

HOW TO ORGANIZE A PUBLIC POLICY PANEL

**Recovery
Advocacy Toolkit**

MAKING OUR VOICES COUNT

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Organizing a public policy panel is one way to build support for more opportunities for people to recover from addiction to alcohol and other drugs by informing and engaging the public and elected officials in your city or town about the problem and offering solutions. The panel will help expand the number of community leaders and key stakeholders who are interested in working on your issues. You can use your policy panel to engage the broader public and the media in the solution by providing a place for public education and awareness. Successful public policy panels have been used on a range of issues to bring attention to a problem; explore possible solutions and develop recommendations for action.

What is a public policy panel?

A policy panel is a public event where information is gathered by a pre-selected panel on a particular topic. A report is issued based on the panel's findings that include principles and recommendations that can be implemented through advocacy. Whether it is at the community, state, or national level, a public policy panel:

1. Identifies and explains key problems
2. Reviews alternatives and solutions
3. Develops a consensus plan, or recommendations, of action steps to be taken

Why should you organize a public policy panel?

- **Help mobilize the community:** The panel is a forum to discuss local issues and engage the community in issues that people care about. Friends and neighbors have an opportunity to testify, make recommendations and participate in a public forum.
- **Build alliances:** A consensus report is strengthened by encouraging the participation of individuals and organizations who do not normally work together.

For example, a NCADD New Jersey policy panel, "Overcoming Addiction Discrimination," included the director of the Drug Policy Alliance of NJ. The panel conveners had some disagreement with the organization in the past. They decided to build a new alliance, which resulted in stronger recommendations and follow-up.

- **Educate the public:** Because panel members are visible, respected public figures, they can positively influence the attitudes of community members. When policy recommendations are publicized and implemented, there is also a change in public attitudes.
- **Promote collaboration:** Public policy panels are an opportunity to bring together organizations with mutual interests that have not worked together before. Building new partnerships can add value, prestige, and attention to a public policy panel and its recommendations.

For example, a San Diego County, CA Policy Panel was strengthened by including the Parent Teacher Association (PTA) and the sheriff's department.

12 WAYS...STEPS FOR ORGANIZING A PUBLIC POLICY PANEL

Your policy panel will reflect what's happening in your community. As you read through the 12 Action Steps below, think about how each one applies to your area.

Action Steps

1. Decide on your topic
2. Research the issue and create a briefing paper
3. Recruit panel members
4. Develop a panelist information packet
5. Develop a media strategy
6. Hold panel meetings
7. Hold a public hearing
8. Hold post-hearing meetings with panel members
9. Write the report
10. Distribute the report widely
11. Advocate for recommendations
12. Celebrate successes

1. Decide on your topic

Choose an issue that your community is facing. There are many critical issues, a few of which include: the need for housing opportunities for people newly in recovery or returning to the community after incarceration; licensure restrictions that keep people with criminal convictions from holding jobs as barbers, counselors, and in other professions; the need for addiction treatment and recovery support for young people; and funding for services.

2. Research

The next step is to research the issue so that you can describe why it is important and how it relates to your community. This information will help you select panelists and help them and people in the community understand the issue better.

“One of the greatest challenges in conducting a policy panel is... to give enough background so that [panelists] can understand it and ask questions, [bringing] people to a place of commonality and getting them to come together on what the recommendations look like and on specific strategies,” Deacon Dzierzawski.

Remember to research laws and data regarding the topic you have chosen. This information will be organized into a briefing paper for the panelists.

Briefing paper: Background information about your topic from a scientific, political, and social perspective. Sometimes organizations ask experts to write some or all of the briefing paper.

For example, when Join Together held a national policy panel on discrimination, they developed a briefing paper with the American Bar Association’s Standing Committee on Substance Abuse, using their legal expertise. You could do the same at the local level by collaborating with community college researchers, law firms, criminal justice advocates, legal aid societies or other organizations with expertise.

Here is a draft outline for a briefing paper:

- **Issue overview.** Provide a general description about the issue and why it must be addressed.
- **Data.** Provide local data that measures the problem (i.e. number of people returning to the community from treatment and/or incarceration; number of people needing sober living environment; number of young people needing recovery). This gives the panelists a sense of the problem on the local level, while providing a basis for comparison after the recommendations are implemented.

- **Obstacles.** What are the specific obstacles that face the community in addressing this issue? For instance, the background for a Join Together panel on underage drinking included statistics about alcohol advertisements targeted at youth, the price of alcohol, and loopholes in laws regarding underage alcohol possession.
- **Current laws.** What are the relevant statutes and regulations? For example, a panel on recovery housing could use rules regarding the regulation of housing.
- **Judicial history.** Is there a legal history regarding this issue? Were there court cases? This information is important because past legal precedents can give insights about possible policy recommendations.
- **Success.** What are successful strategies or policies in other communities or states? What are ineffective ones?
- **Current Efforts.** What are other local organizations and communities doing to tackle the issue? Is there a relevant bill pending in the State Legislature? The panel should be updated regarding current policy initiatives, locally, statewide, and nationally.

