Research to Policy Boot Camp: A Communications Toolkit for Researchers

PRESENTED BY THE URBAN INSTITUTE FOR POLICIES FOR ACTION

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COMMUNICATIONS WORKBOOK

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BUILDING AN AUDIENCE LIST

Building an audience list includes thinking through already established contacts and stakeholders. By considering recently attended conferences, email newsletters, project stakeholders, focus groups for a project, advocates who reached out, or practitioners you worked with, you are able to build an engaged audience. Even if you don't have names, it is important to think through organizations or the positions for people you think could be interested. You will eventually need to track down names and contact info, but to start, just brainstorm.

- ☐ **Academic & Research Organizations**
  - ☐ Researchers at think tanks (e.g., Urban Institute, Pew Research Center, RAND, Brookings Institution)
  - ☐ Staff or members of research associations (e.g., National Association for Welfare Research & Statistics)
  - ☐ Scholars and academics
  - ☐ Data Organizations (e.g., NORC, Census Bureau)

- ☐ **Nonprofit Organizations**
  - ☐ Membership organizations (e.g., Economic Analysis and Research Network (EARN), Chamber of Commerce, American Medical Association)
  - ☐ Advocacy groups (e.g., National Low-Income Housing Coalition, National Women's Law Center, AARP)
  - ☐ Civil Rights Organizations (e.g., UnidosUS, Human Rights Campaign, Leadership Conferenceon Civil and Human Rights)
  - ☐ Community Stakeholders (e.g., local organizations named in your project)
  - ☐ Service Providers (e.g., United Way, Community Health Centers, Food Banks)
  - ☐ Community Activists, Grassroots Organizations and Advocates for populations (e.g., Moms Rising, National Fair Housing Alliance, National Head Start Alliance, Children's Defense Fund)
  - ☐ Charities and philanthropy (e.g., Catholic Charities, Salvation Army, Red Cross)

- ☐ **Federal Government and the Administration**
  - ☐ Appointees, policymakers, or grant-makers at Cabinet-Level Departments (e.g., Housing Urban Development, Health and Human Services, Department of Education, Department of Labor, Department of Justice)
  - ☐ Appointees or policymakers at independent agencies (e.g., Interagency Council on Homelessness, Consumer Financial Protection Bureau, Federal Housing Finance Agency)
  - ☐ White House staffers or appointees (e.g., Council of Economic Advisors, Office of Management and Budget, Domestic Policy Council, Vice President's office)
  - ☐ White House Initiatives or Cabinet-level Initiatives (e.g., White House Initiative on Educational Excellence for Hispanics, White House Task Force on Puerto Rico, Including the Office of Engagement, Offices of Intergovernmental Affairs, Office of Civil Rights).

- ☐ **Funders**
  - ☐ Program officers of funding organizations for this project and past projects (e.g., Anne E. Casey Foundation, Ford Foundation, Kellogg Foundation)
  - ☐ Philanthropic community organizations (e.g., East Bay Community Foundation)

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- ☐ **U.S. Congress**
  - ☐ Staffers who work in Senator's or Representative's offices
  - ☐ Staffers who work for a Congressional Committee (e.g., Joint Committee on Taxation; Senate Committee on Health, Education, Labor and Pensions; House Ways and Means Committee)
  - ☐ Staffers who work for Congressional Caucuses (e.g., LGBT Equality Caucus, Congressional Asian Pacific American Caucus (CAPAC), House Hunger Caucus)
  - ☐ Researchers at the Library of Congress, Congressional Budget Office, or Government Accountability Office

- ☐ **State and Local Elected and Program Officials**
  - ☐ Associations of elected officials or civil servants (e.g., National Governors Association, National League of Cities)
  - ☐ Elected officials (e.g., Mayors, Governors, County Supervisors)
  - ☐ Staff to elected officials (e.g., Mayor's Chief of staff, City Manager, or County Administrator)
  - ☐ Program directors or practitioners (e.g., program officers at a public housing authority a county welfare director)

