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Measuring and Understanding Education **Advocacy**

Grover J. (Russ) Whitehurst, The Brookings Institution
David Stuit, Claire Graves, and Lauren Shaw, Basis Policy Research
March 2015

Executive Summary

The traditional delivery system for public K-12 education in the U.S. is being disrupted by forces from without (e.g., forms of competition, including charter schools) and from within (e.g., new regulatory requirements, including meaningful teacher evaluation and the Common Core). As in any sizable sector of the economy, challenges to the status quo in education are often met by organized advocacy efforts. Because education in this country is by-and-large a public enterprise, champions of change and defenders of the status quo must turn to elected and appointed officials to advocate for their desired outcome.

Do such advocacy efforts succeed in influencing the public policy that governs education?

This report sheds light on that question by examining the influence and approach of advocacy organizations in three states that recently enacted or considered school reform legislation: Louisiana, Tennessee, and North Carolina. It builds upon research we conducted for a previous report which focused exclusively on Louisiana.

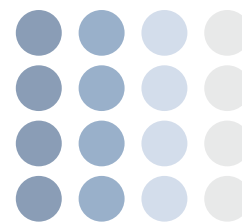
In Louisiana, we examined the activity of advocacy groups leading up to the 2012 passage of the state's omnibus school choice legislation, House Bill 976. In North Carolina, we studied the activity of advocacy groups with respect to Senate Bill 337, a piece of charter school legislation that ultimately passed the legislature in 2013 after undergoing a variety of modifications. In Tennessee, we explored advocates' involvement in a voucher bill known as the Tennessee Choice and Opportunity Scholarship Act (Senate Bill 196 / House Bill 190), which was debated by the state's 108th General Assembly but was ultimately

removed from consideration. Thus, these case studies span the range of legislative outcomes, from a strong legislative victory for proponents of change (Louisiana), to a compromise victory for those proponents (North Carolina), to a loss (Tennessee).

In our prior report, we introduced a new method to study influence: the Survey with Placebo (SwP), which asks respondents to rate the influence of a non-existent advocacy group (the placebo), along with actual entities engaged in advocacy. By comparing the scores of real organizations with those of the placebo group, a scale of influence with a known zero point is generated. This allows us to quantify the amount of influence any organization exercises and to test for the statistical significance of differences between influence scores.

In this study, we again employ the SwP technique, amended slightly based on lessons learned from its first use. Because the examined advocacy groups represent a diverse range of missions, utilize a variety of advocacy tactics, and focus efforts on different stages of the policymaking process, we also employ a Critical Path Analysis (CPA) to differentiate advocacy organizations in terms of the paths through which they exercise influence. The CPA allows us to identify the particular goals and tactics of each organization in order to evaluate the degree to which that particular organization was able to implement its strategy successfully.

Applying these two methods to the case studies in Louisiana, North Carolina, and Tennessee provided several compelling findings with respect to the influence process and success of advocacy efforts, and also with regards to the future use of such measures in evaluating advocacy.



Grover J. (Russ) Whitehurst is the Herman and George R. Brown Chair in Education Studies and a senior fellow in Governance Studies at the Brookings Institution.

David Stuit is a founding partner of Basis Policy Research.

Claire Graves is a research associate at Basis Policy Research.

Lauren Shaw is a research associate at Basis Policy Research.

Key Findings with respect to the influence process:

- The advocacy organizations we studied are a clearly recognized influence within each of the respective states. They have an impact on the introduction of policy into the legislative arena, the content of legislation, and the votes of members of the legislature.
- Perceived influence closely tracks outcomes. When the policy of interest is not passed into law, opponents are credited with substantially greater influence than in sites where the policy is successful.
- The effort to influence political outcomes, just like politics itself, is local. For example, approaches appropriate to a state in which the governor is the dominant political force with respect to the legislation of interest, as was the case in Louisiana, will be different than in a state in which the legislature is more powerful, as was the case in North Carolina.
- Advocacy organizations that are nominally in the same camp in terms of being supporters or opponents of a piece of legislation frequently have different objectives when it comes to the content of the bill. Contradictory messaging, or publicly visible discord, among advocacy organizations that appear to be part of the same pro-legislation team provide openings that opponents exploit in their own advocacy efforts.
- Coordination among advocacy organizations that have related policy goals strengthens total impact. In Louisiana, for example, one of the advocacy groups focused on obtaining coordination and cooperation among all groups supporting

the legislation. This allowed each group in the coalition to focus on what it could do best and provided opportunities for working through any conflicts in policy goals among the advocacy organizations out of the public eye.

Key Findings with respect to methods and measures:

- The Survey with Placebo (SwP) can detect meaningful differences in the perceived influence of advocacy groups and between the actual influence groups vs. the placebo organization.
- Respondents to the SwP typically separate their own positions as supporters or opponents of the legislation from their ratings of influence. Overall, organizations on the winning side of a legislative battle are perceived by respondents to be more effective than those on the losing side.
- Critical Path Analysis (CPA) with advocacy group leaders and with those playing critical roles in the political process surrounding the issue of interest reveals significant information that cannot be gathered through the SwP. For example, one learns how a particular advocacy organization goes about generating grassroots support and focusing it at times and places that have political leverage. The expense and labor required to conduct the CPA makes it impractical to pursue on a regular basis, but interested parties may consider leveraging this method in sites where they are particularly interested in developing a better understanding of the advocacy environment and the specific strategies that advocates deploy.

Introduction

Education policy in the U.S. is in a period of intense political focus. The traditional delivery system for public K-12 education is being disrupted from without by forms of competition, including charter schools, and from within by new regulatory requirements, including meaningful teacher evaluation and the Common Core.

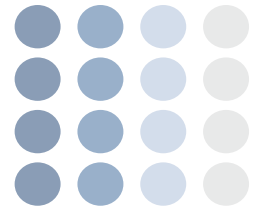
Challenges to the status quo within any sizable sector of the economy are often accompanied by organized advocacy. This is true in K-12 education as well, but education is a special case in that it is by-and-large a public enterprise in which all decisions involving management and resources are grounded in the politics of local school boards, mayoral administrations, and state and federal government. Those whose interests are served by the traditional system of delivery as well as those who want substantial change must turn to elected and appointed officials and those who influence them to make their case.

In this context, a new generation of education advocacy groups has emerged, seeking to exercise influence and benefitting from the financial support of philanthropies. They often are pitted against organizations that oppose disruptive change, such as teacher unions and associations representing school boards and school district administrators, and that have historically advocated for their policy preferences with little in the way of an organized counterweight from those with different policy preferences.

This report sheds light on this new world of organized education reform advocacy by examining the influence and approach of advocacy organizations in Louisiana, Tennessee, and North Carolina that were active in the politics of recent school reform legislation unique to each state. In Louisiana, a state on which we focused in a previous [report](#), we

examined the activity of advocacy groups leading up to the passage in 2012 of the state's omnibus school choice legislation, House Bill 976, which led to the statewide expansion of the New Orleans voucher program as well as other aspects of educational choice. In North Carolina, we studied the activity of advocacy groups with respect to Senate Bill 337, a piece of charter school legislation that ultimately passed the legislature in 2013 after undergoing a variety of modifications that weakened its original intent to provide more autonomy to the charter school sector. In Tennessee, we explored advocates' involvement surrounding a voucher bill known as the Tennessee Choice and Opportunity Scholarship Act (Senate Bill 196 / House Bill 190), which was debated in the 2013 and 2014 sessions of the state's 108th General Assembly but was ultimately removed from consideration. The advocacy groups involved in each of these states represent a range of the types of organization involved in education advocacy across the nation; and our case studies span the range of legislative outcomes from a strong legislative victory for proponents of change (Louisiana), to a compromise victory for those proponents (North Carolina), to a loss (Tennessee).

Our efforts to understand education advocacy required us to create new measurement tools and methodological approaches to address two longstanding challenges in the study of social influence. The first is that typical survey methods that ask respondents to rate or rank-order various entities in terms of influence produce only ordinal or interval data. Thus, one can learn that organization Alpha is ranked first in terms of influence whereas organization Beta is ranked second, or that Alpha received a mean score on a scale of influence of 6.5 whereas Beta received a mean of 6.0. But one cannot determine what the numbers and rankings mean in absolute terms. Is it that Alpha and Beta differed somewhat in their influence but neither had much impact, or is it that they differed somewhat and both had substantial impact? There is no way to tell with the results of a traditional survey of perceived influence.



This report sheds light on this new world of organized education reform advocacy by examining the influence and approach of advocacy organizations in Louisiana, Tennessee, and North Carolina.

To address the challenge of providing an anchor to the numbers produced by a reputational survey, we introduced in our previous report—and refine in the present report—a survey method that allows for measurement of influence on a ratio scale, i.e., a scale in which there is a non-arbitrary zero point. Our method, called the Survey with Placebo (SwP), requires respondents to rate the influence of a fictional advocacy group (the placebo) along with actual entities engaged in advocacy. By comparing the scores of real organizations with those of the placebo group we generate a scale of influence with a known zero point (the score given to the placebo organization). This allows us to quantify the amount of influence any organization exercises and to test for the statistical significance of differences between influence scores.

The second challenge is to capture information that differentiates advocacy organizations in terms of the paths through which they exercise influence. Imagine two advocacy organizations that operate in very different realms—one engages in personal lobbying of legislators whereas the other deploys social media to impact public opinion. To be sure, it would be valuable to be able to evaluate the perceived influence of the two organizations on the same scale, as we do with the SwP. But it is also important to understand the particular goals and tactics of each organization in order to evaluate the degree to which that particular organization was able to successfully implement its action plan. Our methodological approach to differentiating the tactics and goals of advocacy organizations is called Critical Path Analysis (CPA): High-level officials in each advocacy organization participate in structured interviews in which they are asked to define their influence efforts in terms of the channels they use and the actions they deploy at different stages of the advocacy process. These revealed plans are then subjected to validation by structured interviews with knowledgeable respondents outside the organization who are in a position to have observed whether the activities described by the official of the advocacy organization were actually observed in practice.

