakers making inappropriate or dangerous decisions.18

4. **Have a conversation.** A former congressman once stated, “I think one thing that separates us from corporate people is that they just love presentations. We hate them. We don’t have time for slide-showarama.”19 Instead, use a conversational approach when meeting, but also try to find out beforehand your targeted lawmaker’s preference between presentations and conversational approaches.

5. **Know what you need and ask for it.** An advocate needs to be clear on what she/he is asking from the legislator. Before your meeting is done, make sure you have explicitly and clearly stated what you need the policymaker to do.

6. **Negotiate and compromise.** As an advocate, being bullheaded and uncompromising can lead to the loss of a potential supporter and ally. Lawmaking often requires compromise and lawmakers will expect advocates to understand that and to be flexible when necessary.

7. **Follow up on everything.** If you say you are going to do something, make sure you do it. Following up is important as it helps build credibility.20
“If you can’t explain something simple, you don’t understand it well. Most of the fundamental ideas of science are essentially simple, and may, as a rule, be expressed in a language comprehensible to everyone.”

Albert Einstein
Policymakers and their staff have limited time to digest the volumes of information that enter their offices each day. In a recent study, state legislators, legislative staff, and agency heads indicated they “never get to” 35 percent of the material they receive. Of the materials they do review, respondents noted that they skim 53 percent of it for general content and only read 27 percent of it for detail.\(^\text{22}\)

**KEEP IT CONCISE AND TO THE POINT**

So, how do you improve the chances of having your submitted documents read in detail? First, as stated in the previous chapter, keep your documents concise. There exist multiple reasons why your submitted materials to lawmakers should get to the point, not the least of which is the consideration of the way the brain retains information. Research has shown that the capacity of individuals to process large amounts of information at one time is quite limited. For example, studies suggest that people can optimally retain only 7 (±2) new pieces of information at a time.\(^\text{23}\) This means that simply presenting complex data or long, dense paragraphs will likely lead to mental overload and a loss of data by the reader. This is especially true for lawmakers. People who are time-pressured and need information on a topic for a specific, immediate task expend limited amounts of mental energy to obtain information until they believe they have “enough” for a particular purpose. Quite simply, when busy people look for information to make a decision, they often cannot afford to expend the mental energy needed to process data in deep, expansive ways. They look for the bottom line, the gist of what the information is telling them.\(^\text{24}\) That is why it is important to keep printed materials concise and to the point.

To further increase the probability of having your documents read in detail, here are some **SIMPLE RULES:**

1. **Use bullets and graphs.** When surveyed, state lawmakers and their staff said they are more likely to read information presented in short, bulleted paragraphs rather than documents with large blocks of text. They also identified the use of charts or graphs as being a determining factor. As one staffer said, “If you give me bullets and a chart, I can ‘get it’ and pass it on to my boss without rewriting it.”\(^\text{25}\)
2. **Lead with the most compelling statistic.** Identify your most impressive data point and state it early. People have a tendency to be anchored by the first number they have in mind. Any adjustments they make are strongly influenced by that initial value.\(^{26}\) This may result in mental overload and a loss of data by the reader.

3. **Make it relevant.** Before you provide any materials to lawmakers, make sure the targeted lawmaker is the appropriate person to address your issue and then connect the issue with something the policymaker cares about. Despite this important aspect of advocacy, surveyed policymakers estimate that 49 percent of the information they receive is not relevant to their current work.\(^{27}\)

4. **Make it easy to read with headings.** Headlines, headings, and subheadings should be used effectively. They should be bold, concise and presented in a hierarchical order that allows readers to scan materials quickly and then drill down for details as needed.\(^{28}\)

5. **Do not use acronyms in headings.** Even if an acronym is explained elsewhere in the document, it will slow down readers as they are forced to search for the meaning of the unknown term before coming back.\(^{29}\) This may result in mental overload and a loss of data by the reader.

