



STATE SPECIAL EDUCATION LEGISLATIVE SUMMIT TOOLKIT

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Oklahoma Division on Career Development and Transition

Actively engage in critical issues facing our field, build advocacy knowledge and skills, and advocate on behalf of students with disabilities directly with legislators.

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Overview of the State Special Education Legislative Summit Toolkit

Countless education stakeholders do not realize the role they can play in promoting change at the state legislative level (much less at the federal level) and often feel they cannot because of supposed rules, or they simply do not know how. However, it is those education stakeholders (i.e., preservice educators, special educators, other professionals, and family members) who have a collective voice—a voice that can create change and be heard by state legislators. There is power in numbers.

Many educational policies are the result of compromise driven by competing agendas (Lewis & Young, 2013). However, research affirms state and federal legislation can be positively impacted through educator-driven legislative advocacy (Nagro et al., 2019). In fact, many consider education stakeholders as holding “as much responsibility for policymaking as do government officials” (Menken & Garcia, 2010, p. 4). These policies have a significant impact on students with disabilities and the teaching profession (West & Shepard, 2016). Since 2005, the decline in special education teachers has significantly increased due to the “reallocation [and investment] of teaching resources away from special education relative to general education” (Dewey et al., 2017, p. 321). Policy would likely change the way school systems serve students with disabilities and the special education teachers they employ (Dewey et al., 2017); yet, few states and education stakeholders are equipped to organize a summit as a way of becoming part of the policymaking process.

A State Special Education Legislative Summit allows education stakeholders to actively partake in critical issues facing the field of special education, build advocacy knowledge and skills, and advocate on behalf of students with disabilities. Most education stakeholders have never had opportunities for meaningful dialogue with their state legislators before votes are cast on important bills.



State legislators make decisions based on the knowledge they have; therefore, without the critical input from special educators, family members, and service providers, new regulations and mandates could drive special educators out of the profession, while services afforded to students with disabilities could decline. Whitby and Wienke (2012) stated “a call to action for all persons supporting the education of children with disabilities may be necessary to maintain the current level of services” (p. 191). Educators teach students with disabilities to self-advocate for what they need. It is time for those educators to advocate for their own professional needs. All that is needed is education, training, and encouragement, along with a systematic framework to enable those education stakeholders to use their voices to impact change.

The purpose of the State Special Education Legislative Summit Toolkit is to cultivate a strong secondary transition voice in state legislation and to help facilitate education stakeholders across the country to hold an annual State Special Education Legislative Summit. The [Oklahoma Division on Career Development and Transition State Chapter](#) offers this toolkit as a resource to establish and empower a collective voice in the field of special education. This toolkit will serve as a model for education stakeholders to develop their own State Special Education Legislative Summit. Furthermore, this toolkit will help those individuals create additional year-round legislative activities to ensure the State Special Education Legislative Summit efforts continue despite turnover in board leadership.





Section 1

Planning the State Special Education Legislative Summit

Rationale

You might be asking yourself these questions:

1. Why should we consider holding our own State Special Education Legislative Summit?
2. What can be gained by having such an event?
3. Who will do the work to actually pull it off?

The [Oklahoma Division on Career Development and Transition](#) reestablished its state chapter after several years of inactivity and wanted to do something outside the typical events of a state-level professional group. The board leadership and active members decided to model a state-led effort after the Council for Exceptional Children's National Special Education Legislative Summit.

Existing Summits and Other Advocacy Examples

Several professional organizations include an advocacy day on Capitol Hill in Washington, DC. Such organizations include the [Council of State Administrators of Vocational Rehabilitation](#), [National Rehabilitation Association](#), and [Higher Education Consortium for Special Education](#).

Additionally, the [Council for Exceptional Children](#), in collaboration with the [Council of Administrators of Special Education](#), hosts an annual Special Education Legislative Summit in Alexandria, VA, and Washington, DC, each summer. Participants spend time learning about advocacy and education as well as the hot topics to be shared with elected officials on The Hill. The Council for Exceptional Children has its own advocacy section on their website with tools and resources to help anyone learn to advocate with state and national leaders. Visit the Council for Exceptional Children's [Legislative Action Center](#) to (a) [sign up for their email action alerts](#), (b) find out about [hot legislative topics impacting special education](#), (c) learn about the Council for Exceptional Children's [position on specific bills](#), (d) find your elected officials, and (e) submit electronic public comment to your elected officials, or use the language to develop your own letters to send to your elected officials.

Prior to taking part in advocacy endeavors, participants should learn about relevant topics, positions on such topics, and acquire the tools and strategies for visiting with their state legislators. While spending time visiting with their senators and representatives, participants should discuss important issues impacting the field of special education and tie in personal stories and experiences, especially those from the home area of the state legislators with which they are speaking. Participants engage in advocacy and education-not lobbying, as will be discussed late in this toolkit.

Considerations

1. Why should we consider holding our own State Special Education Legislative Summit?

- To take a position on relevant topics impacting students with disabilities;
- To have your voice heard at the state level;
- To support students with disabilities and their families;
- To help teachers and other stakeholders find their voice and realize the impact they can have by using that voice;
- To better educate your state legislators about the impact their decisions have on students with disabilities; and
- If you do not lead the efforts to advocate for students with disabilities, who will?

2. What can be gained by having such an event?

- Confidence in one's ability to make a difference;

- An educated group of advocates;
- An increase in the number of voices advocating for students with disabilities;
- Momentum on impacting change in your state;
- An ongoing event in your state which people will expect and look forward to; and
- Input in the laws impacting students with disabilities.

3. Who will do the work to actually pull it off?

- Board members;
- Other members of your organization;
- Leaders and members from partner organizations (e.g., your state's Council for Exceptional Children chapter, educational student organizations from colleges and universities, your state's developmental disabilities council); and
- Volunteers (e.g. undergraduate and graduate students, parents and parent centers).

Planning Your State Special Education Legislative Summit

Planning a State Special Education Legislative Summit should begin one year prior to the event. Identifying the date early allows sufficient time to locate facilities, schedule Day 1 speakers, and schedule meetings with state legislators on Day 2. The following are strategies for scheduling and finding a location for your State Special Education Legislative Summit.

Scheduling Your State Special Education Legislative Summit

A State Special Education Legislative Summit will take place over the span of two days: Day 1, meetings and speakers at a separate venue; and Day 2, meetings with state legislators at the state capitol. The amount of time you schedule for your State Special Education Legislative Summit should be sufficient for fostering knowledge of proposed legislation, advocacy strategies, and time to meet as teams to prepare for meetings with state legislators on Day 2.

There are several other factors to consider as well when scheduling your State Special Education Legislative Summit: (a) the availability of facilities, (b) availability of education stakeholders and state legislators, (c) legislative session (we suggest holding your State Special Education Legislative Summit in the middle of the legislative session after state legislators' committee sessions are scheduled), (d) school sites' school wide testing dates including end-of-year testing schedules, vacation breaks, and (e) other factors that may impact your scheduling needs. As soon as the date is set, send out a "Save the Date" notification to all possible participants to help them plan accordingly (see Appendix A).