Background on Legislation

Louisiana School Choice Legislation

Louisiana's 2012 House Bill 976, which became Act 2 upon being signed into law in April of that year, creates or alters four different programs and processes. Most notably, it expands eligibility for Louisiana's existing voucher program, Student Scholarships for Educational Excellence (SSEE), from only students in New Orleans to all students statewide in families with a total income not exceeding 250 percent of the federal poverty guidelines and who are entering kindergarten, were enrolled in a Louisiana public school with an accountability grade of C, D, or F, or received a scholarship the previous school year. Students are eligible to transfer to participating private schools or to public schools with an A or B grade. This is sometimes referred to as the "voucher portion" of the bill, and was considered the heart of the legislation.

The law also makes a number of changes to charter school statutes. It requires the state Board of Elementary and Secondary Education (BESE) to approve a common charter application, recruit chartering groups, and create a process for authorizing multiple charter schools. BESE is also given the ability to approve charter proposals if a local school board fails to comply with the charter application requirements. Related to authorizers, HB 976 requires BESE to establish procedures for certifying local charter authorizers, including nonprofit organizations and universities, for the purpose of accepting, evaluating, and approving applications for charter schools from chartering groups.

In addition, the legislation permits parents of students attending a public school with a letter grade

of D or F for three consecutive years to petition BESE to transfer the school to the Recovery School District, a state-run district tasked with turning around chronically low-performing schools. Finally, the bill requires BESE to create a process through which virtual course providers, postsecondary institutions, or corporations can be authorized to provide courses to Louisiana students.

The bill passed with a comfortable margin in both houses, gaining 58 percent of the vote in the House and 62 percent in the Senate. The bill garnered bi-partisan support in Louisiana's Republican-dominated legislature, with 29 percent of House Democrats and 47 percent of Senate Democrats voting in favor of the bill.

North Carolina Charter School Legislation

As originally introduced, Senate Bill 337 proposed a variety of changes to laws governing charter schools in North Carolina. The centerpiece of the legislation was the proposed creation of the North Carolina Public Charter Schools Board, which would operate independently of the State Board of Education and take on responsibility for authorizing and overseeing charter schools. Among many other provisions, the bill was also intended to eliminate requirements for charter school teacher licensure, require charter school boards to adopt a policy regarding whether they would conduct criminal background checks, and require the transfer of local school district funds to charters within thirty days. Over the course of the legislative process, the bill underwent numerous substantive changes. These included the establishment of a charter school advisory board rather than an independent board, the reduction of the percentage of teachers in a charter school required to hold licenses rather than the elimination of all licensure requirements, and a mandate for charter schools to adopt criminal background check policies that mirror those in their local district. The final version of the bill was signed into law in July 2013.

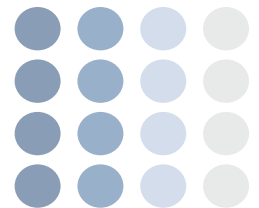
The bill passed with 82 percent of voting Senators and 80 percent of voting Representatives supporting

the legislation. Both chambers are marked by Republican control, and no Republican lawmaker voted against the bill in either chamber. Democrats were almost equally as likely to support as to oppose the bill in the House (46 percent of Democrats voted yes while 54 percent voted no), but voted more consistently against the bill in the Senate (31 percent voted in support and 69 percent in opposition). While the final vote count represents the ultimate success of policy passage, the major efforts of the advocacy groups of interest in our study were directed toward the content of the policy under study—not its ultimate passage.

Tennessee School Voucher Legislation

The Tennessee Choice and Opportunity Scholarship Act (Senate Bill 196 / House Bill 190) was introduced in 2013 on behalf of Governor Bill Haslam at the beginning of Tennessee's two year legislative cycle. As originally filed, the legislation would have allowed a limited number of low-income students in the state's bottom five percent of schools to receive vouchers that could be used to attend private schools. The program would have been initially capped at 5,000 vouchers, increasing to 20,000 over time.

During the 2013 session, Governor Haslam resisted efforts to amend the program to expand eligibility to more students, ultimately withdrawing his legislation rather than allowing it to be altered. Movement on the pair of bills resumed in 2014, and they were each amended in committee to broaden the pool of eligible students, though the two chambers' amendments differed in their approach. Senate Bill 196 passed the Senate with a wide margin (21 to 10). However, indicating that the bill lacked enough support among committee members, the House sponsor withdrew the legislation from the lower chamber's finance committee, killing the bill for the session.



By comparing the scores of real organizations with those of the placebo group we generate a scale of influence with a known zero point (the score given to the placebo organization).

Methods

This section describes in greater detail the two methods used to measure the influence of advocacy groups on policy outcomes in our research sites, highlighting how the methods were refined in year two based on findings from year one.

Study with Placebo

The first method, the SwP, is a variant of the “attributed influence” surveys used by political scientists to study influence of interest groups.¹ In each research site, we distributed a survey to all state legislators along with a group of political insiders who were expected to have first-hand knowledge of the factors that influenced the legislation under study. The inclusion of a placebo organization known to have had zero influence distinguishes this method from the typical attributed influence survey.

Advocacy groups included on the SwP

Each research site survey included five to six real advocacy groups involved with the policy issue under study and a placebo group known to have had no involvement in the influence process in that state.² The mix of real advocacy groups listed on the survey included those working in support of the legislation and those that opposed the legislation. We used the same placebo name across sites: Road to Educational Achievement (REACH).³ Table 1 displays information about the advocacy groups included in the survey across the three states under study.

Administration of the SwP

Long and short form versions of the survey were used in two of the three research sites, though the long form was always our preferred data collection instrument. The long form of the survey was administered at the beginning of the survey window to all respondents in both hard copy and electronic formats.

In the first year of our work, the long form was designed to take approximately 20 minutes to complete. It asked respondents to rank the level of influence of each advocacy organization’s use of six different tactics.

Several changes were made to the long form in year two. The modified long form included five survey questions and was designed to take five minutes to complete. The first question asked respondents to assess their knowledge regarding the influence of advocacy groups on the policy issue under study and assign themselves a rating ranging from “Very Knowledgeable” to “Not at all Knowledgeable.” On the next three questions, which were the core of the tool, respondents were asked to rate the amount of influence that each advocacy organization had on: the content of the legislation; increasing support for the legislation; and increasing opposition to the legislation. Ratings were based on a 7-point scale, ranging from 1 (No Influence) to 7 (Major Influence). A culminating question asked respondents to rate the amount of influence that five key political actors had on the policy of interest using the same 7-point scale. These political actors included advocacy groups, civic leaders, constituents (general public), the governor’s office, and the state board of education. A copy of the version of the long form used in Tennessee is reproduced in Appendix A.

Table 1. Number of advocacy groups included on the SwP

	Louisiana	Tennessee	North Carolina
Proponents	4	4	3
Opponents	2	2	2
Placebo	1	1	1
Total # Groups	7	7	6

In Louisiana, the survey was sent to 194 individuals with first-hand knowledge of how the policy outcome came to be. The target sample consisted of 142 legislators and 52 political insiders. In both Tennessee and North Carolina, the number of political insiders targeted was increased, resulting in a larger overall survey sample. A total of 250 individuals received the survey in Tennessee, including 119 legislators and 131 political insiders.

The target sample was similar in North Carolina, consisting of 263 individuals, including 163 state legislators and 100 political insiders. Table 2 compares the survey sample in the three research sites.

The survey results were used to calculate a measure of attributed influence for each advocacy group in the survey on each of the three central questions included on the long form: amount of influence on legislative content; increasing legislative support; and increasing legislative opposition. We focus on comparisons between the actual advocacy groups and the placebo group, REACH, which was included in all versions of the survey distributed. These ratings capture how strongly the respondents endorsed the influence of the advocacy group over that of the placebo. Comparing the influence rating of each advocacy group to the inactive placebo group allows us to evaluate whether the influence attributed to each advocacy group is statistically significant.

Critical Path Analysis

The interview analysis complements the SwP by looking inside the black box of advocacy group activity. This method involves gathering qualitative data to verify the relationship between an advocacy tactic and a specific policy outcome.⁴ While the modified version of the SwP is designed to measure the amount of influence that advocacy groups have, the critical path analysis is designed to capture the ways in which advocacy groups exert that influence.

In year one of the study, each of the critical paths we identified connected an advocacy tactic to the final passage of a piece of school voucher legislation, an outcome that took place during the decision making stage of the policy process. However, in year two of our study, we expanded the focus of our critical path work to consider outcomes from other stages of the policy process, including agenda setting and policy formulation (Anderson, 1975; Sabatier, 1991; Jann and Wegrich, 2007).⁵ Across our research sites, advocacy groups often pointed to their role in promoting the policy issue under study on the legislative agenda (agenda setting) or shaping the policy content (policy formulation) as important elements of their work. Therefore, by broadening our focus to include stages earlier in the policymaking

Table 2. SwP survey sample in each research site

	Louisiana	Tennessee	North Carolina
Legislators	142	119	163
Political Insiders	52	131	100
Total Sample	194	250	263

process, we were able to capture more of the tactics that advocates themselves believed to be significant contributions to the overall policy effort.

This expanded approach also aligned more closely with the revisions made to the survey tool in year two. In relation to the policy formulation phase, respondents were asked to indicate how much influence each of the included advocacy groups had on the content of the legislation under consideration. Two of the other items ask respondents to identify the amount of influence that organizations had on increasing support for the legislation and increasing opposition to the legislation—questions intended to reveal information about the decision making stage.