6. **Simplify the data.** When expressing numbers, frequencies and percentages are likely to be good choices and understood by most audiences. However, fractional percentages, such as 0.4% or 0.001% should be avoided, as they are very likely to be misunderstood. Rounding numbers (for example, 25,000 rather than 24,961) and avoiding unnecessary levels of precision (60% rather than 59.7%) are also recommended.\(^{30}\)

7. **Don’t write out numbers.** Although this recommendation contradicts traditional writing style guidelines, do not spell out numerical values in your submitted document to lawmakers. Using special equipment to track the eye movement of users looking at websites, researchers noticed that “numerals often stop the wandering eye,” because in most people’s minds “numbers represent facts.”\(^{31}\)
7(±2) Number of distinct new pieces of information the human brain can optimally retain at one time.
“The numbers speak for themselves.”

Common misstatement that no advocate should believe
When presenting evidence-based data, the advocate’s objective is to increase understanding and information retention with minimal effort expended by the reader. To do this, effective advocates will not present data with the expectation of just letting the “the numbers speak for themselves.” Instead, the effective advocate gives meaning to the data and connects it to the reader. These efforts commonly include the use of Social Math and Infographics. Social Math is the process of using narratives to make data easier to understand and remember by relating it to things readers already understand. It attempts to connect the data with its audience by answering the unspoken question, “what does this mean for me?” Infographics, visual representations of data, are similarly used to make information memorable by using attention-grabbing images that place the data in a recognizable context.

**SOCIAL MATH**

Social Math is simply making data easier to understand by relating the unfamiliar to the familiar. For example, let us look again at our examples from Chapter One.

**EXAMPLE ONE: Lead-Contaminated Drinking Water**

- During the time that lead levels were dangerously high in the City’s drinking water, fetal death rates spiked to 13 per 1,000 births a year—that is equivalent to wiping out the entire student body at Turley Elementary, the largest elementary school in the City.

**EXAMPLE TWO: Growing Homelessness**

- The average rent for a one-bedroom apartment in the City has now reached $2,000 a month—just ten years ago that amount would have covered the monthly mortgages on not just one, but two homes in the City.

Social Math is important to the advocate because legislators need research that is explained in a way that can be relayed to others with a focus on how it affects them. Thus, given the need to make data accessible to many, organizations should stay mindful of the general audience’s level of quantitative literacy—the ability to perform basic arithmetic. For instance, it has been shown that quantitative literacy is low in America—across all levels of educational attainment. On the low-end, almost two-thirds (64 percent in 2003) of adults who did not graduate from high school have a below basic level of proficiency in mathematical tasks. On the high-end, only about a third (36% in 2003) of graduate degree recipients scored “proficient” on quantitative performance tests. What this means is that the general public as well as policymakers, as most of them have advanced degrees, maintain only a basic or intermediate level of familiarity with mathematical concepts. Therefore, care should always be taken to explain the meaning of data and put it into a context that is easily understood. Social Math becomes a key tool in this regard.
INFOGRAPHICS

The first known graph using economic data was done by William Playfair in The Commercial and Political Atlas, published in 1786. In this book of 44 charts (including the one to the right), Playfair started what we today call Infographics. Infographics are visual representations of data used to capture an audience’s attention while also making the information easier to understand and remember. In The Commercial and Political Atlas, after having created a better way to display big-data than with the use of number-filled tables, the prideful Playfair noted that drawings can display information with near-perfect accuracy while also giving the reader a “distinct impression” about the data that is retained for a considerable amount of time.33 This is a valuable tool for the advocate seeking to impress a lasting idea on a policymaker who can only devote a limited amount of time and mental capacity to the presented material.