WHO

WHEN

WHERE

HOW

WHY

WHAT

Key Questions to Consider When Planning and Scheduling Your State Special Education Legislative Summit

1. What facilities are available for Day 1 of the State Special Education Legislative Summit?
2. Are there funds available to support substitutes for teachers who want to attend?
3. Are districts capable of paying for substitutes?
4. Is the State Special Education Legislative Summit scheduled during any school sites' school-wide testing dates, including end-of-year testing schedules?
5. For the purpose of professional development, how much time are teachers allowed away from their classrooms?
6. Are there other professional development events with which you want to avoid a scheduling conflict?
7. Will weather impact us in any way? If yes, what type of contingency plan is put into place?

Location of the State Special Education Legislative Summit

When choosing your State Special Education Legislative Summit venue, it is important to consider proximity to the state capitol. This proximity will make it easier for state legislators to speak at your event. Furthermore, for those who need hotel accommodations, this will allow them to be near both venues (i.e., your venue for Day 1 and the state capitol for Day 2). If you are in a state that does not have many facilities available, finding the location should be your first priority.

Meeting Location for Day 1: Advocacy Training

When considering facilities for Day 1 of the State Special Education Legislative Summit, consider a place that will accommodate a large group opening session (i.e., keynote speaker) and end-of-day wrap-up remarks. In addition, scheduling smaller group breakout rooms for meetings throughout the day is ideal. This will allow for education stakeholders in specific state geographical locations to prepare their remarks when speaking to their state legislators at the state capitol on Day 2. In addition, you may want to consider a space large enough to serve lunch to your participants. We find that serving lunch onsite is important for keeping participants engaged in the State Special Education Legislative Summit and helps utilize time by providing a guest speaker and facilitating participant discussion.

Meeting Location for Day 2: State Capitol

For Day 2 of the State Special Education Legislative Summit, it is helpful to schedule a meeting place at the state capitol. This can serve as a place for state legislators to meet with your group or as a “home-base” for those holding meetings in state legislators’ offices in the state capitol. If a meeting space is unavailable in the state capitol, you may need to consider non-traditional meeting spaces, such as hallways or the state capitol cafeteria.

Securing a room at the state capitol is extremely helpful; however, meeting space can be limited. As soon as a date has been chosen for the State Special Education Legislative Summit, secure a room at the state capitol. Be prepared to possibly lose your reserved room at any point should other legislative priorities arise. If this should happen, have a contingency plan in place and a way to communicate these changes to your participants.

While at the state capitol, keep in mind you may not meet with the state legislators in their offices. Due to lack of space, additional meetings, tight schedules, and number of members in your group, you might be meeting in nontraditional locations, such as the hallway outside the state legislator's office, cafeteria, or even walking with the state legislator on their way to another meeting. Do not let that throw you off. The state legislators are listening, even though they may be multitasking or perceived as having other priorities at the time of your meeting with them.

Now that you have your date set and location identified for the State Special Education Legislative Summit, we recommend using an online registration platform to identify participants to meet their individual needs during Day 1 and Day 2 of your event and assist with scheduling appointments with their state legislators, etc. (see Appendix B).

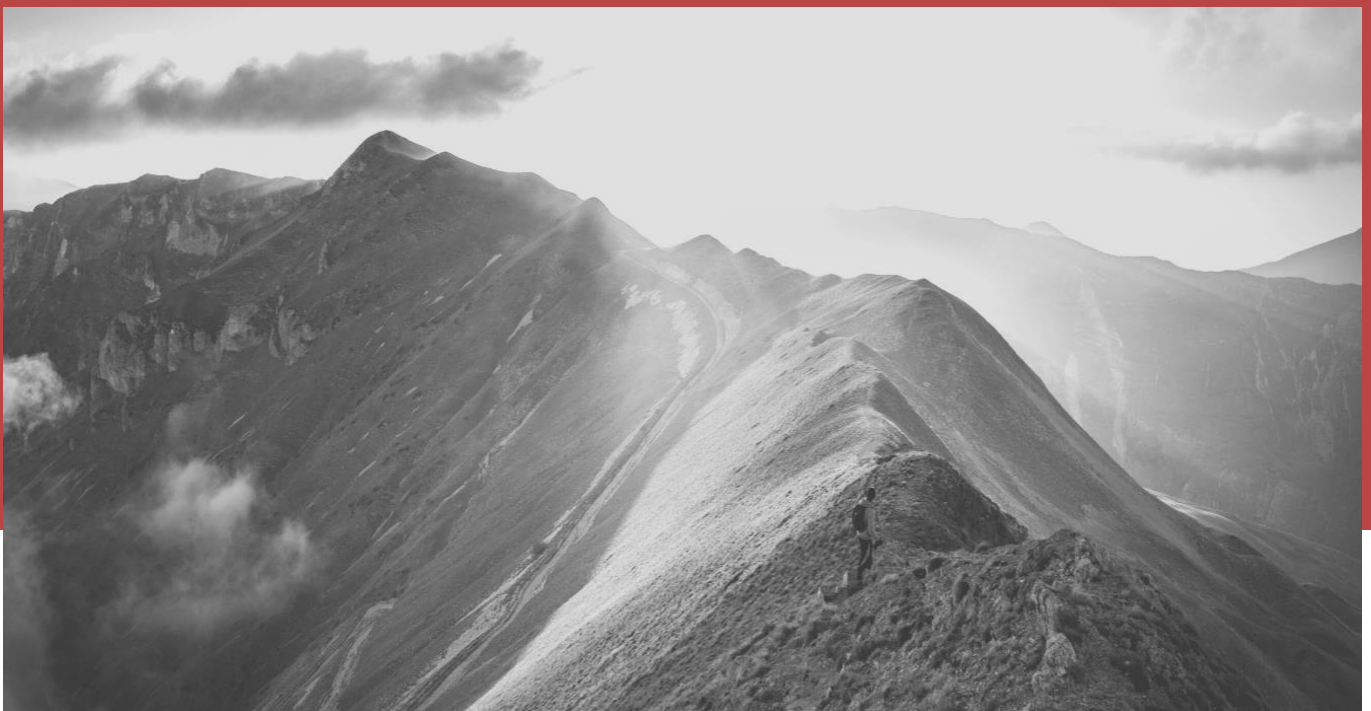
CHECKLIST



Preparing for the State Special Education Legislative Summit

Identifying the State Special Education Legislative Partners

As with any new venture, our State Special Education Legislative Summit required many partners for its realization. The Oklahoma Division on Career Development and Transition State Subdivision (OK-DCDT) brainstormed which partners to bring to the table to ensure a successful event. As a fairly new state chapter, the OK-DCDT did not have a balance in their bank account and needed to access resources that could help provide funding. In addition, we aimed to provide the State Special Education Legislative Summit without accruing a large expense and while maintaining a low registration fee. Examples of partners and resources pursued for the first State Special Education Legislative Summit included a local bank, a nonprofit organization that supports individuals with disabilities, and the Oklahoma State Unit of the Council for Exceptional Children.



PARTNERS



The [Developmental Disabilities Council of Oklahoma](#) provided funding for the meeting space on Day 1.



The [Oklahoma State Chapter of the Council for Exceptional Children](#) provided funding for lunch for participants on Day 1.