As a first step in the critical path analysis, we conducted interviews with the advocacy groups of interest in each of our research sites. The interviews focused on identifying the various tactics used by the organizations, and for each major tactic described, the sequence of events (“intermediate outcomes”) that link the tactic to a final outcome in one or more of the policymaking stages we explored. In Tennessee, we conducted interviews with advocacy group leaders while the policy of interest was under consideration in the legislature and then followed up with a second interview following the withdrawal of the legislation. This allowed us first to capture desired outcomes from specific tactics that advocates had implemented or were planning to implement, and then to collect additional information once the policy outcome was known. In both Louisiana and North Carolina, advocacy organization interviews were conducted approximately one year following the passage of the policy of interest.

After documenting all of the tactics used by each advocacy group, the research team selected a small number of tactics that highlighted the unique roles and major strategies adopted by each advocacy group to explore through the critical path analysis. A critical path was diagramed for each tactic to summarize the advocacy group's conjecture on how the tactic was connected to a specific outcome in the agenda setting, policy formulation, or decision making stage. Each path diagram begins with an advocacy tactic and ends with a stage-related outcome. For example, the introduction of legislation related to the issue of interest is a potential outcome of the agenda setting stage, while an amendment shaping the policy content in a direction favored by the advocacy group is a potential outcome of the policy formulation stage.

If the path involves a personal or informational channel of influence, the tactic is linked directly to a policymaker outcome, as they were the immediate audience of the tactic. If the channel of influence is indirect, the path is mediated by the response of the third party that was the immediate audience of the tactic. For example, the influence of a grassroots

campaign on policymakers' support for a policy will depend—at least in part—on the response of members of the public exposed to the grassroots campaign. In situations where the final policy outcome sought was not achieved, the outcome is shaded and we represent the path linking the previous intermediate outcome to the final policy outcome as broken.

Initial sketches of the diagrams were sent to the advocacy groups in order to confirm that they accurately reflected their hypotheses on the chain of events linking the tactic to the policy outcome. The research team proceeded to gather evidence to verify the chains of events shown in each diagram, beginning with the implementation of the tactic and working forward in the path toward the relevant policy outcome. Evidence was gathered from official state records, media reports, and interviews with legislators and political insiders. We sought both evidence that particular tactics and intermediate outcomes occurred, as well as evidence that particular steps in the path influenced subsequent steps. After completing the collection of evidence, the findings were summarized in narrative form.

Advocacy Groups

Louisiana

In Louisiana, we examined the influence of six advocacy groups active on House Bill 976 during its consideration in 2012, four of which supported the legislation, and two of which opposed the legislation. The groups and their missions are described in Table 3.

Table 3. Louisiana Advocacy Organizations

Organization Name	Mission	Supports Legislation
Black Alliance for Educational Options	"The mission of the Black Alliance for Educational Options is to increase access to high quality education options for Black children by actively supporting transformational education reform initiatives and parental choice policies that empower low-income and working-class Black families." ⁶	Yes
Louisiana Association of Business and Industry	"The mission of the Louisiana Association of Business and Industry (LABI) is to foster a climate for economic growth by championing the principles of the free enterprise system and representing the general interests of the business community through active involvement in the political, legislative, judicial and regulatory processes." ⁷	Yes
Louisiana Association of Public Charter Schools	"The mission of the Louisiana Association of Public Charter Schools is to support, promote, and advocate for the Louisiana charter school movement, increasing student access to high quality public schools statewide." ⁸	Yes
Louisiana Federation for Children	"The Louisiana Federation for Children is a project of the American Federation for Children and the Alliance for School Choice, dedicated to promoting educational choice by protecting, growing and expanding scholarship programs for low and middle-income children." ⁹	Yes
Louisiana Federation of Teachers	"The American Federation of Teachers [of which the Louisiana Federation of Teachers is the statewide affiliate] is a union of professionals that champions fairness; democracy; economic opportunity; and high-quality public education, healthcare and public services for our students, their families and our communities. We are committed to advancing these principles through community engagement, organizing, collective bargaining and political activism, and especially through the work our members do." ¹⁰	No
Louisiana School Boards Association	"The mission of the Louisiana School Boards Association is to provide leadership, services, and support for its members so that they become more effective as policy makers in meeting the educational needs of all students." ¹¹	No

North Carolina

In North Carolina, we examined the influence of five advocacy groups active on Senate Bill 337 during the 2013 session of the North Carolina General Assembly. Because of the multi-faceted nature of the legislation, some organizations supported particular elements of the original bill while opposing others. This makes it difficult to identify some organizations as pure “supporters” vs. “opponents.” Therefore, we identify groups as those working in support of charter schools and those which generally work in opposition to charter school expansion and deregulation. Three of the groups included in the survey are considered pro-charter groups, and two are groups that voice opposition. The groups and their missions are described in Table 4.

Table 4. North Carolina Advocacy Organizations

Organization Name	Mission	Supports Legislation
North Carolina Alliance for Public Charter Schools	“Our mission is to advance quality educational opportunities for all North Carolina children by supporting and expanding effective public charter schools.” ¹²	Yes
North Carolina Association of Educators	“To be the voice of educators in North Carolina that unites, organizes and empowers members to be advocates for education professionals, public education and children.” ¹³	No
North Carolina Justice Center	“As a leading progressive research and advocacy organization, our mission is to eliminate poverty in North Carolina by ensuring that every household in the state has access to the resources, services and fair treatment it needs to achieve economic security.” ¹⁴	No
North Carolina Public Charter Schools Association	“The mission of the [NC Public Charter Schools] Association is to grow and sustain high quality public charter schools that nourish North Carolina’s children and enrich their families.” ¹⁵	Yes
Parents for Educational Freedom in North Carolina	“Our mission is to inform parents of the benefits of expanded educational options and empower them to exercise freedom in meeting their children’s needs, regardless of race, national origin, income or religion.”	Yes

Tennessee

In Tennessee, we examined the influence of six advocacy groups surrounding Senate Bill 196 / House Bill 190, four of which supported the legislation, and two of which opposed the legislation. The groups and their missions are described in Table 5.

Table 5. Tennessee Advocacy Organizations

Organization Name	Mission	Supports Legislation
Beacon Center of Tennessee	"The Beacon Center of Tennessee empowers Tennesseans to reclaim control of their lives, so that they can freely pursue their version of the American Dream. The Center is a nonprofit, nonpartisan, and independent organization dedicated to providing concerned citizens and public leaders with expert empirical research and timely free market solutions to public policy issues in Tennessee." ¹⁷	Yes
School Choice Now	Note: School Choice Now is a grassroots campaign that represents a partnership between the Beacon Center and the Tennessee Federation for Children, two other organizations included on the SwP. These organizations branded their grassroots activities using the "School Choice Now" name. Thus, School Choice Now does not have a distinct organizational mission.	Yes
StudentsFirst	"StudentsFirst is a nonprofit organization fighting for one purpose: to make sure every student in America has access to great schools and great teachers. We are driven by the belief that every child—regardless of background—can succeed if put in the right school environment. And every day we work to build an education system that makes this possible." ¹⁸	Yes
Tennessee Education Association	"The mission of the Tennessee Education Association is to protect and advocate for our students, our profession, and our members to create great public schools that prepare everyone for success in a global society." ¹⁹	No
Tennessee Federation for Children	"The Tennessee Federation for Children's mission is to support equal opportunity in education." ²⁰	Yes
Tennessee School Boards Association	"The mission of the Tennessee School Boards Association is to assist school boards in effectively governing school districts." ²¹	No

Survey with Placebo Findings

As shown in Table 6, response rates across all three research sites were similar, with the exception of a higher response rate among political insiders in Louisiana. Overall response rates ranged from 37 percent in Louisiana to 30 percent in North Carolina. The highest legislative response rate was 23 percent in North Carolina and the lowest legislative response rate was 17 percent in Tennessee.

Below, we present survey findings from the three years of our study to answer four key questions regarding the SwP's utility and feasibility. These four questions and their motivation are laid out in Table 7.

Table 6. Survey response rates across research sites

Respondent Group	Sampling Frame	Total Respondents	Response Rate
Louisiana			
Legislators	142	29	20%
Political Insiders	52	43	83%
Overall	194	72	37%
Tennessee			
Legislators	119	20	17%
Political Insiders	131	57	44%
Overall	250	77	31%
North Carolina			
Legislators	163	38	23%
Political Insiders	100	40	40%
Overall	263	78	30%

Table 7. Key questions regarding the SwP's utility and feasibility

Key Question	Motivation
1. Do actual advocacy groups receive influence ratings that differ from those assigned to the placebo?	Essential to determining if the SwP tool has utility for quantifying influence.
2. Do influence ratings differ by respondent's position on the policy issue?	Identifies whether respondents on different sides of a policy issue assign different ratings to the advocacy groups to shed light on whether self-selection in regards to who chooses to respond to the survey may bias the survey results.
3. Do influence ratings differ by respondent type?	Provides insights regarding whether responses from political insiders can generate information that is similar to that generated from legislator responses.
4. Are advocacy groups attributed different levels of influence across stages of the policymaking process?	Indicates whether the SwP is able to distinguish "when" influence occurred.

Do actual advocacy groups receive influence ratings that differ from those assigned to the placebo?