- ☐ **Private Sector**
  - ☐ Consultants and consulting firms (e.g., Accenture, BCG, Deloitte)
  - ☐ Businesses and startups (e.g., Lyft, AirBNB)

- ☐ **Your Personal Audience**
  - ☐ Colleagues in your department or division
  - ☐ Colleagues in other departments, divisions, organizations, or universities
  - ☐ Trustees or board of directors
  - ☐ Social media networks (e.g., Twitter, LinkedIn, Facebook)
  - ☐ Friends or other personal relationships

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SOCIAL MEDIA FOR RESEARCHERS

Not all social networks are created equal. Depending on your goals, some will offer much more value than others. But for professional purposes, **Twitter** and **LinkedIn** are your best options.

Twitter Guidelines

- Don't stress! It's 280 characters, max. Try to keep your tweets as brief as you can.
- At minimum, make sure your profile has an image and brief bio. (Bonus points for a cover photo and link—to an author page, an urban.org bio, etc.)
- Tweet at least 2-3 times per day—or, if you're comfortable with it, up to once every hour or so during the workday.
    - Space out your tweets. If time is an issue, try a scheduling tool like HootSuite, Buffer, or TweetDeck.
- General rule of content: 20% all about you/your work, 80% other interesting stuff (links to news stories or colleagues' work, RTs, replies, etc.).
- Don't get too caught up in saving space with abbreviations and slang. When composing a tweet, read it out loud—does it make sense? (It should.) If you have a lot to say, send more than one tweet, and thread them together by replying to the tweet before. (Or think about writing a blog post.)
- Incorporate @ mentions. For instance, if you're tweeting about a Vox.com story, try including @voxdotcom or the reporter's Twitter handle.
    - **Example:** Here's an interesting story from @ezraklein at @voxdotcom about X [link]
- You can start a conversation with anyone—just include his or her Twitter handle.
    - **Example:** @ezraklein Really loved your story about X
        - The above tweet would only show up in the streams of users who follow both you and @ezraklein. If you want to ensure that everyone can see your tweet, place a period in front of @ezraklein. (This is only necessary for tweets that begin with @.)
            - **Example:** .@ezraklein Really loved your story about X
- Be on the lookout for @ mentions of your own Twitter handle—in your Twitter settings, you can opt to have an email sent to you when you're mentioned. You can also check your mentions though the "Notifications" tab on the website or on your phone app. An app can also send you push notifications.
- Participate in broader conversations and make your tweets more "findable" by adding an occasional hashtag.
    - **Example:** Tweets related to Urban events are usually tagged with #LiveAtUrban.
- When applicable, add photos, multimedia, and links.
- Don't be all work, all the time—talk about your other interests (if you're comfortable) and add a bit about your outside-of-the-office persona to your Twitter bio.

Twitter Glossary

- Hashtag (#): Like applying a searchable label to your tweet. Can help you catalog your own tweets, or ensure they're a part of a larger conversation. To see one in action, click on any hashtagged word; it'll set off a search for all tweets that include it.
- @ reply: A reply to someone's tweet—click on the tweet, select "Reply," and add your response.
- Mention: Any mention of a Twitter handle (@username) in a tweet.
- Like: Acknowledging a tweet without sharing it with your own network.
- Retweet (RT). Basically just echoing someone else's tweet. Hover over the tweet and select

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"Retweet," which will copy it verbatim (and give credit to the original tweeter).
    - You also have the option of retweeting and adding an additional comment. This is a great opportunity to add your own perspective, a link to your work, etc.
- Thread: A stream of connected tweets, identified with a blue line running down the left. (You'll know it when you see it!)

Live Tweeting

You may attend events where you're encouraged to live tweet. Want to participate? Here's what you need to know:

- Do some hashtag research—most likely, there's an official hashtag already. If not, see what the hosts or speakers are using to talk about the event. (Worst-case scenario: select a subject-related hashtag or create your own.)
- Mention the speakers' Twitter handles if applicable.
- Serve as a curator of the event's most interesting quotes, stories, and images. Add your own thoughts and analysis. Try to tweet every few minutes, and always include the hashtag.
- Incorporate links and multimedia when relevant—think photos, videos, and other related research.
- Keep an eye on the #event Twitter stream, as well as your own @ replies. Make sure you're engaging with others when appropriate.