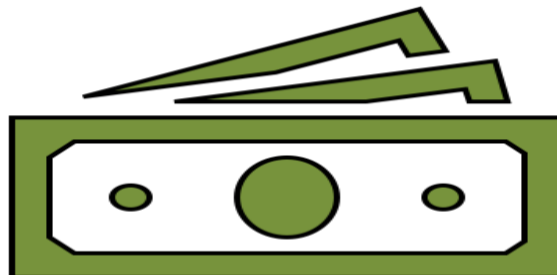
The [Oklahoma Policy Institute](#) provided speakers free of charge for Day 1.



A state legislator who was formerly an educator provided the keynote on Day 1.

We contacted [Oklahoma Partners in Policymaking](#) to provide speakers to provide our participants with instruction on advocacy. Partners in Policymaking educates participants to be active partners with those who make policy. This organization fosters the development of positive relationships with policymakers and advocates for supports and services to increase independence, productivity, and inclusion into the community for people with disabilities.

We charged a small registration fee of \$15.00 to cover lunch and materials for participants and to sustain our efforts in funding the following year's State Special Education Legislative Summit.





Determining Content for the State Special Education Legislative Summit: Targeted Bills and Laws

Research

As a planning team, it is essential team members be identified to take on the responsibility of researching the bills to be proposed. The research team members then begin to visit relevant websites to look up education-related bills for the coming year. Each state has its own website where such information can be found (e.g., in Oklahoma, it is located in the Advanced Bill Search). Once you have identified your state's legislative site, explore the site to determine where to find bills. There may be a tab, button, bullet, or other active link called "Legislation". In addition, you will want to come up with keywords to search for, such as education, special education, disability, transition, higher education, and postsecondary. Additional key search terms can be found in Appendix C.

The next task occurs throughout the planning phase. Continue to identify bills of interest and check their "current status." Be sure to select the appropriate year of the bill and see how many records are generated. Depending on when you start your search, you might end up with a list of only 100 bills; however, you might find more than 2,000 bills. Within a few days' time, Oklahoma went from 500 bills to over 2,000 bills. In that span of time, it was critical for the team to check the website daily and divvy up the responsibility for reading through the new submissions, etc.

Bills have short and full titles. Spend time reading the short title to see whether it provides enough information to pique your interest. That will help you weed out irrelevant bills. This is a time-consuming process, so many team members will need to share this responsibility. Once you open the bill of interest, you can see the full title, which will help you further decide if this is a bill relevant to your topic(s) of interest. If so, spend time reading the bill in its entirety. The introduction section of the bill may provide enough details to help you decide if this is within the scope of your purpose. If it does not meet your purpose, you can disregard it. When first introduced, a bill may only be two pages; however, in its final version, it may end up being as long as 10 pages.

Bill Development and Documentation

... checking the website daily for any new bills introduced is too much work—it must be a shared responsibility.

When you have identified bills that meet your purpose, you will want to track them. Begin developing a database where you can make notations about each bill. Google Docs is a great tool to utilize because it can store information, be shared with others, allows for real time collaboration, and is updated and saved as you go.

Whether using Google Docs, Microsoft Word, or other methods of organizing your bills, it is helpful to use track changes (or another method to highlight changes), and the Insert Comment function is helpful to maintain all bill information. With Insert Comment, you may strike through bills you decide not to use, allow others to comment, and help make notes to yourself to remember what you found in the bills, etc. Another tool would be to develop a spreadsheet in Excel (see Figure 1) with headers to correspond with information you are tracking (e.g., authors, committees, updates, summary, and hyperlink).

The comprehensive updated document with bill information should then be submitted to the planning team to have partners (a) review the document, (b) help read the bills in their entirety, (c) provide input on those they may have knowledge about, and (d) divide up who will take which bills to conduct a much more in-depth read. Sometimes, there are hidden agendas found within the body of the bill that are not able to be identified in the short or full title. Then, the bills should be organized in a way that makes sense to you. You may choose to divide them up by interest area, bill number, theme, authors, etc.

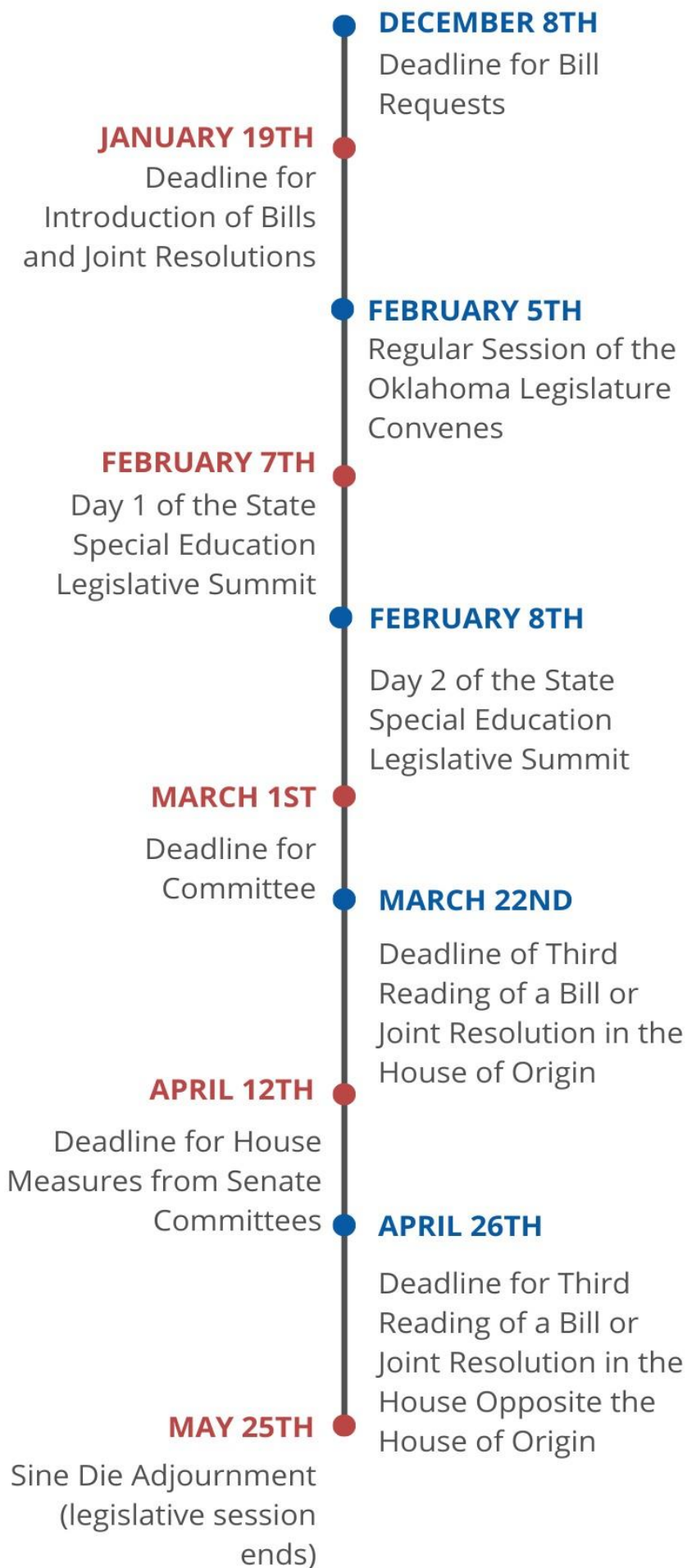
The team ultimately has to narrow down the list of bills to those meeting top priority for the State Special Education Legislative Summit. Once that list is determined, create a cleaner, more detailed document containing a brief description of each bill, author, district of the author, links to the author, bill number (most are just listed with acronym and number and not spelled out). Finally, take the document and put it in the format you want your audience to receive it, hand it out at the State Special Education Legislative Summit, and post it online for all to download.