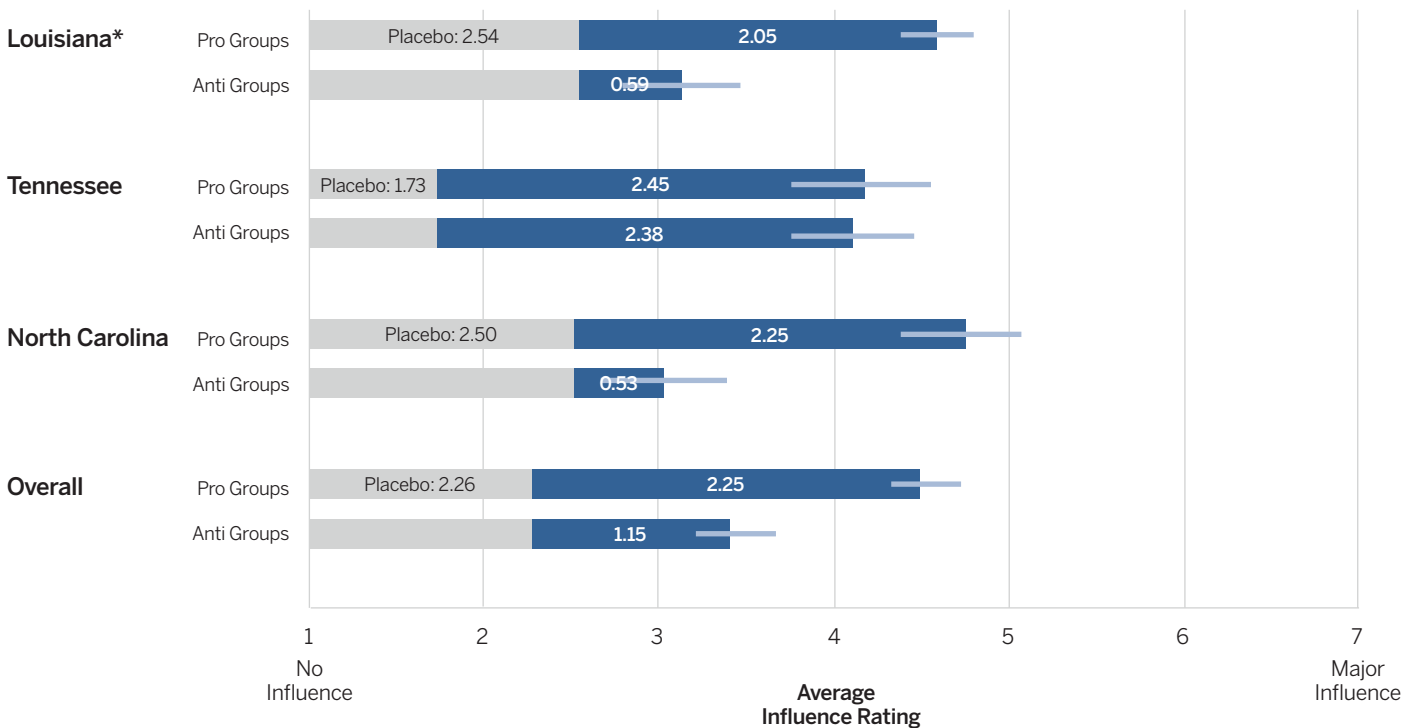
This question is essential to determining if the SwP tool has utility for quantifying influence. We would expect that a group known to have had no involvement in the policy issue under consideration would receive the lowest score among the listed advocacy groups.

To answer this question, we compared the mean overall influence rating assigned to pro school choice advocacy groups and anti school choice advocacy groups across the three states included in our study to the rating assigned to the placebo across those three states. For organizations examined in Louisiana, their overall influence rating is simply their score on

the single item included on the year one survey. In year two sites, we averaged pro school choice groups' ratings on the content and support questions to determine their overall influence rating and combined anti school choice groups' ratings on the content and opposition questions to establish their overall influence rating. The placebo's overall rating in year two sites represents its average rating across the content, support, and opposition questions.

We find that there are statistically significant differences between the placebo group rating and the ratings of pro school choice advocacy groups or anti school choice advocacy groups (Figure 1). In Louisiana and North Carolina, states where the school choice policy of interest was successfully passed, pro school choice advocacy groups were

Figure 1. Legislator and political insider advocacy group influence ratings



Note: Figure 1 shows the mean influence ratings for each advocacy group. Thin light blue bars show the 95% confidence interval around each mean. The gray bars indicate the placebo mean rating. The data labels on the blue bar indicate the difference between the placebo and the organization mean ratings, representing the groups' influence score. Means presented are means used in paired t-tests, thus observations without ratings for all groups, including the placebo, are excluded. (Louisiana, n=61; Tennessee, n= 59; North Carolina, n=61; Overall, n=181). *In Louisiana, the survey scale was "Least influential" (1) to "Most Influential" (7).

Source: Survey results. Authors' calculations.

rated significantly higher than anti school choice groups, while in Tennessee, where the school choice policy of interest was not successfully passed, differences in ratings of pro school choice and anti school choice groups were not statistically significant. We would expect that “winners” would be more influential than “losers” in any particular state. In fact, when considering only influence in the decision making stage (influence on increasing support or increasing opposition), anti school choice groups in Tennessee receive higher influence ratings than pro school choice groups in the state

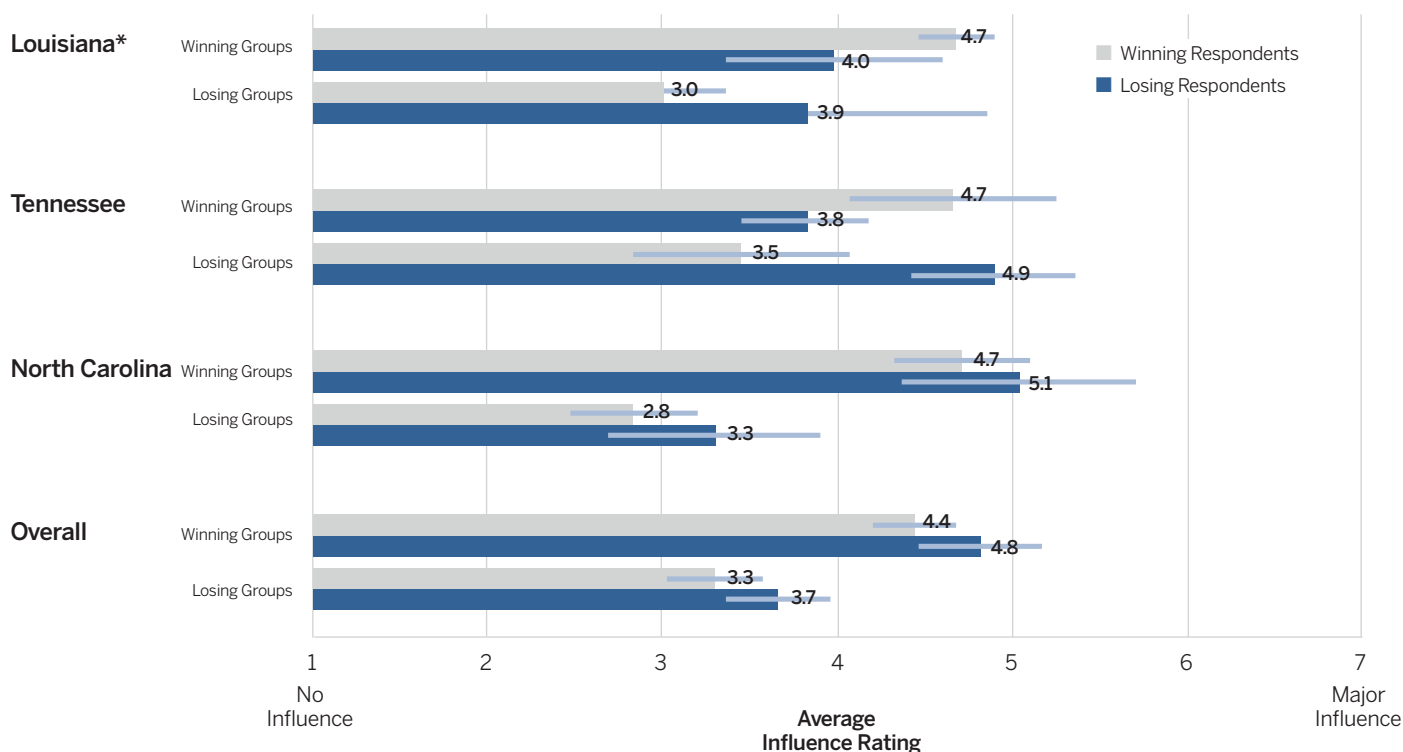
Across research sites, respondents were consistently able to accurately identify the placebo organization as the least influential group included on the survey.²² This finding gives us confidence in the SwP’s ability

to establish a valid measure of advocacy group influence across diverse settings with varying policy outcomes. Even in the states where the school choice policy of interest was successfully passed and the anti school choice advocacy groups showed significantly lower influence than the pro school choice groups, the tool was able to produce statistically significant differences between the placebo and the anti school choice groups.

Do influence ratings differ by respondent’s position on the policy issue?

Identifying whether respondents on different sides of a policy issue assign different ratings to the advocacy groups sheds light on whether self-selection in regards to who chooses to respond to the survey

Figure 2. Influence ratings by respondent and advocacy group position on policy outcome



Note: Figure 2 shows average means for all winning advocacy groups and losing advocacy groups according to respondent position as a supporter of the winning or of the losing policy position. Thin light blue bars show 95% confidence intervals around each mean. Across the research sites, 9 Louisiana respondents, 4 Tennessee respondents, and 2 North Carolina respondents did not have readily identifiable positions on the issue under study and are excluded from the calculation. (Louisiana, winning n = 45, losing n = 10; Tennessee, winning n = 24, losing n = 36; North Carolina, winning n = 43, losing n = 23). *In Louisiana, the survey scale was “Least influential” (1) to “Most Influential” (7).

Source: Survey results. Authors’ calculations.

may bias the survey results. Our respondent pool in each of the three research sites included individuals who were supportive of the school choice issues of interest in the survey and those who were not. If individuals who support the policy of interest assign ratings to the advocacy groups that systematically differ from those assigned by individuals who oppose the policy, then it becomes more critical to have a representative sample of respondents from the winning and losing sides of the policy debate. In particular, we might expect to find that respondents on the winning side of the policy debate assign higher ratings to winning groups—in essence giving themselves more credit for a victory than their opponents would.