As great of a tool is the Infographic, most often it is not used effectively by practitioners. For example, when contemplating what elements an Infographic should have to make it memorable and attention-grabbing, one may easily conclude it should be elaborate and grandiose. However, this is one of the most common mistakes made. Quite the opposite is true. Advocates should keep Infographics concise and simple. As previously discussed, when data is presented in formats that are difficult to understand, information fails and it is less-likely to be remembered. In contrast, infographics that work best are ones that do not present audiences with too much data and allow the readers to easily locate key points of information.34 See example 5.1

To help advocates seeking to design infographics, here are some SIMPLE RULES and EXAMPLES to follow:

1. **Ensure that your graphic does not lie.**
   The representation of numbers, as physically measured on the surface of the graphic itself, should be directly proportional to the numerical quantities represented. This is one of the most common and harmful misuses of Infographics. See example 5.2

   “Information, that is imperfectly acquired, is generally as imperfectly retained; and a man who has carefully investigated a printed table, finds, when done, that he has only a very faint and partial idea of what he has read; and that, like a figure imprinted on sand, is soon totally erased and defaced.”35

   —William Playfair
EXAMPLE 5.1

Although attractive and attention-grabbing, The Economist’s below Infographic becomes hard to read and understand because of the amount of information it attempts to relay.36

EXAMPLE 5.2

In the below graph, the New York Times posted an Infographic detailing the new fuel economy standards imposed by the U.S. Congress and the Department of Transportation. Beginning with 18 miles per gallon in 1978, the graphic shows the fuel economy standard increasing to 27.5 miles per gallon by 1985, an increase of 53 percent: \((27.5 - 18)/18 = 53\%\). The visual representation in the graph, however, tremendously exaggerates this increase. Instead of showing a 53% increase, the visual representation in the graph shows an increase of 783 percent: \((5.3 - 0.6)/0.6 = 783.33\%\). This sort of data manipulation is unacceptable and is to be avoided by all advocates.37

This line, representing 18 miles per gallon in 1978, is 0.6 inches long.

This line, representing 27.5 miles per gallon in 1985, is 5.3 inches long.
2. **Explain the data on the graphic.**
   Clear, detailed, and thorough labeling should be used to avoid confusion and ambiguity. Write out explanations of the data on the graphic itself. Labels are most effective when they are positioned next to the data being displayed in a chart. Labels placed adjacent to the trend lines or clustered bars are superior to labels placed in a disconnected legend box. See example 5.3

3. **Avoid overly fancy and distracting graphics.** Again, as stated above, do not try to overdo it with graphics. If the statistics are boring, then you’ve got the wrong numbers. The data must tell the story. The graphic simply compliments. See example 5.4

**ADDITIONAL RESOURCES**

Creating effective infographics typically requires graphic design and/or an artistic skillset that few people have. To assist the non-artist who desires to use such a tool, below are a few resources on the market that may be helpful (please note that the list is not intended to be comprehensive nor does it imply an endorsement in any way):

- Microsoft Excel
- Adobe Illustrator
- LibreOffice
- OpenOffice
- DeltaGraph
- Piktochart
- Jumsoft
- Infographics
- Easel.ly
- Infogr.am
- Visual.ly
- Tableau

**EXAMPLE 5.3**

Instead of placing important information in a legend, the designer of this infographic placed the labels directly next to the bars. The result is a clearly understood infographic. However, the designer failed to adhere to Rule #1: Ensure that your graphic does not lie. The data notes an increase of 454 percent. However, when using a ruler to measure for accuracy, the reader finds the percent change depicted in the image is 4,280\%

**EXAMPLE 5.4**

In an attempt to make its data exciting, The Economist created an infographic that is attractive but poorly organized. If looking for a particular country, the reader does not locate that key point of information as easily as she/he should.
In America’s representative democracy it is of vital importance to have well-informed policymakers. Policymakers gather information from many sources, including individuals and groups seeking policy change. These individuals and groups must themselves be well-informed about both the problem they seek to address and how the policymaking process works. They must be clear about the requirements and restrictions that regulate efforts to educate, advocate, and lobby. They must understand how to identify and reach key political players and the importance of staffers and constituents to the process.

They also must learn how to present their position in concise and relatable terms, using evidenced-based research. In addition, they must seek to show public support for their position by mobilizing and partnering with policymakers’ constituents. Advocates and decision makers alike agree with the efficacy of these actions. These are the measures that this resource guide advocates. These are the measures that have been shown to work.
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