The team may decide there are other relevant topics that are hot topics in your state at that time (e.g., teacher pay, charter schools, and education savings accounts) and may decide to include some of those bills or have a special section for those bills in a document, breakout session, etc. For example, Oklahoma had 26 teacher pay bills in 2017. We decided to share information about those bills in our comprehensive document and with the audience at the end of the State Special Education Legislative Summit. These extra bills were on the last few slides of our presentation, and participants then had enough information to pursue them further, should they have the desire.

Figure 1

Spreadsheet of Bills to be Discussed at the State Special Education Legislative Summit

Bill Number	Legislator	Introduced	Information	Link to Text
HB 3379	Rep. Miller	amending 70 O.S. 2011, Section 6-122.3	alternative teacher certification-- removes allowance of clock hours and solely allows university coursework; must have had one pedagogical course and one course on classroom management	http://webserver1.lsb.state.ok.us/cf_pdf/2019-20%20INT/hB/HB3379%20INT.PDF
HB 3389	Rep. Baker		requires OK State Bd. of Ed., CTE, and Regents to conduct a study to potentially change the number of competencies or units for graduation; to provide districts, schools, and students flexibility in choosing courses that align with their ICAPs; includes "Diploma requirements effectively serve the needs of students with disabilities"; recommendations must be made prior to 2021 legislative session	http://webserver1.lsb.state.ok.us/cf_pdf/2019-20%20INT/hB/HB3389%20INT.PDF
HB 3462	Rep. Russ		makes a hearing aid considered a prosthetic device, where previously it was not	http://webserver1.lsb.state.ok.us/cf_pdf/2019-20%20INT/hB/HB3462%20INT.PDF



Oklahoma Timeline

Legislative sessions vary by state, and timelines within sessions may vary even further. It is important to understand the timeline within your state. [In Oklahoma, one list of deadlines exists.](#) For this Oklahoma legislative session, our team had to pay close attention to these dates.

Some bills will naturally die in committee. For example, in Oklahoma 2017, many bills died by March 1st. Based on the dates above, the ideal time for Oklahoma to hold its State Special Education Legislative Summit was between March 1st and March 22nd. Holding the State Special Education Legislative Summit during this time allowed (a) the process of natural weeding out of bills that did not make it out of committee, (b) the team to focus on specific pieces of legislation identified as important, and (c) participants to communicate with their state legislators before the bills' third reading. February is too soon after the introduction of bills, and the end of March is too late to try to influence change; therefore, early- to mid-March was suggested as the ideal time.





Developing Presentation Materials

Once your team has identified all information to use/share at the State Special Education Legislative Summit, develop a PowerPoint, Sway, Prezi, or other format to project and share the information. When creating this presentation, remember to

- organize the bills by subjects;
- add hyperlinks with the bill number/changer that links to the PDF of the actual bill;
- include critical details of each bill on its own slide (including chamber and author);
- compare opposing or complementary bills and have them presented sequentially while pointing out the commonalities and/or differences in each;
- identify House bills as they start at 1000 and Senate bills start at 1;
- provide background information decisions if any bill includes information from a previous decision, supreme court decision, etc. to help make sense in relation to the current bill; and
- include social media hashtags on slides, reminders to tag the event on social media, and to use an online meeting sign-up, such as [SignUpGenius.com](https://www.signupgenius.com), [Doodle.com](https://www.doodle.com), etc. to help give more visibility to the event.

Other Considerations

- New bills can be thrown in at the last minute, so your team still needs to watch the websites for any changes even up to the day of the State Special Education Legislative Summit.
- There are also bills called shell bills that only members of the House can submit; they are a title and a placeholder for someone's special interest. These require special attention and a thorough read.
- There are many reasons a bill might not make it to the floor. Some reasons include language, financial impact, blocking by special interest groups, and blocking by state agencies.

Precautions and Tips

Do not be surprised if you or members of your planning team are approached by phone, email, or in person by special interest groups who want to either support or oppose the work you are doing. You may also receive calls from state agencies requesting information, informing you of potential changes, with concerns, or in support of specific bills. Even news reporters or state legislators may begin to reach out to you for information, not only during the planning but also after the State Special Education Legislative Summit. Be prepared with information, always maintain a neutral position, and learn as much as you can about all potential implications.

SECTION 2

Implementing the State Special Education Legislative Summit



Carrying Out the State Special Education Legislative Summit Content: Keynote Speakers, Breakout Sessions, and Content Resources

The State Special Education Legislative Summit Process

DAY 1

On Day 1, we held our event at a local CareerTech with conference space. Due to the size of the room we reserved, we capped registration at 100 participants; however, this could vary based on the size of room you reserve and how you arrange the space. Day 1 is critical as participants receive information and training on how to be an effective special education advocate. This includes

- Detailed issue briefings explaining the critical issues facing special education and general education;
- Insider perspectives from experts in education policy organizations; and
- Coaching and practice sessions delivering effective advocacy messages.



Advocacy and Finding Your Voice



1. What is advocacy?

- [Advocacy](#) can be done by an individual or group with the aim of influencing decisions at various levels. Advocacy may be conducted within educational, political, social, and economic systems. Methods of advocating can be done in person, through social media outlets, at public speaking events, media campaigns, through mailed and emailed letters, and other modes to influence public policy.

2. How is advocacy different from lobbying?

- [Lobbying](#) may include persuasion or even attempting to influence specific actions, policies, or decisions of those acting in an official capacity (i.e., state legislators and other members of regulatory agencies and groups). There are professional lobbyists trained to influence legislation, regulations, and other actions taken by the government. Sometimes lobbyists are even hired by individuals or groups to lobby on their behalf. Some nonprofit organizations also lobby as part of their volunteer efforts or as a function of their job duties. Lobbying is often defined and regulated by the government and often includes payment for services.

3. Who can be an effective advocate?

- Anyone can be an effective advocate. Effective advocates have the following skill-set (a) confidence and a good memory, (b) ability to digest large amounts of information, (c) ability to pay attention to details and tease out important facts, (d) concise and clear expression of ideas, (e) composure to present in front of various sized groups, and (f) decorum to emotionally detach from the topic and handle pressure and stress.

4. How can I advocate when I am a public school or state employee?

- Many public school teachers and state employees are unaware about the many ways they can interact with their state legislators. There may be specific rules to follow (e.g., using your personal email, not your work email, to contact them), but there are opportunities for educating state legislators about your work, your world, your students, and the impact bills and potential laws have on your students, families, and communities.

