national
co-ordinating centre
for public engagement

Policy makers

Guide to working with policy makers

A policy is ‘a plan, course of action, or set of regulations adopted by government, businesses, or other institutions designed to influence and determine decisions or procedures’ (UK Department for International Development, 2005). Engagement with policy is best considered before a project even begins, in the planning process, through discussions with stakeholders. However, even at the end of a project, you can still plan effective ways of bringing your message to people who can make a difference.

Before you engage with policy makers, you need to think about:

WHAT is your key message with relevance for policy? If you are in the planning stage of a project, you won’t know in advance what your findings will be, but you will likely have some idea where your work will lead.

WHY is this important for policy? You need to be able to sum this up in a few sentences - for yourself and others. Think through clearly and carefully why your message is important. Make sure you know what you want to achieve by engaging with policy makers - what exactly do you want them to do?

WHO has the power to make a difference? Identify key individuals and groups who make, implement or influence relevant policy - see below under Web Resources for useful links. They might be politicians, civil servants, professionals or business people. What about thinktanks, NGOs, charities, and international governance organisations?

WHEN to engage? The most effective stakeholder engagements are ‘upstream’, with dialogue throughout the project lifecycle beginning at the planning stage. But this isn’t always practical or appropriate - you may be in a position simply to present findings once a project is complete.

WHERE to engage? Politicians, civil servants and lobbyists are busy people and there will be others competing for their ear. Not all have the flexibility or budget to travel to events away from their place of work, even if they have the time and inclination. You may well need to go to your policy audience (for example, in London or Brussels), and build funding for this into your project budget.

HOW to engage? If your project is significant, it may warrant a full-scale meeting of policy makers and professionals. A workshop format is particularly suitable for engaging stakeholders during the lifecycle of a project. At the end of a project, a press release, policy brief or report may be appropriate. Online media (e.g., Twitter) can be a powerful way to reach certain policy communities.

Two of the most common ways of engaging with policymakers are via meetings (large or small) and written policy briefs. Here are some practical tips for these two methods:

Meetings and workshops

If you want to have a successful meeting with policy makers and other stakeholders, you need to get a sense of the kind of event most appropriate both to your work and your target audience. To present findings, a short briefing or lunchtime seminar may be best. To explore questions in more depth, consider a slightly longer workshop. Here are some specific tips:

- **Find out the 'downtimes' for your target audiences.** For instance, Friday morning can be a good time for Whitehall, Wednesday night for Scottish Parliament, and before elections for civil servants.
- **Short meetings are best** - half-day or less. Longer meetings may be possible but need to be worked out ahead of time. If having policy makers or professionals is key to your meeting, find out their schedules before you fix the date, time and length of the meeting. If you hold a day-long meeting, policy makers may only be able to attend for part of the day.
- **Focus on your audience's needs.** State the audience benefit for the event in your promotional materials and introductory welcome on the day. Why is this meeting, and your work, important for them? Focus on your key message and whatever background information your audience needs.
- **A meeting should be a dialogue.** Give stakeholders the chance to react, raise their concerns and provide their perspectives. A workshop format (rather than presentations) provides time for more interaction, although a briefing format may be suitable for shorter, smaller meetings (e.g., lunchtime seminars).
- **Take appropriate printed materials.** For a one-on-one meeting, business cards and policy briefs are ideal, as are other short communications materials. If you bring a report or journal article, include a one-page summary on top.
- Your institution or unit may be able to **provide support** for policy-oriented meetings, or you might consider setting up an event in an **existing series**, such as the ESRC Public Policy Seminar Series.

Policy briefings

There are a number of different terms for a policy brief, including briefing paper or report, briefing note, research briefing, etc. The terminology can be confusing, but the advice here relates to a short (2-4 A4 sides) document that summarises a project or key research findings and their policy implications.

There are a number of conventions but no hard-and-fast rules for how to write a policy brief. Different organisations and different people have their own styles. If you are new to this form of communication, look at previous examples from your own institution or others, readily available online.

- Your institution may have templates for policy briefings which you should use - contact the communications and marketing team if you're unsure.
- Allow time for graphic design and printing if you require materials for a particular event. Professional printing is advisable if you have the budget, as your brief will be taken more seriously.
- Aim for about 1500 words for a 2-side brief and 2500 for 4 sides.
- In general, include the following sections in order: Key points, Introduction, Findings and Policy Recommendations. Avoid having a separate Methods section – these can be described briefly in the Introduction or elsewhere.
- State clearly at the outset what the brief aims to do (e.g., summarise existing research, report project findings, present your organisation's position). Explain the context both practically and conceptually. Spell out clearly and carefully why what you have found is important (in its own right and for policy/practice), and different from what was known previously.
- Focus on your (policy-relevant) findings and recommendations! These should be highlighted, and take up most space. Keep it simple - a short brief is not the place for nuance.
- Use numbers, tables, charts and graphs where possible - all these break up the text and draw the eye to key findings. If appropriate, statistics provide evidence and make your message concrete.
- For qualitative projects, include quotations from interviews or participant feedback to break up the text and engage the reader. Names/pseudonyms and other details about individual participants will also catch the reader's eye.
- Policy recommendations should be clear, specific and realistic - but don't be over-cautious or sit on the fence; embrace your findings and recommendations!

- Include references. Author-date, numbered or endnote references are all fine, but avoid footnotes scattered on different pages of the brief. Refer the reader to your own longer reports and other publications. In a 4-page brief about 5-10 references will provide evidence without overwhelming or distracting, or turning the brief into an academic paper.
- Attribute authorship and editorial contributions. You may want to include a recommended citation.
- Plain English is key. Avoid jargon - spell out acronyms and explain technical terms in the text the first time they are used. But stay relatively formal - avoid contractions (isn't, doesn't, etc).
- Keep the title clear and simple, stating exactly what your brief is about.
- Include a 'Key Points' box at the beginning of your brief. If the reader only has time to glance at this, s/he should still have a sense of your message.
- Break up the text and highlight key points. Keep paragraphs short (3-4 sentences each), and use sub-headings (up to 5-10 per page). Try dot points/numbered points; bold, italics or underlining of key terms, findings or conclusions; text boxes; etc. The format and design elements should all work to engage the reader and communicate your message as clearly as possible.
- Use images to communicate what your brief is about. Avoid leaving large areas of blank space at the end of your brief. Choose the appropriate number of pages for your content and format your text and graphics to fill (or nearly fill) them.
- Have you acknowledged your partners and funding sources? Include all appropriate logos, and follow the branding rules of any partner organisations or external funders.
- Proofread carefully!
- Test the print quality of your brief on a regular black and white office printer - especially for charts and other graphics. Even if you are doing a colour print-run, others may photocopy the brief or print it out from a pdf.
- Identify the audience and distribution plan for your brief in advance. There is no point creating a brief for it to collect dust on your office shelf until it goes out of date! Email distribution is quick and cheap, but emails can easily be deleted or ignored. A hard-copy mail-out to key individuals is worthwhile. Be sure to take copies to distribute at appropriate events.
- Post your brief on your organisation's website and other policy sites. Policy Library reaches an audience of hundreds of thousands, including policy makers and politicians.

The most obvious policy audiences are politicians and civil servants, but other individuals and organisations (global, regional, national and local) influence policy in different ways. These include international governance and advisory bodies, thinktanks, NGOs, business and industry, professionals, trade unions, religious institutions, and community and lobby groups.