We tested the statistical significance of the difference between the average influence rating assigned by those on the winning side of the policy issue to the average influence rating assigned by those on the losing side of the policy issue. In states where the policy of interest passed, advocacy groups that supported that legislation are deemed “winners” and those that opposed the legislation are deemed “losers.” In states where the policy of interest did not pass, advocacy groups that supported the legislation are deemed “losers” and those that opposed the legislation are deemed “winners.”

As shown in Figure 2, there were generally no statistically significant differences in the way that winning respondents and losing respondents rated either winning groups or losing groups on average. For example, winning respondents distributed ratings to winning groups in Louisiana that were similar to the ratings distributed to those organizations by losing respondents. The only instance in which differences in ratings were statistically significant between winning and losing respondents was in Tennessee. In that state, losing respondents—pro school choice respondents—assigned higher influence ratings to losing advocacy groups than did winning respondents—those who oppose school choice. Winning advocacy groups received similar scores from both winning and losing respondents.

Do influence ratings differ by respondent type?

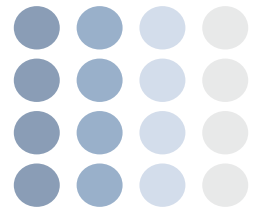
Answering this question provides insights regarding whether securing responses from political insiders can generate information that is similar to the information that is generated from legislator responses. This is important to know because securing legislator responses is both more expensive and more labor intensive than collecting responses from political insiders, and the response rate for legislators still lags the response rate of political insiders. Thus, if these two groups provide similar information, then the tool could be administered only to political insiders in the future, reducing its overall cost.

We test the statistical significance of the difference between the average influence ratings that legislators and political insiders assigned to pro school choice groups and anti school choice groups across the three states. As depicted in Figure 3 on page 16, our comparisons show that there are no statistically significant differences between the influence scores assigned by legislators and by political insiders to pro school choice groups or anti school choice groups as a whole. This finding holds across all three research sites without exception.

Are advocacy groups attributed different levels of influence across stages of the policymaking process?

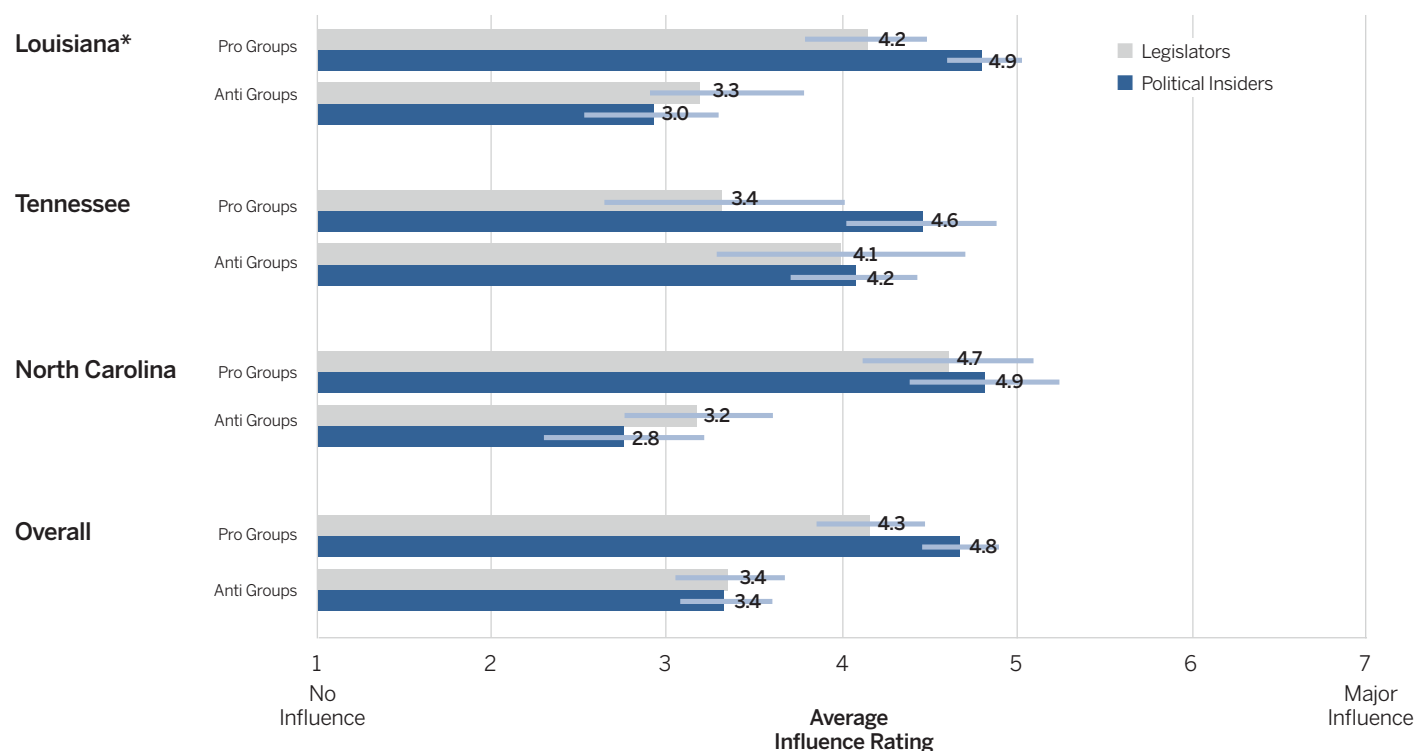
Advocacy groups work to exercise influence across various stages of the policymaking process, with some groups participating heavily in certain stages without engaging in others. Ideally, the SwP would be able to distinguish influence that occurred during different stages of the policymaking process. This would enhance the flexibility of the tool, giving us confidence that it could differentiate influence that shaped the content of the bill from influence that impacted whether the bill ultimately became law.

The refinements made to the SwP in year two allow us to answer this question by comparing the scores that advocacy groups received on a question regarding their influence over legislative content—a



There are no statistically significant differences between the influence scores assigned by legislators and by political insiders to pro school choice groups or anti school choice groups as a whole.

Figure 3. Legislator and political insider-reported advocacy group influence ratings



Note: Figure 3 shows mean influence ratings for respondent types: legislators and political insiders. Thin light blue bars show 95% confidence intervals around each mean. (Louisiana, legislator n = 25, political insider n = 39; Tennessee, legislator n = 16, political insider n = 48; North Carolina, legislator n = 32, political insider n = 36). *In Louisiana, the survey scale was "Least influential" (1) to "Most Influential" (7).

Source: Survey results. Authors' calculations.

policy formulation stage—to their scores on a question regarding their influence on increasing legislative support for or opposition to the policy of interest—the decision making stage.

Our results show that the opposition groups were less effective with regard to influencing content, but were just as, if not more, effective at influencing the policy outcome, depending on the research site. Figure 4 plots each advocacy group's influence score (influence rating of the group—influence rating of the placebo) on content and support or content and opposition, as appropriate. The pro groups across the states clustered together, indicating that respondents rated them similarly differently from the placebo in their respective states. As the figure makes

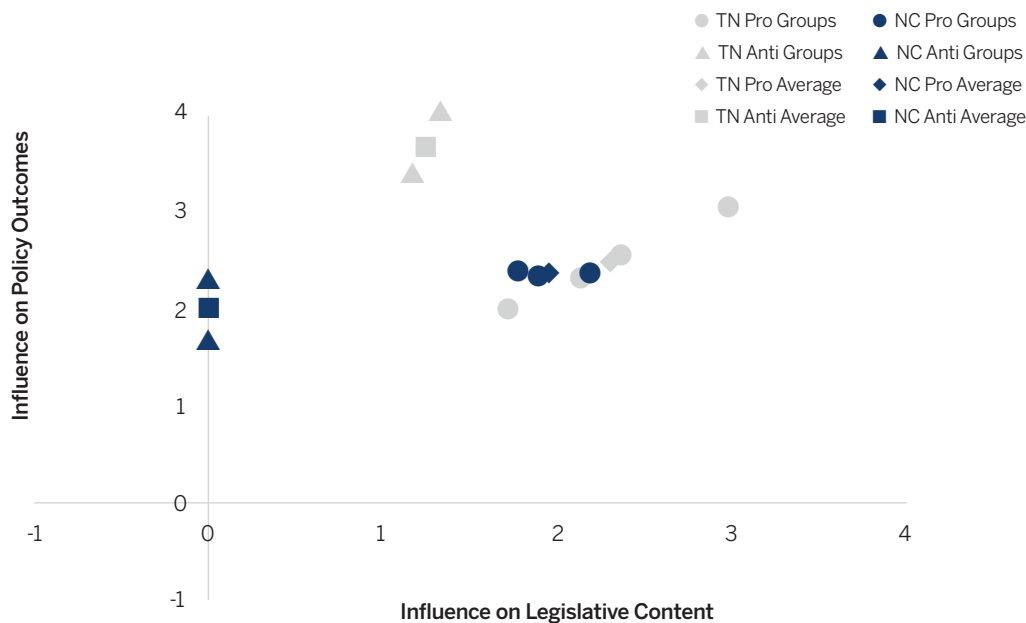
obvious, in both Tennessee and North Carolina, anti school choice groups received lower scores on their influence over the bill content than their influence on increasing opposition when compared to the placebo. In both contexts, this makes sense: anti school choice groups were commonly opposed to the concept of the bill entirely and were thus more likely to engage in the decision making stage by attempting to increase legislative opposition to the bill rather than attempting to tweak the policy content during the policy formulation stage.