3. Recruiting panel members

One of the most important tasks is deciding on who you want to ask and then recruiting them. Brainstorm about possible members and make a list of the types of panelists you hope for. Then, ask others to help you think about people who might fit these roles. Once you have your ideal list of panelists, ask them to serve.

Chair: It is very important to choose a chair who is a well-known, credible community leader. The person should have experience facilitating, negotiating, and reaching a consensus.

In Ohio, a community panel on gun violence was chaired by the chief of surgery of a local hospital. Another Ohio state-wide panel on underage drinking was co-chaired by Ohio's then First Lady Hope Taft and Judge Steven Michael, a juvenile court and domestic relationship judge. Other examples of chairs include a former mayor or governor, a high profile city council member or judge, a medical professional, or the president of an organization who works closely with the affected communities.

Panelists: The panelists should be able to offer insights on the specific issue. However, they do not have to be directly involved or “experts.” Recruit members whose institutional or personal involvement is critical to achieving the policy panel’s goals. Your choice of panelists should represent a range of perspectives on the issue.

Choose panelists who are respected in the community and/or have specific expertise or a point of view. Panel members may include a prominent researcher, a medical professional, a grassroots activist, a policy maker, a current or former government official, or a person in long-term recovery or a family member. Other panelists could include a police chief, student leader, parent, school superintendent, or the district attorney. A judge or journalist may also agree to participate in panel discussions, but due to ethical considerations may not choose to take a position on the panel recommendations. You can also consider people who might not already be advocates, but are nonetheless important members of the community.

In a Santa Rosa, CA policy panel, a member of the wine industry was recruited for the policy panel on youth access to alcohol because the wine industry played an important economic role of

the community. The presence of this individual added authority to the recommendations and the issue gained the support of the wine industry.

Think about how effective possible panelists will be when they participate in the panel. Although recruiting a broad range of individuals adds credibility and wide appeal to the panel's recommendations, it may also lead to compromises, which is a result that the panel conveners may not expect. Keep in mind that this is a democratic process.

Should government officials serve on the panel?

When you're thinking about whether or not to invite public officials, take into account your local political climate. You may want to form alliances with government officials, ask them to testify, or remain completely independent of them. Remember to include key governmental officials if their involvement is necessary to act.

How do you keep panelists involved?

The panel is a time-limited commitment. Let panelists know what will be involved if they serve. Use their time wisely by keeping your meetings focused and organized. Give panelists all relevant background information and brief them as needed.

4. Panelist information packet

Once you choose your panel, schedule its first meeting and send each member a background information packet. The packet should give the panelists a general idea of the problem and help them think about how they want to move forward.

The information packet may include:

- A briefing paper on the topic
- Agenda for first meeting
- Expert recommendations and reports
- Research
- Newspaper articles, especially local articles that highlight the issues and bring them to life
- Panelists' biographies

5. Develop a media strategy

You will want to use the media to publicize the panel's events and draw attention to the issue. The public hearing, release of the panel's recommendation, and follow-up activities are all media opportunities. Take advantage of these events to educate the public about the need for improved policies and particular policy issues that can be addressed.

Here are some tips for developing a media strategy:

- Find people in your network who can help you because of their communication, marketing, or media skills
- Schedule meetings with newspaper editorial boards and local broadcasters and brief them on the issue and the importance of the policy panel to your community
- Send flyers or media advisories to targeted groups and individuals; follow up with phone calls
- Post information on community websites
- Invite journalists to be a part of the policy panel
- Develop the media strategy using the dates for events like the hearing and publication of the panel's recommendations
- Issue a press release announcing the policy panel as a foundation for talking about the issue - The release can include a call to action for the community to attend the panel. After the panel, plan to issue a release on the outcomes and next steps for the community.

- Communicate with the media and be strategic in building a relationship with them by:
 - Clarifying your media message and the key points that you want to communicate
 - Reviewing the media’s coverage of addiction prevention, treatment, and recovery to prepare for the first meeting
 - Preparing a media kit with a backgrounder on the issue to be discussed including the key points from the briefing paper; biographies of the panelists; local statistics (1-page fact sheet on the issue; and an agenda for the meeting
 - Sending media advisories and press releases to local newspapers
 - Being patient. Sometimes, you have to wait until the issue is “ripe,” which is a matter of issues and events converging.
 - Being persistent!

For more tips on how to develop an effective media strategy, please refer to “How to Reach Out to the Media” section of this toolkit.

6. Hold panel meetings

You can invite the panelists to a dinner or breakfast before they formally convene so that they can meet and get to know one another before their first meeting. You may also want to invite an outside speaker for a brief, informal exchange of information and questions

This meeting is to let panelists know about their responsibilities and that their role goes beyond representing the particular interests of their organization or constituency. They have been brought together to forge a consensus for the entire community.

You should decide if someone will “staff” the panel and attend the meeting. Usually the panel meets to make its recommendations behind closed doors, but you might want to include a representative of the organizing group and you should have someone to take notes at the panel’s meetings.