- You have to remember that most state legislators were not educators before they were elected; therefore, you play a crucial role in introducing them to your classroom and to the students you serve in their districts. Invite them for coffee and doughnuts with your class. Give them a glimpse into the daily lives of students with disabilities and all the responsibilities of special education teachers and paraprofessionals.
- Take part in events, such as State Special Education Legislative Summit, national events, and any other events that will afford you the opportunity to be face-to-face with state legislators to share personal stories, data, and impact of their decisions. The [National Conference of State Legislators](#) has useful tips for how to talk with state legislators and how to write to/for them.
- For other professionals, agencies, and organizations, invite your state legislators to community events, kick-offs for summer and other programs, end-of-year programs, summer celebrations, and anything where you can share with them the great work you are doing to help students and youth with disabilities. Similarly, invite them to areas/locations where needs are not met, codes/laws are violated, or bills they are proposing which may limit or create barriers for you and those you serve.
- Being present on their social media sites is a good way to get a glimpse of what their upcoming initiatives might be, hot topics,

and opportunities to better educate them on the area you know best.

- And, most importantly, vote. Do not pass up any opportunity to exercise your right to vote. Educate yourself as much as possible prior to any election, and do not just vote in the “big” elections. The “small” ones count, too.

***... arm yourself with
information and use it to
advocate for your students
with disabilities.***

Day 1 Agenda

<u>Time</u>	<u>Event</u>
8:30-9:00 a.m.	Registration
9:00-9:15 a.m.	Welcome
9:15-11:30 a.m.	Getting Your Legislative Groove On: Learning to Advocate with Legislators
11:30-1:00 p.m.	Lunch Provided
1:00-3:00 p.m.	Small Group Breakouts to Discuss Bills
3:00-3:15 p.m.	Closure and Adjourn





For our first State Special Education Legislative Summit, we chose to invite a member of the House of Representatives to welcome our participants. During the welcome, he described his journey from being a teacher to becoming a member of the Oklahoma legislature and his passion for public education.

The segment Getting Your Legislative Groove On: Learning to Advocate with Legislators involved participants hearing from local advocates who gave tips to be successful in advocating and the difference between advocating and lobbying. We also invited local representatives from the Oklahoma Policy Institute who shared with participants how to find their state legislators, access and use various legislative advocacy toolkits, and stay on top of action alerts, talking points, and available resources.





Day 1

The morning focused on how to advocate, while the afternoon was the time of day when participants learning about the content—the bills. All participants sat in groups in a round table set-up to facilitate conversation and planning later in the day. We began with a presentation of bills currently on the state capitol floor. Our team leader on bill research and tracking provided an overview of key bills on the floor, what their potential impact was, and how it related to the work the participants did, or the children and families with whom they interacted. Then, groups were able to discuss the various bills, identify the ones in which they wanted to dive deeper, and select key pieces of information they would then share with their state legislators during their individual visits.

If individual or group appointments have not been made in advance, you will want to leave time in your Day 1 agenda for groups to determine who will lead their legislative visit discussions and take time to set-up their appointments. Consider the following questions when preparing for meeting with your state legislators.

- Who will be the lead?
- Who will add specific information or examples from their local level?
- What information and documents will you bring?
- What will be your key topics of conversation?
- What will you leave with the state legislators you meet?

Day 2



For our first year, we designated the cafeteria at the state capitol as our meeting space. Participants engaged in their own appointments with their state legislators at the state capitol. As we have continued to provide the State Special Education Legislative Summit, we have changed our structure each year to allow more flexibility, adapt to unforeseen circumstances, facilitate better communication among participants, or respond to potential weather threats.

During visits, participants share with their state legislators views, experiences, student successes, and struggles. Setting meetings in advance is highly recommended to strengthen your ability to meet with your state legislator; however, appointments can be set closer to the date of the event and even day-of the event.

However, chances become slimmer of actually meeting with state legislators the closer you get to the State Special Education Legislative Summit date. Use this precious time to discuss issues and concerns individually or with groups who make important decisions for the field of special education.

Grouping into Teams

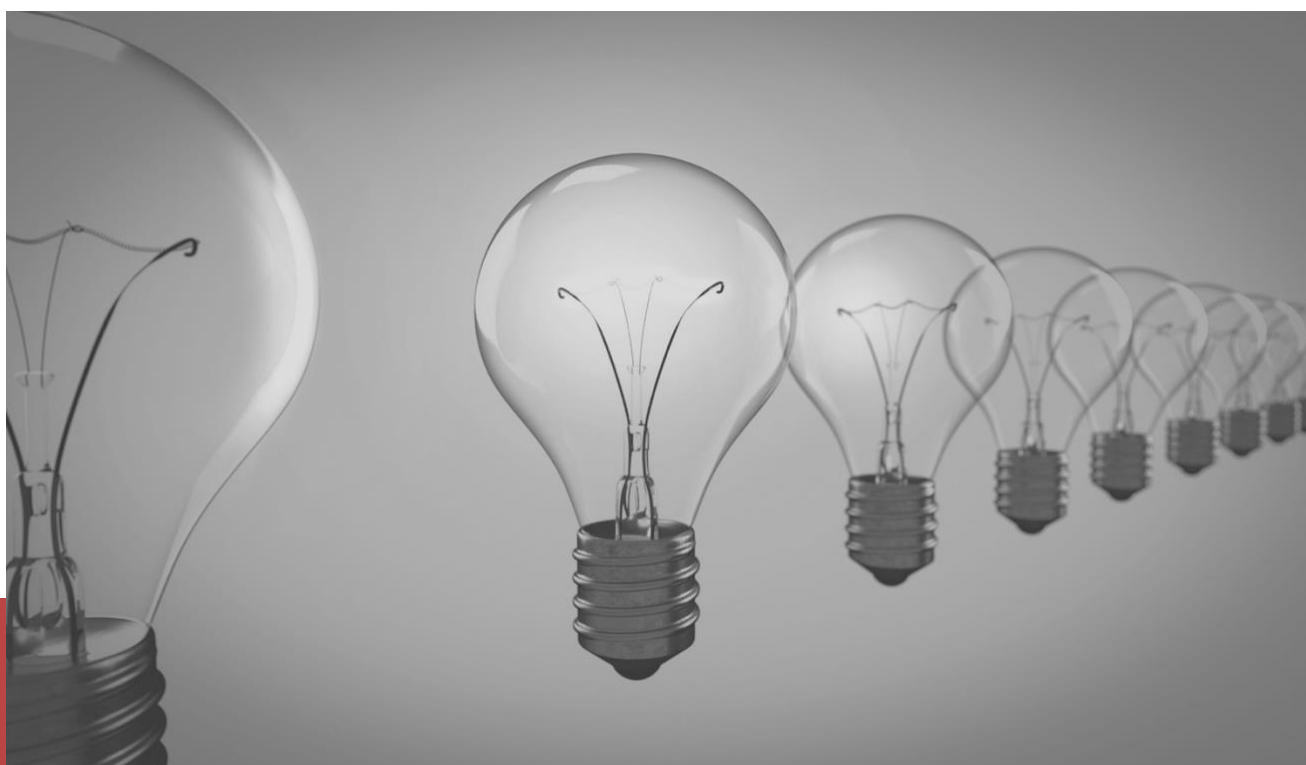
It is beneficial to group the participants of the State Special Education Legislative Summit into teams based on their [Senate districts](#). In Oklahoma, we chose Senate districts over House districts because they encompass more area and would make grouping easier. Being strategic and grouping into teams this way allows for participants to plan their visits together, form a collective unit, and ensure consistency and lack of redundancy.