Pro school choice advocacy group scores were also significantly different on the two questions, but these organizations received higher marks for their influence on increasing support than their influence

on the legislative content. In some cases, this is a somewhat surprising finding when triangulated against our on-the-ground work. In North Carolina, one advocacy group that indicated that it only worked in the area of influencing the bill's content is rated similarly on influencing the content of the bill and increasing support for the legislation. In this case, it may be that respondents thought of the

group's push for changes to the content of the bill as efforts to increase support for the bill's passage and were unable to distinguish between the two types of influence.

Figure 4. Influence Scores of Pro and Anti School Choice groups in the Policy Formulation and Decision Making Stages



Note: Figure 4 shows the difference between advocacy groups' influence ratings and the influence ratings assigned to the placebo. The influence on legislative content is equal to the advocacy group mean rating minus the placebo rating. The influence on policy outcome is equal to the advocacy group mean rating on support minus the placebo rating on support for pro groups, and the advocacy group mean rating on opposition minus the placebo rating on opposition for anti groups. Groups that fall on an axis were not significantly different from the placebo on that scale. Means presented are means used in paired t-tests

Source: Survey results. Authors' calculations.

Critical Path Findings

In year one of our work, we focused on identifying critical paths of influence that linked tactics implemented by the Louisiana advocacy groups of interest to the final policy outcome: passage of the school voucher legislation in the decision making stage of the policymaking process. These tactics aligned with three channels of influence: personal (personal communication, political support); informational (research materials, seminars and events); and indirect (grassroots campaigns, media outreach).

In year two, we expanded the focus of our work to examine policy outcomes associated with multiple stages in the policy process, not just the decision making stage. This allows us to capture some of the work that advocates do before the policy actually comes to a vote, such as promoting the issue on the legislative agenda and influencing policy content. We continue to focus on tactics from the personal, informational, and indirect channels. Below, we outline three examples of critical paths that arose from our study in year two sites, one that aligns with each of the phases of the policymaking process we explored. Each of these tactics was part of a broader strategic push toward the outcome described, though only select tactics are included in this report.

These illustrative paths point to the range of tactics that advocates

use and exemplify broader themes. For example, information provision was a commonly described tactic during the agenda setting stage, while grassroots activities were more common during the decision making stage.

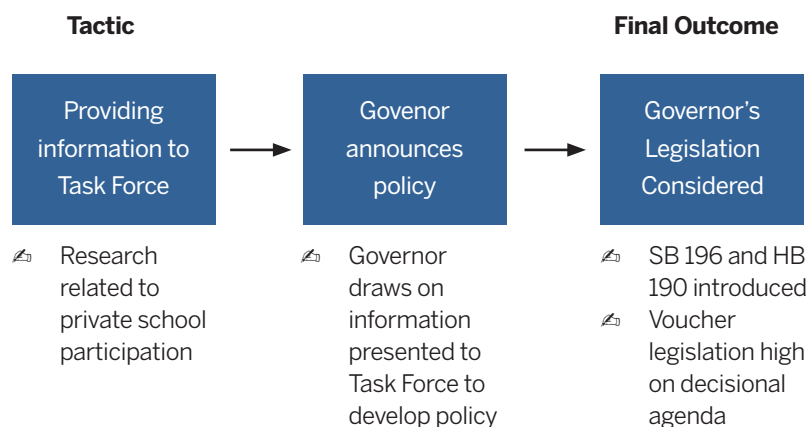
Agenda Setting Stage

A major issue discussed by advocacy groups we spoke with in Tennessee was the need to promote or keep the voucher issue on the legislative agenda. While the issue of vouchers had been an active one in Tennessee for several years, the issue reached its peak prominence once the Governor took an active role by introducing his own piece of legislation. One of the ways that advocacy groups worked to improve the position of the voucher issue on the legislative agenda was by equipping the Governor's office with information that could help him in the development of legislation.

Tactic: Providing information to Governor's Task Force

Figure 5 depicts one of the tactics employed by advocacy groups in Tennessee as part of the agenda setting stage. An advocacy group of interest provided information to the Governor's Task Force

Figure 5. Influence path of information provision in the agenda setting stage



on Opportunity Scholarships that met in 2012. This information strengthened the Governor's ability to craft his voucher legislation, resulting in the placement of the issue high on the decisional agenda in the 2013 legislative session.

The advocacy group delivered relevant information about key factors related to potential private school participation in voucher programs, including issues related to available seats, tuition, and testing. The information provided by the group was included in the task force's report to the Governor and his office also received additional follow up information from the group about other issues including the provision of school meals and transportation—two issues that opponents to private school choice commonly use to argue that a voucher program will not serve the types of students it is intended to serve. Information from this group contributed to the Governor's ability to formulate and introduce a voucher proposal in the 2013 legislative session. With the state's chief executive pushing for a voucher program, the issue was placed high on the decisional agenda for the session.

To validate this path of influence, we sought evidence from the minutes of the Task Force on Opportunity Scholarships meetings, the working group's final report to the Governor, public comments made by Governor Haslam, and interviews with legislators and political insiders. We found materials in the task force report that reflect the information gathered by the organization that executed this tactic.²³ According to media reports and his own public comments, the Governor drew on the task force recommendations along with other studies of the issue in developing the legislation that he introduced in 2013.²⁴ One political insider who was knowledgeable about the process by which the Governor developed the legislation specifically described the contributions of the advocacy group that conducted this tactic as helpful to the process.²⁵ Legislators and political insiders commonly referred to the legislation as being "the Governor's bill." Highlighting the impact that having a bill promoted by the state's chief executive can have, one legislator said that it is easier for legislators to coalesce around an administration bill,²⁶ while a political insider emphasized the fact that no voucher legislation had ever passed a House committee in

Tennessee before the Governor became involved in the issue.²⁷ Another legislator who was a long-time supporter of parental choice said that when the governor got involved, it elevated the issue.

Policy Formulation Stage

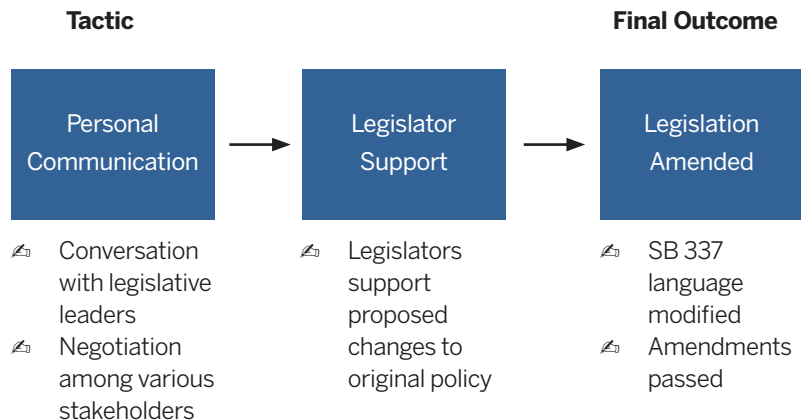
Advocacy groups in every research site implemented a variety of tactics aimed at shaping the final content of policy proposals moving through their state's legislature. These tactics often included direct communication between advocates and key policymakers, sometimes in the form of personal meetings aimed at persuading lawmakers to make amendments to a bill. At other times, advocates worked to convince legislators to refrain from pursuing changes. Advocacy groups sometimes framed their work as brokering agreements among lawmakers and other stakeholders in order to make the policy more politically palatable or more likely to be effective once implemented. As an example of tactics pursued in this policy stage, one advocacy group in North Carolina described how it worked through ongoing conversations with lawmakers to modify the content of the legislation under study to be more reflective of their policy goals and more responsive to the political situation in the state.

Tactic: Personal communication with stakeholders to shape policy content

Figure 6 on page 20 depicts one of the tactics employed by advocacy groups in North Carolina as part of the policy formulation stage. An advocacy group of interest engaged in personal communication with key stakeholders in order to negotiate changes to the policy content of SB 337 and build legislative support for those changes. The bill language was ultimately amended to reflect these desired changes.

An advocacy group of interest worked with legislators and other key stakeholders to guide changes to the bill's content after it was introduced. In particular, members of the organization's staff communicated among policymakers and other key stakeholders, including other advocacy groups, and advised leaders on how the policy could be modified. Through these ongoing communications, the group was able to share information about stakeholder positions, develop strategies with legislators around how to

Figure 6. Influence path of personal communication in the policy formulation stage



navigate the process of altering the bill, and generate the necessary policymaker support for bringing about those changes. With this support in place, the bill's content was amended as it moved through the legislative process.

In order to collect evidence to verify this path, we interviewed leaders of other engaged advocacy organizations along with legislators in positions close to the process, including members of the education committee and conference committee on the bill regarding how the content of the legislation was shaped over time. While advocacy group leaders often pointed to their own group as the major driver behind the content of the bill, legislators frequently mentioned several organizations, each of which was included in the survey, as important players in the development of the final policy. For example, one legislator indicated that another advocacy group's lobbyist sat in on conference committee meetings.²⁹ Some evidence from these interviews does, however, point to the advocacy group that implemented this tactic as being a particularly important player in negotiating changes to the bill and activities like those described by the organization as playing an important part in the process. For example, one legislator that served on the conference committee described the group as playing a major role in negotiating among stakeholders,³⁰ and other

legislators identified the group as one of the driving organizations on the issue and indicated that groups were working "behind the scenes at the top levels" to make the bill happen—a description matching that of the group implementing this tactic.³¹

Decision Making Stage

Advocacy groups not only worked to keep their target issue on the policy agenda and to shape the content of the policy under consideration, they also implemented tactics meant to move the legislation through the necessary committee and floor votes and have it signed into law. Among the tactics employed, grassroots activities were popular across two of our three research sites, and were sometimes differentiated to target policymakers from certain areas or with certain political affiliations. In one example, grassroots activities were specifically geared toward establishing a consistent presence of supporters at the capitol in order to build support for legislation.

