

SPN NEWS

STATE POLICY NETWORK

STRATEGIES FOR STATE THINK TANKS

SUMMER 2001

The Personal Touch

By John M. Hood

State think tanks, like their national counterparts, are in the business of developing and promoting ideas. For many of us, however, the former is the more congenial task. Some think tank leaders come from the ranks of academia. Others have experience in government, business, or trade associations. Whatever our origins, we tend to focus more on producing the ideas than on promoting them.

When we do turn our attention to marketing our efforts, we all too often fail to recognize the importance of personal relationships. You can spend thousands of dollars on glossy, graphics-intensive reports. You can send mountains of mass mailings or blast faxes. You can produce expensive advertising or award-winning web sites. But the reality is that the extent to which your work actually influences the policymaking process in a state legislature or local government is highly correlated with the quality and quantity of your personal contacts.

In military terms, what I am talking about is a "force-multiplier." Throughout history, small armies have often defeated larger ones because they made better use of weaponry, fortifications, training, or tactics. By mastering these force-multipliers, the numerically inferior were able to overwhelm their foes by placing their forces where and when they were most needed. Alexander the Great was a master of this; at the decisive battle of Gaugamela in 331 BC, his army of about 40,000 defeated Darius' Persian army of more than 200,000.

For state think tanks, this is good news. We face a daunting array of ideological rivals – be they tenured radicals in universities, labor unions, liberal foundations, or left-wing think tanks and activist groups. The idea that we – the few, the proud – can prevail anyway is deeply reassuring.

Developing personal relationships is a costly process, however. It means committing substantial time and energy to several important tasks. They include:



John Hood, President, The John Locke Foundation, Raleigh, North Carolina

Gathering Intelligence

It's not enough to assemble a mailing list of legislators, county commissioners, or newspaper editors. You need phone numbers, fax numbers, e-mail addresses, and committee assignments. With governmental bodies, you need the names and numbers of the employees who staff the committees with

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SPN News reports on issues of importance to state-based, market-oriented, non-profit public policy research organizations. Drawing from current updates and events from within the industry, the publication provides timely information on the most pressing issues facing public policy state think tank executives. State Policy Network publishes *SPN News* quarterly. Individual copies can be ordered from the State Policy Network offices (510) 965-9700.

MISSION STATEMENT

The mission of State Policy Network is to provide strategic assistance to independent research organizations devoted to discovering and developing market-oriented solutions to state and local public policy issues.



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The Personal Touch

jurisdiction over your issues, since they usually come up with agendas, invite speakers, and draft bills. With the news media, you have to keep a comprehensive and constantly updated file on who covers what. Reporters are frequently moved around, so you have to keep up with beat assignments or risk sending your information to the wrong person (don't count on them to re-route it).

Gaining Credibility

We complain too much about media bias. I have found that if you focus on making yourself useful to a reporter, you will get good coverage regardless of his or her personal views. Usefulness derives from 1) providing accurate information, 2) being available on short notice, and 3) supplying news rather than just commenting on it. Reporters are always looking for a good story, particularly one that will get them on the front page (where they all think they belong).

"By cultivating personal relationships with people in a position to act on or publicize your ideas, you can enjoy a level of impact in your state out of proportion to your relatively small size and staff."

Giving Face-Time

Human nature being what it is, folks are less likely to dismiss your work or savage your views if you have met them face-to-face. So make it a point to meet and mingle, particularly during legislative sessions. And offer private meetings with important speakers you might bring into town. Such personal gestures often mean a lot to those you are trying to get to know.

Narrowcasting

In today's world of e-mail groups and broadcast faxes, the temptation is to send out as much as possible to as many people as possible. Resist it. If your missives become the public policy equivalent of junk mail, they will have a similarly negative affect on your intended audience.

By cultivating personal relationships with people in a position to act on or publicize your ideas, you can enjoy a level of impact in your state out of proportion to your relatively small size and staff. In other words, be Alexander, not Darius. □

John M. Hood, President, John Locke Foundation (Raleigh, NC).