LinkedIn Guidelines

- Though you should invest some time in creating your profile, LinkedIn is a relatively low-maintenance social media network.
- Update your profile when you experience a career change, publish something, etc.
- Respond to connection requests—the LinkedIn equivalent of "friending" someone.
- Join professional groups and organizations, and participate in relevant discussion boards.
- Post status updates—links to news stories, updates on your professional life, things you or a colleague are quoted in, etc.—and like and comment on others' posts.
- Ask for "recommendations" (references) from trusted colleagues.
- Endorse colleagues for skills you're familiar with—they'll likely do the same for you.
- Follow companies and high-profile individuals you'd like to learn more about.
- Consider posting career-related essays on LinkedIn's publishing network.

BLOG WRITING FOR RESEARCHERS

Urban's various digital communications channels and products—Urban Wire, newsletters, features, etc.—provide a visible, consistent, and relevant online presence for the organization and its experts. These channels enable us to respond quickly to the news of the day, and provide content that is relevant and accessible to all interested parties, from fellow researchers, to the media, to amateur wonks, and to general consumers.

How to create better content

Studies have shown that online visitors rarely read anything from start to finish. Instead, they skim, visually jumping around to find the content they are looking for. Use these evidence-based best practices whenever you're working on a digital product, be it a blog post, feature, or email newsletter.

- **The first three words of a paragraph have to be substantive and engaging**. By the fourth word, users have decided if they are going to read the rest of the paragraph or not.
- **Paragraphs longer than four lines won't be read**. You don't necessarily have to write shorter copy, but you have to add more hard returns at the end of each unique idea to create more scannable text that doesn't appear overwhelming to the user. White space is scientifically proven to prevent readers from getting overwhelmed.
- **Readers generally won't read past 600 words**, so keep your text short and to the point. *Urban Wire* blog posts generally range from 300 to 800 words.
- **Online readers love bullets**—or at least the first three words after a bullet. A series of ideas should be in bullets, not strung together into long paragraphs.
- **Anticipate scanning**. Bolded text (headlines and subheads) is read, and plain text (body copy) is scanned. People read above the fold, and scan below the fold.
- **Keep it relatively simple**. Only the most ardent readers are excited to "explore" content: mousing over content, actively looking for what pops up, and clicking on items without a strong call to action.
- **Make sure links tell a story**. Some readers scan the page from link to link, because the links are often the biggest, boldest text.
- **Reiterate the most important points at the bottom of the page**, in a closing paragraph below a subhead. Scanners only stop scrolling when they hit the bottom of a page, so the last paragraph/link gets a disproportionate share of reads and clicks.
- **People make "eye contact" with photos** (particularly faces), and the content under photos get a disproportionate amount of views and clicks, too.

Seven blogging tips

1. Remember that writing for the web is different. One reason people read differently on the web is simple: it's harder to read on a computer or phone screen than on a page. Studies show our eyes scan stories on screens and look for the most important pieces of information.

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Online readers are busy and want information as quickly and efficiently as possible. That doesn't mean you have to dumb down what you want to say—it just means you need to strip away everything else. Subheads and bullets will help readers catch your main points and draw them into the full text.

2. Be direct and keep things short. When writing for the web, it's important to keep things as short and direct as possible. You can never be too straightforward. Don't hide your main point at the end of a long introduction or wait to break it out as a conclusion. And use links as a shortcut when you can. Keep your sentences short and simple and remember to use active verbs.

3. Think about how people will share your story. New blogs only get audiences if people share posts with their networks. If your piece was in a magazine, people would share it by handing the entire magazine to a friend. Online, however, people share posts by copying and pasting a single sentence with a link on Facebook or Twitter.