Tactic: Grassroots activities to build a steady pressure

As shown in Figure 7, one of the advocacy groups of interest in Tennessee worked through personalized and continuous grassroots activities in order to mobilize supporters throughout the 2014 session. Organization leaders hypothesize that these activities worked to build support for the voucher initiative, maintain support among champions, and promote bill passage in the Senate and House.

The advocacy group that implemented these grassroots tactics was less focused on large-scale events and more focused on generating a steady grassroots presence both at the capitol and in legislator districts, supplemented by calls to action at critical points in the process. The organization hypothesized that by working through grassroots mobilization, they could influence the overall conversation around education reform, strengthen supporters, sway uncertain legislators toward support, and impact opponents.

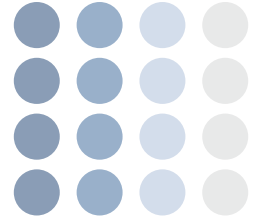
In building their grassroots support base, the group sponsored and attended events in key areas of the state and among important constituencies. They

had informational booths at conferences, organized and participated in town hall meetings to answer questions from the public, and reached out to people who responded positively to their social media posts about school choice to give them opportunities to amplify their voice on the issue.

To engage supporters that had been identified through these activities, they invited their grassroots members to sign up for personalized visits to the legislature. Through this invitation, the group hosted about 30 grassroots supporters at the capitol over the course of the session. For each visit, the advocacy group crafted an individualized itinerary that included a mix of meetings with the visitor's legislative delegation, education committee hearings, legislative floor sessions, and conversations with legislators who support the group's education reform agenda. The organization also issued calls to action targeted to specific members of key committees, such as the House Finance Committee, to which their grassroots members responded by sending hundreds of emails at critical junctures. Through these and other efforts,

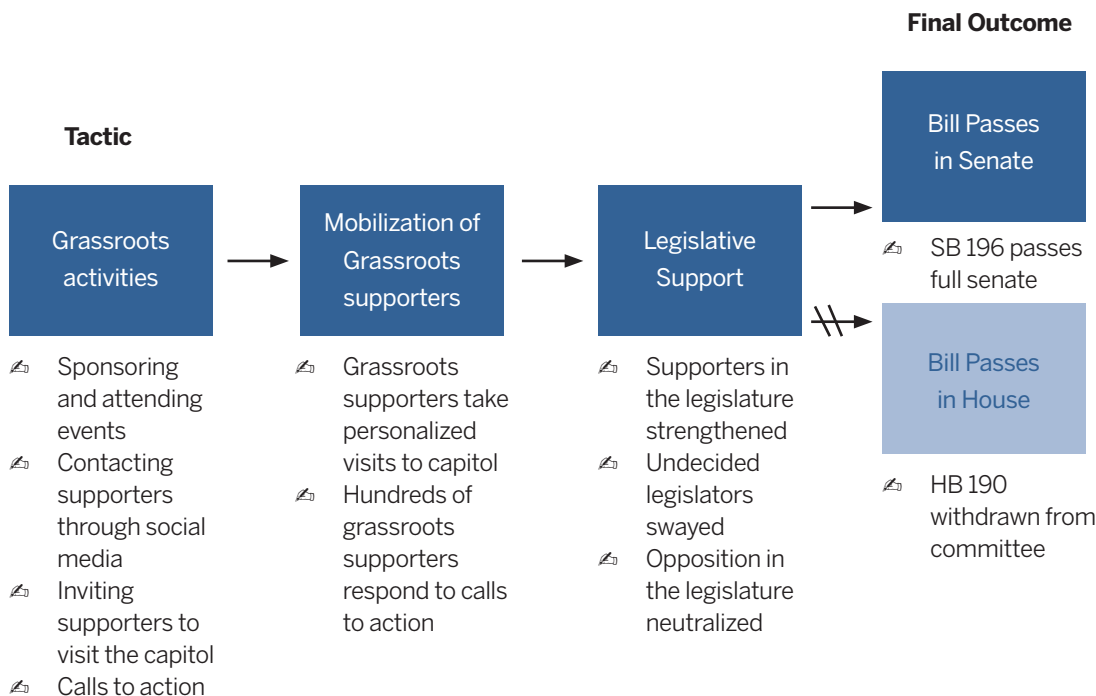
the advocacy group worked to reaffirm supportive legislators and sway undecided legislators toward supporting the voucher initiative. The legislation passed with bi-partisan support in the Senate and through some of the key committees in the House, but was withdrawn from the House Finance Committee.

To gather evidence to validate this path of influence, we reviewed publicly available documents regarding the group's grassroots activities, interviewed legislators who were targeted by this tactic, and interviewed other political insiders with critical roles surrounding the bill. Legislators that we interviewed often pointed to authentic contact from their constituents, not the general public, as being a powerful influence on their legislative activity. For example, one legislator indicated that if he receives ten to twenty contacts from his district, he would consider that a "tidal wave" of support.³² Speaking in the media, one of the few Democratic champions of voucher legislation described experiencing



Legislators that we interviewed often pointed to authentic contact from their constituents not the general public, as being a powerful influence on their legislative activity.

Figure 7. Influence path of grassroots activities in the decision making stage



a major outpouring of grassroots support, though not necessarily through the tactics implemented by this organization.³³ Another legislator with whom we spoke said that the organization of interest in this path brought a supporter by his office in an attempt to encourage him to support the legislation, but indicated that this activity was not effective because he found the constituent not to be knowledgeable about the legislation, and he continued to oppose the bill.³⁴

This same legislator described grassroots advocacy groups in the state as creating a “virtual rally” on the issue through social media and online initiatives—activities consistent with those described by the advocacy group examined in this path. The legislator indicated that this activity’s primary impact was to raise awareness about the issue.³⁵ This is consistent with one of the long-term goals that the organization studied here discussed: impacting the broader education conversation and elevating the priority that policymakers place on education issues. Overall, while many legislators and political insiders with whom we spoke indicated that authentic communication from a legislator’s direct constituents is an influential factor in voting decisions and that members of the public did contact legislators regarding the voucher legislation, they often portrayed grassroots involvement on the issue of vouchers in Tennessee as somewhat minimal. However, it is possible that grassroots support was ultimately successful in influencing some key votes in the House, but because the bill never made it to a full floor vote, it is difficult to know with certainty whether these actions would have had an impact on securing passage of the bill.

Highlights of Results and Implications

Findings with respect to methods and measures

- The Survey with Placebo (SwP) can detect meaningful differences in the perceived influence of advocacy groups and between the actual influence groups vs. the placebo organization.
- Respondents to the SwP generally separate their own positions as supporters or opponents of the legislation from their ratings of influence. Thus, the average influence ratings of pro or anti groups do not differ statistically depending on the respondent’s position on the policy issue. Further, organizations on the winning side of a legislative battle are typically perceived by all respondents to be more effective than those on the losing side. These findings provide important support for the validity of the SwP in that ratings track specific outcomes.
- Legislators provide ratings of influence through the SwP that do not differ statistically from ratings provided by political insiders who are not in the legislature when considering pro or anti groups as a whole. This finding is of practical significance because the response rate to the SwP is much higher from political insiders than it is from legislators. Future uses of the SwP can be more efficient by surveying only political insiders.
- A short form of the SwP, which can be administered in less than five minutes, produces ratings of overall influence that

are highly correlated with findings from longer forms that can take up to 30 minutes for an individual to complete. Thus, we have developed a tool that can be used by a variety of interested parties to evaluate the influence of various advocacy efforts that is practical because of its low time burden on respondents.

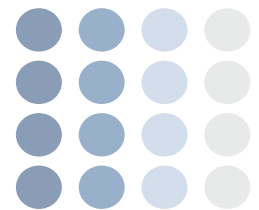
- Critical Path Analysis (CPA) with advocacy group leaders and with those playing critical roles in the political process surrounding the issue of interest reveals significant information that cannot be gathered through the SwP. For example, one learns how a particular advocacy organization goes about generating grassroots support and focusing it at times and places that have political leverage. The expense and labor required to conduct the CPA makes it impractical to pursue on a regular basis, but interested parties may consider leveraging this method in sites where they are particularly interested in developing a better understanding of the advocacy environment and the specific strategies that advocates deploy.

Findings with respect to the influence process

- The advocacy organizations we studied are a clearly recognized influence within each of the respective states. They have an impact on the introduction of policy into the legislative arena, the content of legislation, and the votes of members of the legislature.
- The impact of advocacy organizations is conditional on powerful political actors taking positions that open the door to supportive advocacy activities. For example, voucher legislation in Louisiana and Tennessee would likely have received less legislative attention but for the leadership of the governor of each state. Likewise, the overwhelming one-party control of the North Carolina legislature

was likely a precondition for the legislative action on charter schools around which advocates organized, even though the bill that eventually passed received bipartisan support.

- Coordination and role differentiation among advocacy organizations that have related policy goals strengthens total impact. In Louisiana, for example, one of the advocacy groups focused on obtaining coordination and cooperation among all advocacy groups supporting the legislation. This allowed the resources of each group in the coalition to be focused on what it could do best, lessened the likelihood that critical actions such as building visible grassroots support would fall between the cracks, and provided opportunities for privately working through conflicts in policy goals among the advocacy organizations.
- Perceived influence closely tracks outcomes. When the policy of interest is not passed into law, opponents are credited with substantially greater influence than in sites where the policy is successful.
- The effort to influence political outcomes, just like politics itself, is local. For example, approaches appropriate to a state in which the governor is the dominant political force with respect to the legislation of interest, as was the case in Louisiana, will be different than in a state in which the legislature is more powerful, as was the case in North Carolina.
- Advocacy organizations that are nominally in the same camp in terms of being supporters or opponents of a piece of legislation frequently have different goals in terms of the line item content of a bill. For example, the North Carolina Alliance for Public Charter Schools and the North Carolina Public



The impact of advocacy organizations is conditional on powerful political actors taking positions that open the door to supportive advocacy activities. For example, voucher legislation in Louisiana and Tennessee would likely have received less legislative attention but for the leadership of the governor of each state.