Another benefit to grouping by Senate district is the proximity the group would have to each other, which allows them to look at legislation that impacts their area of the state. In addition, proximity to one another may allow the team to continue advocating at the local level as a cohesive group.



Team Meetings

During the State Special Education Legislative Summit, present as much information about current legislation as possible, while not overdoing it or “watering down” the information. This will assist in informing participants, while not confusing them. Guide teams to spend team time focusing on their talking points for legislation they feel passionate about or that directly impacts the field of special education, the students with disabilities they serve, or their local areas. The [Council for Exceptional Children’s Legislative Action Center](#) has developed team planning tools to assist teams in preparing for visits. Example tools can be found in Appendix D.



Alternate Structures

...the structure we implemented was modeled after several national-level legislative summits who implement “A Day on the Hill” format; however, there are other ways to effectively meet with, communicate with, and engage state legislators on a personal level. We have included a few examples below for consideration.

- Reserve one main room at your state capitol for Day 2 of the State Special Education Legislative Summit. Invite all your state legislators to visit you and participants in the room. Ask your state legislators to come prepared to speak on specific topics or be prepared to answer questions on such topics. Or, schedule specific times for each state legislator to drop in, have designated participants take turns greeting the state legislators in small groups and talk with them about specific topics. Be sure to have the state legislators leave with concise information in hand as well as business cards. State Special Education Legislative Summit participants should obtain business cards from the state legislators to follow-up later.
 - Accelerated Advocacy: Another version of this option would be to have round tables set up in the room, with participants designated to sit at specific tables to talk about specific bills with state legislators as they come to the room. Over the course of the meeting time, state legislators can change tables.
- Reserve multiple rooms at your state capitol and designate each room to focus on specific topics of discussion or have participants in each room who are well versed on all topics. You can have specific appointments made with state legislators to be held in those rooms. In addition, you can structure those rooms to follow one or more of the following formats:
 - Think Tanks: Generate ideas and provide advice on legal issues regarding special education and the transition of students and youth with disabilities.
 - Brain Dumps: Participants and state legislators take what they know on specific topics and get those thoughts on paper. These thoughts on paper can develop into a pros and cons list on flip charts for specific bills.

- Policy Briefs/Institutes: Leaders from your group help engage in data analysis, discussion of current research, and the exchange of information and knowledge to help inform participants and state legislators.
- Expert Panels: Two varieties of expert panels exist: (a) participants serve as the experts, informing, educating, and advocating while state legislators serve as the target audience or (b) state legislators serve as the experts, informing and educating participants on status of bills, their position, and reasoning behind their position, allowing time for participant questions. This may also resemble a Town Hall.
- Center of Thought: Arrange the room as a large rectangle or U shape to allow for a personal interactive discussion amongst participants and state legislators. Topics, bills, or even conversation starters could be prepared in advance to help facilitate the discussion.

Formatting Day 2 of the State Special Education Legislative Summit is up to your group based on what will best meet your needs but also based on how well prepared you are in advance (e.g., if there is enough time to set specific appointments with state legislators, how many participants plan to attend Day 2). You may even find your event may look different from year to year, which is fine, as long as it meets your needs and achieves your purpose.

Steps for Meeting with Your State Legislators

1. Identify your state legislators.
2. Call your state legislators' office and ask to speak with the legislative assistant. Generally, this request is most effective if done at least one month in advance. Most offices require you send a "meeting request" via email to the legislative assistant.
3. When drafting your email, put "Meeting Request" and a specific date in the subject field of your email. In the body of your email, include the following information:
 - a. While the exact date of your visit may be set, the more meeting times you provide for that day, the more likely you will get a meeting with your state legislator. Be flexible with your schedule.
 - b. Let the legislative assistant know exactly how many people will attend your meeting and provide their names and hometown.
 - c. Provide a brief synopsis of the issues you would like to discuss with your state legislator. Limit this list to three topics.
4. If you do not hear back within a couple of days, resubmit your request and state you are "just checking in regarding your meeting request for date and time."



Tips for Meeting with State Legislators

Meeting Length with State Legislators

Keep meetings 15-20 minutes in length. It is important to be clear, concise, and focused on the topic. Planning time with your team prior to meeting your state legislator is paramount for presenting yourselves as an organized and prepared group. Identifying a team leader may be helpful to keep the group on track and to make sure you present your message completely when visiting your state legislator.

Introductions

First impressions are everything. Upon entering the office of your state legislator, you may encounter a receptionist, scheduler, staffer, or even the state legislator. Be sure to introduce yourself by stating your professional role (e.g., I am a special education teacher)—not who you are employed by—the town/county/ward in which you live, and an overview of the children with whom you work. It is important for the state legislators to be able to make a connection to you and/or your group. In advance of your meeting, do your research and see if you or your fellow team members have any common friends, schools, jobs, churches, or other connections with your state legislator. Mentioning those connections at introduction will help the state legislator feel a more personal connection with you and, hopefully, better remember you after the meeting. As the meeting concludes, be sure to give them your personal contact information, and thank them for dedicating time to talk with you and your team.



Key Legislative Issues

Prior to actually having a meeting with the state legislator, you will have chosen the specific topics you will discuss during Day 1 of the State Special Education Legislative Summit. In addition, you will also have chosen who will speak on behalf of the group. It is best to have one designated speaker with a few others who can provide support through personal examples, stories, or data. Knowing your team will only have a short amount of time (i.e., 15-20 minutes in length), choose two or three issues to discuss. Have all your materials prepared in advance. Operate on the KISS principle (Keep It Simple, Sam), as you will not be able to cover all issues in depth. Prepare one-page fact sheets, one-page charts, graphs, and bulleted points. Provide state legislators with concrete data to support your issues. Most importantly, have real student, school, and community examples to share with them. Always leave them with the information in a nice folder along with your business card (if appropriate) or personal contact information.

If the state legislator or other representatives ask you to follow up with them on a specific item or question, be sure to do that in a timely manner. As you begin building a relationship with your state legislator, you may become their go-to person for all things related to that issue.

Conclusion

Upon ending the meeting, thank them for their time and ensure you will follow up with them. Ask what the best way would be to follow up—by email or phone. Also, remember to thank the receptionist/scheduler for assisting in making the appointment.

Tips for Visiting Your State Capitol

Visiting your state capitol may prove more challenging than you think. It is imperative that you do your homework to identify the available parking, entrance, and locations of the offices of your state legislators. Be aware of security, visitor entrances, construction, and other events or groups onsite that day. Taking a visit in advance to your state capitol will help acclimate you to the area and assist you in providing clear instructions to participants. Also, find pictures of your state legislators and become familiar with those with whom you will be meeting. Below, please find a few strategies to use when visiting your state capitol.