Strong, impactful quotes are especially effective on social media. (However, you must be careful not to say things that could be taken out of context.) Read through your post and try to imagine what sentences people might use as a tweet. Make these as strong and self-sufficient as possible. You can even bold them to make them stand out.

4. Be upfront about complex issues. If parts of your blog post require more context and explanation, be very straightforward about it. Start off with a disclaimer such as, "This is a complex issue with many different factors." If people are interested in learning the nuances of the issue, they will read it. If they're not, let them know what they're in for right away. And when possible, use links to provide more background information.

5. Headlines are everything. Headlines should be clear and let the reader know exactly what they're getting. A headline may be clever and wonderful, but if it's too ambiguous, nobody will click on it (or be able to find it). You need to give them a reason to click.

As an example, the headline "Much Ado about Nothing" was taken from a report about technology stock prices. Not only would someone interested in stock prices never click that link, but if they were Googling articles about tech stock, they would never find it.

Remember the social factor here too: many people will share and find your stories through social networks that may only include the title of the article. To grab social readers, the title should be intriguing and declarative at the same time.

6. Engage your readers. Consider asking a question at the end to invite more comments. Are there links you could include that would add to the post? A poll or some other piece of interactive content? These are all great ways to engage readers.

7. Find your voice. One of the Urban Institute's great strengths is the intellectual freedom it allows for its researchers. Scholars are encouraged to share their opinions as long as they are rooted in data and facts (just be sure to link to those sources when possible). Your post does not represent the totality of the organization—that's the job of our primary site. Your post represents your evidence-based point of view, informed by your work for Urban, and we want your personal voice to shine though. Don't shy away from using first person and including (short) anecdotes that enhance your arguments.

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YOUR CHECKLIST TO INTERVIEW SUCCESS

Key takeaways

- ☐ What are the two or three most interesting or important findings from your research?
- ☐ Why are they significant?
- ☐ What surprised you?
- ☐ Are there a few statistics that are particularly noteworthy?
- ☐ What are the policy implications of your research and findings?

Interview tips

- ☐ Be confident
- ☐ Take your time
- ☐ Speak in lay terms
- ☐ Be concise
- ☐ Listen carefully
- ☐ Don't be afraid to ask for clarification
- ☐ Don't feel obligated to answer every question or every part of a question

Getting quoted

- ☐ Tell a story
- ☐ Use imagery
- ☐ Spotlight a standout number
- ☐ Bust myths and misperceptions

Problem questions

- ☐ "While I'm not an expert on that subject, I can tell you…"
- ☐ "It's too early to tell, but it seems clear…"
- ☐ "What's important to remember is…"

Keeping it crisp and concise

- ☐ "The bottom line is that…"
- ☐ "The three most important reasons…"
- ☐ "To summarize…"

Putting it together

- ☐ Be responsive when a media request arrives (even if it's a referral to another source)
- ☐ Think through your key takeaways
- ☐ Make the information accessible
- ☐ You're the expert, you can drive the conversation
- ☐ Say something that stands out
- ☐ Practice, practice, practice

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POLICY IMPACT PLAN TEMPLATE

Plan for	
Goal	

Identify your key audiences. Who might benefit from learning about your research?

Audience A ______________________________

Audience B ______________________________

Audience C ______________________________

What do you want them to do? What actions might they take after learning about your research?

____

____

Plan your time. What's the timing for your outreach? Are there key events to keep in mind? Are you working toward a specific deadline?

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Deliverable 1												
Deliverable 2												

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List your channels and tactics. How can you reach your audiences?

Audience A			
Audience B			
Audience C			

Write your key messages. What is your headline message that will make your audience sit up and take notice? What's new, different, surprising, or challenges expectations?

Prepare your messengers. Are there validators, thought leaders, influencers, etc. who can help you carry your message? Are there materials that you need to create to help share your message?