Charter Schools Association differed on the provision of Senate Bill 337 that would have created a Charter School Advisory Board independent of the State Board of Education. Contradictory messaging or publicly visible discord among advocacy organizations that legislators may think of as part of the same pro-legislation team provide openings that opponents exploit in their own advocacy efforts.

- Achieving bipartisan support for education reform legislation is enhanced by understanding and appealing to the motives of different camps of potential supporters. For example, there are groups of people that support charter schools because they believe in a market-based approach to reform, others with populist leanings that are motivated by the opportunity to achieve more equitable access to good schools for children from low-income and minority families, and still others that support charters as laboratories meant to test new approaches and share those with public schools. Advocacy efforts that are tailored to these unique interests are likely to be more successful than a one-size-fits-all approach.

Endnotes

- 1 Andreas Dur, "How Much Influence do Interest Groups have in the EU? Some Methodological Consideration," in *Opening EU Governance to Civil Society: Gains and Challenges*, edited by Beate Kohler-Koch, Dirk De Bievre and William Maloney. (Mannheim, Germany: CONNEX, 2008).
- 2 In year two sites, a second placebo was also included in order to test whether the placebo's name may influence its rating. It is not included in the counts shown in Table 1.
- 3 Road to Educational Achievement (REACH) is a shortened version of the name of an actual advocacy group active in Pennsylvania, Road to Educational Achievement through Choice. However, this organization was in no way involved in the influence process under study in any of the three states, and should stand as a valid reference point for "zero influence."
- 4 Andrew Bennett. "Process Tracing and Causal Inference," in *Rethinking Social Inquiry: Diverse Tools, Shared Standards*, 2nd ed., edited by Henry E. Brady and David Collier, pp. 207–19. (Lanham, Md.: Rowman and Littlefield, 2010).
- 5 Frameworks describing stages in the policymaking process vary in the terminology and number of stages utilized. They also generally include stages beyond the decision making or adoption phase, such as implementation and evaluation. While some of the advocacy groups under study launched activities aimed at these later stages, the bulk of their work in these research sites were focused on the first three stages described: agenda setting, policy formulation, and decision making. Thus, we do not include descriptions of tactics implemented in relation to post-decision making stages.
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- 7 "Our Mission & Goals." *Louisiana Association of Business and Industry*, accessed December 18, 2014. (<http://labi.org/labi/mission-goals>).
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- 19 "About TEA." *Tennessee Education Association*, accessed December 18, 2014. (<http://www.teateachers.org/about-tea>).
- 20 Tennessee Federation for Children, "About Us," Facebook, accessed November 17, 2014. (<https://www.facebook.com/pages/Tennessee-Federation-for-Children/406172906126100>).
- 21 "Mission and Goals." *Tennessee School Boards Association*, accessed November 17, 2014. (http://www.tsba.net/About_TSBA_Affiliates/Our_Mission_and_Goals).
- 22 There were instances when organizations that may have had little involvement in a particular stage of the policy making process were not rated differently than the placebo. For example, anti groups in North Carolina were identified as having an influence no different than that of the placebo on the content of the legislation.
- 23 Task Force on Opportunity Scholarships, *Task Force on Opportunity Scholarships Draft Report*, November 2012, (<http://blogs.edweek.org/edweek/charterschoice/TNreport.pdf>).
- 24 Richard Locker, "School voucher bill appears dead in Tennessee legislature," *Commercial Appeal*, April 15, 2014, (<http://www.commercialappeal.com/news/local-news/school-voucher-bill-appears-dead-tennessee-legisla>); Associated Press, "Text of Gov. Bill Haslam's State of the State address," *Times Free Press*, Jan. 29, 2013, (<http://www.timesfreepress.com/news/2013/jan/29/text-gov-bill-haslams-state-state-address-tn/>).
- 25 TN Political Insider A, interview by Claire Graves, October 9, 2014.
- 26 TN Legislator A, interview by Claire Graves, October 3, 2014.
- 27 TN Political Insider B, interview by Claire Graves, October 9, 2014.
- 28 TN Legislator B, interview by Claire Graves, October 9, 2014.
- 29 NC Legislator A, interview by Claire Graves, June 24, 2014.
- 30 NC Legislator A, interview by Claire Graves, June 24, 2014.
- 31 NC Legislator B, interview by Claire Graves, June 25, 2014.
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- 33 Stephanie Scurlock, "More African Americans Push for School Voucher Program," *WREG*, Jan. 24, 2014, (<http://wreg.com/2014/01/24/more-african-americans-push-for-school-voucher-program/>).
- 34 TN Legislator C, interview by Claire Graves, October 7, 2014.
- 35 TN Legislator C, interview by Claire Graves, October 7, 2014.

Appendix A

Study of **EFFECTIVE EDUCATION ADVOCACY**

This survey is designed to assess the influence of advocacy groups on the school voucher legislation known as the Tennessee Choice and Opportunity Scholarship Act (Senate Bill 196 / House Bill 190) that was under consideration during the 2013-2014 session of the Tennessee General Assembly.

The questions in this survey will ask you to rate advocacy groups in the following areas: influencing the content of the legislation, increasing support for the legislation, and increasing opposition to the legislation.

Rather than considering the amount of influence that these advocacy groups may have had on your personal stance on the legislation, please consider their broader influence on the legislation.

Refresher on the Tennessee Choice and Opportunity Scholarship Act (Senate Bill 196 / House Bill 190)

- Would have allowed a limited number of low-income students in the state's bottom five percent of schools to receive vouchers that could be used to attend private schools
- Passed the Senate on April 10, 2014
- Withdrawn from the House Finance Committee on April 15, 2014

1. How knowledgeable are you regarding the influence of advocacy groups on the recent legislative activity related to school vouchers in Tennessee?

- ☐ Very knowledgeable
- ☐ Knowledgeable
- ☐ Somewhat knowledgeable
- ☐ Not at all knowledgeable
- ☐ Unsure

2. Please rate the amount of influence the following advocacy groups had on the legislative **CONTENT** of Senate Bill 196 / House Bill 190 (school voucher legislation).

	No Influence 1	2	3	Moderate Influence 4	5	6	Major Influence 7
Tennessee School Boards Association (TSBA)	①	②	③	④	⑤	⑥	⑦
Tennessee Federation for Children (TFC)	①	②	③	④	⑤	⑥	⑦
Road to Educational Achievement (REACH)	①	②	③	④	⑤	⑥	⑦
StudentsFirst	①	②	③	④	⑤	⑥	⑦
School Choice Now	①	②	③	④	⑤	⑥	⑦
Beacon Center of Tennessee	①	②	③	④	⑤	⑥	⑦
Tennessee Education Association (TEA)	①	②	③	④	⑤	⑥	⑦

(Survey continues on following pages.)

3. Please rate the amount of influence the following advocacy groups had on increasing **SUPPORT** for Senate Bill 196 / House Bill 190 (school voucher legislation) within the General Assembly.

	No Influence 1	2	3	Moderate Influence 4	5	6	Major Influence 7
Tennessee School Boards Association (TSBA)	①	②	③	④	⑤	⑥	⑦
Tennessee Federation for Children (TFC)	①	②	③	④	⑤	⑥	⑦
Road to Educational Achievement (REACH)	①	②	③	④	⑤	⑥	⑦
StudentsFirst	①	②	③	④	⑤	⑥	⑦
School Choice Now	①	②	③	④	⑤	⑥	⑦
Beacon Center of Tennessee	①	②	③	④	⑤	⑥	⑦
Tennessee Education Association (TEA)	①	②	③	④	⑤	⑥	⑦

4. Please rate the amount of influence the following advocacy groups had on increasing **OPPOSITION** for Senate Bill 196 / House Bill 190 (school voucher legislation) within the General Assembly.

	No Influence 1	2	3	Moderate Influence 4	5	6	Major Influence 7
Tennessee School Boards Association (TSBA)	①	②	③	④	⑤	⑥	⑦
Tennessee Federation for Children (TFC)	①	②	③	④	⑤	⑥	⑦
Road to Educational Achievement (REACH)	①	②	③	④	⑤	⑥	⑦
StudentsFirst	①	②	③	④	⑤	⑥	⑦
School Choice Now	①	②	③	④	⑤	⑥	⑦
Beacon Center of Tennessee	①	②	③	④	⑤	⑥	⑦
Tennessee Education Association (TEA)	①	②	③	④	⑤	⑥	⑦

Below is a list of five political actors in Tennessee.

5. Please rate the amount of **OVERALL** influence the following actors had on increasing for Senate Bill 196 / House Bill 190 (school voucher legislation) within the General Assembly.

	No Influence			Moderate Influence		Major Influence	
	1	2	3	4	5	6	7
Governor's Office	①	②	③	④	⑤	⑥	⑦
State Board of Education	①	②	③	④	⑤	⑥	⑦
Constituents (General Public)	①	②	③	④	⑤	⑥	⑦
Advocacy Groups	①	②	③	④	⑤	⑥	⑦
Civic Leaders	①	②	③	④	⑤	⑥	⑦

Thank you for promptly returning this survey to us in the enclosed postage-paid envelope.

Acknowledgment and Conflict of Interest Disclaimer



This project was supported by a grant to the Brookings Institution from the Walton Family Foundation, which makes significant investments in organizations that engage in education advocacy. With the exception of its initial decision to fund the program of work of which this report is a part, the Walton Family Foundation has had no involvement in the activities carried out by the authors that are represented in this report.

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Brown Center on Education Policy
The Brookings Institution
1775 Massachusetts Ave., NW
Washington, DC 20036
Tel: 202.797.6090
Email: browncenter@brookings.edu

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