- Wear comfortable shoes or pack a pair of comfortable shoes to change into throughout the day. You may be doing a lot of walking.
- Be prepared to go through metal detectors and security lines, so know what is not allowed in your state capitol.
- The schedule of your state legislators can change quickly without any notice. Be prepared as you may have to wait.
- Be flexible. State legislators are in and out of meetings all day and may have something pop up unexpectedly during your visit. Make arrangements to circle back around with them later in the day or even schedule a follow-up date to come back.
- Keep the contact information for the offices you are visiting with you. Should you be delayed, call the office and let them know.
- Limit the size of the group that will go into each visit. A group of three to five people is best. Also, you will have already identified who will be the lead speaker for your group, who will provide data, and who will provide anecdotal stories of relevance. Feel free to rotate for each of your meetings or keep the same individuals, depending on your group members, their knowledge, and their comfort level of speaking in groups.
- Be prepared to give your business card to the legislative assistant at the front desk and the person with whom you are meeting. If your meeting gets canceled, be sure to leave your card with the person at the front desk of that office. You may also want to leave a folder with information, so your state legislators have it readily available when you follow-up with them.

Remember

- Visit before asking for a favor.
- Do not attack their ideas. Listen for information.
- Thank your state legislators and their staff.
- Follow- up by email or by personal card after the visit to thank them for their time.
- If they asked you for information or you said you would send them something, be sure to follow through with the task.
- Be a resource and stay connected.

SECTION 3

Follow-Up After the State Special Education Legislative Summit

Follow-Up and Report-Outs

Given all the participants are only together as a group on the first day and making their group visits the second day, there is not an opportunity to debrief as a large group. To assist with hearing from participants about their legislative visits, teams can designate a lead who is responsible for following up with your planning committee to provide information. You could also send survey questions to all participants separate from an event evaluation to capture feedback on their legislative visits. Virtual meetings could also be held to gather feedback. Here are some questions for consideration.

- What questions did state legislators have for your group that give insight into their areas of need or areas in which they intend to focus?
- What questions did state legislators have that your group was unable to answer?
 - What is your plan for following up with the state legislator(s) to communicate the answer?
 - Do you need assistance from an OK-DCDT State Subdivision board member to help answer their questions?
- Were there any specific requests for information of your group from the state legislators?
 - If yes, what were those requests?
 - Do you need help fulfilling the requests?
 - Have you already responded to the request?
- Were any state legislators especially supportive of a bill that would benefit us in reaching out to collaborate?
 - If yes, who is the state legislator, and what did he or she say that would be important for us to know?
- Were any state legislators especially unsupportive of a bill that would benefit us in reaching out to educate further on the topic?
 - If yes, who is the state legislator, what was the bill, and what did he or she say that would be important for us to know?
- Did anything stand out during your legislative visits you would like to share?



This information may be compiled to help your larger team effectively advocate for students with disabilities in your state. Your team may decide there is other information you want to capture from the visits and may develop other methods of acquiring that information.

Following the State Special Education Legislative Summit, use an online survey platform to create an anonymous survey to obtain participant feedback about the event and their experiences meeting with their state legislators. This information can help you develop a stronger event in the future and provide participants an option to request additional information or technical assistance. Please see Appendix E for a post-evaluation example.

State Special Education Legislative Summit Meetings: Check-and-Connect Opportunities

... to capitalize on state legislators being in their home communities in the summer, consider getting participants together to have local meetings. You can start by meeting as a group to talk about overarching topics that are always relevant to the field of special education, such as the priorities recommended by the Council for Exceptional Children. In 2017, these were two of the Council for Exceptional Children's top priorities.

- Invest in education because schools cannot absorb additional funding cuts and continue to meet the needs of all students.
- IDEA must be fully funded to the 40% that has been stated in law since 1975; yet, we are still at only 16%. Students with disabilities need and deserve to receive all services available to them to achieve positive post-school outcomes.

By using these broad categories, you can begin a conversation and lead into more concrete and specific topics relevant to the success of students with disabilities, including policies and laws impacting your schools, districts, and state. Below, please find ideas for engaging with your state legislators during the summer.

- Invite state legislators to come for coffee.
- Visit state legislators in their local offices.
- Invite state legislators to be guest speakers for your organization and committee meetings.
- Arrange a breakfast or lunch to have a few partners join you in a conversation with your state legislators.
- Invite state legislators to volunteer at a community event with you to expose them to various programs and services available in your community for students with disabilities.

For more information about the Council for Exceptional Children's current legislative issues or priorities and to submit letters to your state legislators, please visit [here](#).

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Appendix A

Oklahoma Save The Date Example



Appendix B

Oklahoma Registration Example

State Special Education Legislative Summit
February 7-8, 2017

Oklahoma educators need to band together to make a difference in education policy. Picketing outside the state capitol is not working. We need to have meaningful conversations directly with our state legislators BEFORE votes are cast on bills involving education. This 2-day state special education legislative summit is for teachers, parents, administrators, teacher educators, teachers in training—anyone who passionately supports Oklahoma special education issues that impact education, students with disabilities, and the professionals who work on their behalf.

On Day 1, you will receive the knowledge and training you need to be an effective special education advocate, including

- detailed issue briefings explaining the critical issues facing the field of special education,
- insider perspectives from experts in education policy organizations, and
- coaching and practice sessions on delivering effective advocacy messages.

On Day 2, you will have the opportunity to be heard by state legislators:

- share your views and your students' successes and struggles with members of Oklahoma legislature at the state capitol and
- meetings will be pre-set; we will discuss issues and concerns in groups directly with those who make important decisions for our field.

This 1st Annual State Special Education Legislative Summit will allow those who are directly impacted by educational legislative decisions to express concerns and needs, which could influence our state legislators to make changes in current legislation.

February 7th and 8th

February 7th will be held at MetroTech Springlake Campus (near the state

capitol) and February 8th will be held at the state capitol.

Day 1 Tentative Agenda

8:30-9:00 a.m.: Registration

9:00-9:15 a.m.: Welcome

9:15-11:30 a.m.: Getting Your Legislative Groove On: Learning to Advocate with Legislators

11:30 a.m.-1:00 p.m.: Lunch Provided

1:00-3:00 p.m.: Small Group Breakouts to Discuss Current Bills

Day 2 Tentative Agenda

Meetings will be held at the state capitol in the offices of our state legislators.

Due to limited space, registration is limited to the first 100 participants.

Registration will close end-of-day on February 1, 2017.

- First Name
- Last Name
- Email address
- Cell phone or best contact number
- Zip code
- Role (choose all that apply)
 - K-12 Special education teacher
 - K-12 Administrator
 - K-12 General education teacher
 - Higher Education faculty or staff
 - Graduate student
 - Parent of a student with a disability
 - Rehabilitation services provider
 - Other community agency service provider
 - Other state agency representative
 - Member of OK-DCDT/OK-CEC
 - Member of Student OK-CEC
 - Presenter
 - Other (please specify)
- Employed by (if you are a parent enter N/A)
- School District

- If you know your voting district, please indicate the numbers.
 - House district (HD) number
 - Senate district (SD) number
- Learning accommodations needed (e.g., large print, CART, ASL interpreters, or materials sent electronically)
- Dietary needs/preferences (e.g., gluten-free, vegetarian, vegan)
- I give my permission to use my photo or likeness for video promotional purposes.
 - Yes
 - No
- How would you like to pay the registration fee?
 - P.O.
 - Check (made payable to...)