- ☐ Fact sheet
- ☐ Media pitch
- ☐ Tweet
- ☐ Written testimony
- ☐ Elevator pitch
- ☐ LinkedIn post/blog
- ☐ Policy brief
- ☐ Blog post
- ☐ Facebook message
- ☐ Other:

Evaluate. How will you know whether your plan was successful? How will you measure outputs and outcomes?

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DATA VISUALIZATION BEST PRACTICES

Chart types

Bar charts: Usually the best way to compare multiple values across categories. *Stacked* bar charts can be used when the sum of values across multiple categories is meaningful, while *grouped* bar charts are better for comparing between categories.

Pie charts: In general, users can more easily compare multiple values within or across bar chart(s) vs pie chart(s). However, pie charts can be very effective when data represent a part-to-whole relationship *and* you have two (or at most three) categories of interest.

Scatter plots: A way to show two variables that correlate to each other. Even if not explicitly stated, readers will assume that data charted on a scatter plot meaningfully correlate.

Line chart: Similar to a scatter plot, but x values are unique from each other (in most cases) and represent a date or time. Points are connected in sequence by a line. In almost all cases, line charts should not be used to represent data other than time series.

Visual perception

Pre-attentive processing is the process by which users take in visual information before fully processing an image or graphic. Through this process, users give attentive weight to elements in a *visual hierarchy*. The *pre-attentive properties* that contribute to this process are:

- **Form:** Properties such as size, shape, thickness, and weight. Large or bold fonts move up the hierarchy, as do shapes or elements which contrast from their surroundings (e.g. a round marker on a rectangular bar chart).

- **Color**: Colors that contrast from their surroundings draw attention. Low saturation colors (such as dull greys) draw less attention, while bright, saturated colors draw more. Color can be used to highlight a specific data point or series of interest. *Semantic color palettes* are those that match a color to a meaning or impression (such as green for money, or red for apples). Semantic colors should never be used to represent race (such as black for African American) or gender (such as blue and pink for men and women), as it may be seen as insensitive.

- **Spatial position:** This property is the main visual *encoding* by which data are mapped to graphic elements. This might mean x and y positions on a scatter or line chart, or heights on a bar chart. The human ability to distinguish subtle differences in position, and to quickly take in patterns in position, is at the heart of most data visualization.

- **Movement:** Animated and interactive graphics take advantage of this property. An element that is in motion, or has a motion in contrast to other elements, draws the reader's attention.

Best practices

Avoid 3D charts: In general, readers take more time to process information on a 3D chart than on a 2D counterpart.

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Use direct labels: When possible, and when not too cluttered, directly label information on a chart. This might mean directly labelling categories on the axis of a bar chart instead of using a legend, it might mean adding data point labels above bars, or it mean mean calling out and labelling points of interest on a scatter plot. In general, Urban either directly labels bar charts *or* includes labelled gridlines behind the bars, but does not do both on a single chart.

Use color purposefully: Color should be used as a meaningful visual encoding. Chart elements (bars, lines, dots, etc.) may be given colors, ideally from a standardized and predetermined palette. Other elements (chart backgrounds, text, etc.) should normally not include color, unless it is meant to draw a non-standard amount of attention.

Develop a style guide: If you do not already have one, think about developing an institutional or personal style guide (perhaps in conjunction with graphic designers). This guide can standardize decisions such as font sizes, spacing, and colors, and should align with the principles of visual perception outlined above (as well as with institutional branding guidelines). From this guide, you may be able to develop templates for creating charts in your tool or language of choice.

Further resources

39 studies about human perception in 30 minutes: A literature review on visual perception by Kennedy. Speaker notes from a talk at OpenVis conference in 2016.
Link: https://medium.com/@kennelliott/39-studies-about-human-perception-in-30-minutes-4728f9e31a73
Conference video: https://www.youtube.com/watch?time_continue=2&v=s0J6EDvlN30

Why does data viz need a style guide? A conference talk from Amy Cesal on data visualization style guides, including multiple interesting examples:
Conference video: http://www.openvisconf.com/2017/#acesal-video-item

Urban institute style guide
Link: http://urbaninstitute.github.io/graphics-styleguide/

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