Because the panel’s discussions will result in recommendations, you will need a skilled note taker. The note taker could be a coalition member or a professional writer who you ask to take notes. You may want to record the panel’s meeting to clarify any questions from the note takers. Make sure that you have a detailed agenda, starting time and ending time for your panel’s meeting.

The panel’s first meeting is critical for setting the stage for the rest of its work. The purpose of the meeting is:

1. Get to know one another
2. Understand the issue at hand
3. Narrow down how the issue will be addressed
3. Create a timetable

7. Hold a public hearing

- Chose a location that will work well. Think about the size of the room and the number of people you expect. It’s not great to have a large auditorium with very few people in it. Have a registration table for people to sign in. Anyone wishing to testify should sign in before the hearing begins. (They will be called to testify in the order they signed in. These presenters should also provide written testimony for the record). If the media is expected, a media registration area with a press kit including the press release and information about the panel members should be set up. Also, you may want an information table where organizations can put out information and copies of their testimony.
- The hearings should be conducted similar to the hearings for a bill in a state legislature. The only difference is that they will be conducted and facilitated by the chair of the policy panel instead of legislators.

- “Call for witnesses” and decide who will testify. The process of recruiting people to testify is similar to how you recruited panelists. You may want to ask people to testify who were on your original list of potential panelists who did not end up on the final panel. Let allied organizations know about the opportunity to testify. You can give people the opportunity to submit testimony via e-mail if they aren’t able to attend. Be strategic in soliciting invited testimony to cover all of the areas that need to be addressed; both the pros and cons need to be tackled.
- Publicize the hearing, including information on the date, location, times, speakers, and panel members.
- The meeting should begin with a call to order by the chair, followed by opening remarks and, possibly, lead testimony from a prominent person.
For example, lead testimony from Join Together’s Discrimination policy panel hearing came from former first lady Betty Ford.
- Transcribe or record the hearing(s).

8. Hold post-hearing panel meetings

Panelists may decide that they still need more testimony. Additional presenters may be invited to speak at post-hearing panel meetings.

These meetings are where the panel develops and finalizes its recommendations. Initially, the panel may have many suggestions. Because the number of recommendations that can be included in the report should be limited to maximize the report’s impact, the panel will negotiate and come to an agreement on specific wording used to describe them. To do this, they should discuss how the recommendations could be implemented and the role of the community in advocating for them. Before the panel begins its deliberations, the hearing transcripts should be distilled and draft recommendations should be developed for the panel. As the deliberations continue, provide updated draft recommendations until the panel reaches a consensus.

These negotiations can take some time and involve a lot of discussion by the panelists. Although most past community panels issue unanimous recommendations, there are some cases in which the panel was polarized and the resulting report includes a minority opinion.

9. Write the report

There is flexibility in writing a report from a public policy panel. Usually, they include a letter from the panel chair, list of panelists, an introduction, the recommendations, and some next steps for implementation.

- Letter from the panel chair: Ask the chair to write a letter introducing the recommendations report. It can include his/her personal thoughts, how the panel worked, how the process affected the panelists, and the importance of the recommendations.
- List of panel members, their organizations and titles.
- Information about the sponsoring organization, partnering organizations and contact information.
- Introduction. Much of the background information about the problem can come from the briefing papers. Use data to inform the readers of the pervasiveness of the issue and why a policy panel was necessary.
- Recommendations: Outline each recommendation. Provide a detailed description, including relevant background information, the rationale for the recommendation, and the appropriate action steps needed for implementation.

10. Distribute the report widely

Get the report out to as many people and organizations as possible. Ask partners and panel members to write their own cover letters supporting and personalizing the report and send it to their own constituencies or membership organizations. Your coalition and panel members could use their

partnerships and adopt similar methods to distribute highlights of panel recommendations and information about where to get a full report.

“Parents Who Host,” an Ohio community dedicated to underage drinking prevention, disseminates their message through partnering with local corporations in the community. Some corporations put messages in paychecks of their employees, and others, such as grocery stores, distributed flyers.

11. Advocate for the recommendations

It takes time to implement recommendations. That is why it is important that you get together with allied organizations to develop a strategy for implementing the recommendations. Some recommendations may require the enactment of legislation; others may call for regulatory changes. Develop an action plan for carrying out the panel's recommendations.

12. Celebrate successes

Hold a celebratory event after releasing the recommendations report, after one of the recommendations has been implemented, or at the one-year anniversary of the release of the panel's recommendations. It's important to celebrate our activities and achievements because it:

- Reenergizes and motivates advocates and allies
- Serves as a way to thank the panelists and acknowledge their work and leadership
- Provides a media outreach opportunity

SUGGESTED READING

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- The Connecticut Health Foundation. Pathways to Equal Health: Eliminating Racial and Ethnic Health Disparities in Connecticut. March 2005.
- Ending Discrimination Against People with Alcohol and Drug Problems
Members of a 2002 national policy panel developed two principles and ten recommendations to help address discrimination against people with alcohol and drug problems. 01/11/2006 (Resource) please add this policy panel

Adapted from: **How To Do A Public Policy Panel** at www.jointogether.org.

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