Appendix C

Oklahoma Key Search Terms

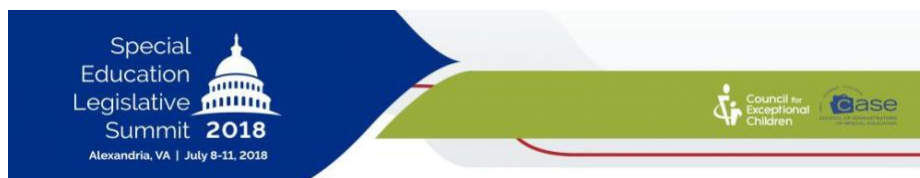
To begin collecting relevant bills to discuss at the *State Special Education Legislative Summit*, it is important to identify key search terms. The Oklahoma legislative site does have a search feature; however, that feature is not very reliable due to the way keywords are assigned to bills. Therefore, it was necessary to read the short titles of all bills to target keywords further identifying bills to explore in detail. To select legislation, we analyzed the titles of all bills for relevant topics. The topics included, but were not limited to, the list below.

Accommodations	Careers	Rehabilitation
Assessment	Disability(ies)	Transition (Secondary Transition)
Assistive Technology	Education	Vocational Education
Career Readiness	Employment	Waivers

However, due to the wide range of keywords possible, it was prudent for us to expand our scope to anything that hinted the bill may be relevant, allowing us to read further. One issue we encountered in our first year was the incredibly high volume of bills pertaining to education due to the impending teacher walk-outs. For this session, we separated bills with the phrase or keyword “Teacher Pay Raise,” “Teacher Salary,” or similar phrases into a separate list. We did not continue to do this for the latter two years due to it being an isolated focus for that year in our legislature.

Appendix D

Team Planning Tools



Creating a Passionate and **DATA DRIVEN** Story (elevator speech) to Support CEC's Legislative Recommendations

Objective

Successful and compelling stories use data to articulate a proven/expected outcome for children and youth with exceptionalities and the professionals who work on their behalf. Begin with the impact special education and early intervention has on children and youth with exceptionalities and how your professional role within the system influences the positive outcome.

Elevator speeches are brief opportunities – may be one-to-two minutes – to pique the interest of anyone whose ear you'd like to bend about policy.

TOP TEN TIPS!

TOP TEN TIPS!	
1. A "hook"	Open your pitch by getting the members attention with a statement or a quote.
2. Passion	Passion often inspires action. Deliver with energy and dedication – to stir an emotional reaction and cause your Member of Congress to care.
3. CEC Legislative Recommendation	Start with sharing one of CEC's legislative recommendations.
4. Data Matters	Offer "good" and "bad" data from data sheets you have prepared. Knowing your facts helps establish you and your association as a credible resource and a "go to" person for the future.
5. Personal	Share your connection and how you have worked to develop solutions to the policy issue. Connect on a personal level. Describe how to create solutions together.
6. Relevant and Accessible	Tailor a jargon free story to deliver to your Member of Congress. Why issue is important to State and District and the Members constituents. Steer away from extreme examples. <u>Advocacy with real life experiences is your most persuasive tool.</u>
7. Necessary Resolution	Point out the perils of the current circumstance followed by the benefits to your Member of Congress and their constituents.
8. Connection to Policy	What are the broader implications of your story? Articulate how federal policy can make a difference.
9. CEC Legislative Recommendation	End your story by circling back to repeat CEC's legislative recommendation on the issue and asking your Member of Congress their position the issue.
10. Commitment from Member	Ask your Member for a commitment regarding how they will help. Ask them what they are currently doing on the issue. Be a good listener. Provide one last example of how they can be a "hero" and how their constituents will care and appreciate their work. Thank your Member of Congress. Leave the door open for the future.

Developing and **PRACTICING** Your Story

Let's Practice

Okay, it is your turn now to develop and practice your story. Prior to coming to Washington, D.C. prepare four short stories to share with your state teams during Monday's meeting to prepare for your Hill visits.

Use the four Issue Briefs along with relevant data from your data sheet.

Issue Brief: Education Appropriations

Issue Brief: Keep Public Funds in Public Education

Issue Brief: Special Education Teacher and Early Intervention Provider Shortages

Issue Brief: Social and Emotional Learning, Positive Climate, and Mental Health Supports

PRACTICE!

PRACTICE!

PRACTICE!



Let's Practice

Objective

This activity is designed for advocates to practice delivering CEC's legislative recommendations to their members of Congress.

Partner Roles

Member of Congress: _____

CEC Advocate: _____

What will you say?

Ready to talk to your member of Congress? Let's start with the person sitting next to you. Choose your roles. Practice your stories, which include introducing yourself, getting to know your member of Congress, using the data from your state/district sample data sheet, delivering the CEC legislative recommendations and telling your story. Choose any of the four issues for your role play. Plan your conversations below, and then practice them in a role play situation. What is working? How can it be improved? What is not working? Can you align data? Example: PBIS has decreased disciplinary referrals in Smith School District, but not all schools are able to afford the program due to insufficient funding. CEC urges Congress to increase appropriations for IDEA Part B in the FY 2019 budget. Be prepared to share your best story with your colleagues. Please give your partner feedback about their presentation.

Your story. Your program. Your children. Your voice matters.

Appendix E

Oklahoma Post-Evaluation Example

State Special Education Legislative Summit Event Evaluation Fields

- Which day(s) did you attend the 1st Annual Oklahoma Special Education Legislative Summit?
 - Day 1 on Feb. 7th
 - Day 2 on Feb. 8th
- Please indicate your professional role (check all that apply):
 - K-12 Special education teacher
 - K-12 Administrator
 - K-12 General education teacher
 - Higher Education faculty or staff Graduate student
 - Parent of a student with a disability
 - Rehabilitation services provider
 - Other community agency service provider
 - Other state agency representative
 - Member of OK-DCDT/OK-CEC
 - Member of Student OK-CEC
 - Presenter
 - Other (please specify)
- Please indicate your level of work (check all that apply):
 - K-12
 - Career Tech
 - Higher Education
 - Other (please specify)
- On a scale of 1-5, with 1 being low and 5 being high, please mark the rating that best describes your opinion of the following (comments welcome in the boxes):
 - Welcome: JJ Dossett
 - Learning to Advocate with Legislators: Wanda Felty
 - Learning to Advocate with Legislators: Dr. Erin Taylor
 - Presentation of Bills: Josh Fearing
 - Small Group Breakout Session
 - Your overall knowledge of the topics covered in the Summit prior to participating
 - Your overall knowledge of the topics covered in the Summit at the conclusion

- Overall rating of the Summit
- The amount of time allocated for Small Groups was:
 - ☐ Just right
 - ☐ Adequate
 - ☐ Not Enough
 - ☐ Comments
- What motivated you to attend the Summit this year?
- What parts of the Summit were most helpful to you?
- How could this Summit have been more helpful?
- How do you plan to use the information you've obtained in your work?
- Was the space clean and comfortable?
 - ☐ Exceeds expectations
 - ☐ Adequate
 - ☐ Needs improvement
 - ☐ Comments
- With which legislators did you meet?
- Briefly describe outcomes or highlights of the meeting(s).
- Additional comments

To ensure participants are comfortable expressing their opinions, you may consider keeping the evaluation anonymous by adding a link in the closing message of the survey where participants can download the certificate of attendance. You can also add a contact link here if participants want to reach out for questions or additional information.