Christina Smith Joins SPN

Industry executive will direct Leadership Development Initiative

State Policy Network welcomes Christina K. Smith to its staff as Director of Leadership Development. In this new role, Christina will work closely with SPN President Tracie Sharp and Project Director Jo Kwong to spearhead the design and expansion of SPN's Leadership Development Initiative. She also will assist with the organization's fundraising efforts.

The Leadership Development Initiative will provide a more comprehensive array of leadership and management training programs targeted to assist member groups in becoming more effective and successful advocates for economic freedom in their respective states. Key objectives include:

- provision of enhanced professional development and training opportunities for think tank professionals, volunteers, board members, and intellectual entrepreneurs interested in launching new policy institutes;
- development of a professional peer mentoring program to facilitate hands-on, intensive training for new start ups and to expand the collaboration and exchange of knowledge and experience between established groups and new or prospective organizations;
- sponsorship of intensive topical training workshops that provide interactive, nuts and bolts assistance with key issues of organizational growth, including fundraising, marketing, membership development and recruitment; and
- establishment of a comprehensive think tank training school for industry executives.



*Christina K. Smith,
SPN Director of Leadership Development*

"As the free market movement grows, so does the industry-wide demand for management and leadership training."



The leadership behind SPN: From left, Carl Helstrom (Chairman), Christina K. Smith (Director of Leadership Development), Tracie Sharp (President) and Jo Kwong (Project Director)


Christina brings to State Policy Network a wealth of experience in think tank management and resource development. Most recently, she was Vice President for Advancement at the Mackinac Center for Public Policy where she spearheaded a \$3 million development program. Christina is best known to many SPN members as a very popular and highly rated presenter at the Mackinac Center's biannual Leadership Conference. She previously led successful advancement efforts at the Acton Institute and the Intercollegiate Studies Institute.

As the state-based, free market movement grows, so does the industry-wide demand for management and leadership training. SPN's Leadership Development Initiative will work closely with the Mackinac Center to complement and build upon the Center's

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Building Effective Leadership

Conference specializing in training for state think tanks

 n June 15 and 16, executives from 22 different state think tanks gathered in Washington, DC, to participate in the State Policy Network's Leadership Development Weekend.

SPN teamed up with The Heritage Foundation, American Legislative Exchange Council (ALEC), and the Leadership Institute to deliver this two-day program of networking opportunities, media strategies and advancement training.

The Heritage Foundation, at its Washington, DC headquarters, organized the two opening day sessions. The first, entitled "Partnering Opportunities," featured speakers who discussed opportunities for cross cultivation between their organizations and

"SPN teamed up with The Heritage Foundation, American Legislative Exchange Council (ALEC), and the Leadership Institute to deliver this two-day program of networking strategies, media development and advancement training."



From left: Helene Denney (Nevada Policy Research Institute), Lee Hinkle (James Madison Institute, Florida), and Tracie Sharp (SPN) discuss advancement and marketing issues at the direct mail training session



From left: John McClaughry (Ethan Allen Institute, Vermont) Genevieve Wood (Family Research Council) and Ron Williamson (Great Plains Public Policy Institute, South Dakota) at the media training workshop

state think tanks. Michael Flynn (ALEC) encouraged constructive ways to work with state legislators, stressing how to tailor the free-market message to meet their needs and interests. Paul Beckner (Citizens for a Sound Economy) emphasized how partnerships with their state grassroots organizations help mobilize people who have a fundamental understanding of the founding principles of limited government. Leonard Leo (The Federalist Society) described how its lawyers are partnering with state groups to effectively pursue legal strategies.

Lunch speaker, John Fund (*The Wall Street Journal*) discussed how to leverage media contacts. Additionally, he suggested that state groups recruit former journalists to their ranks,



Christopher Summers (left) and Walt McKee lead one of the recent start-ups, the Maryland Public Policy Institute

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Policy Breakfast & White House Briefing

On April 18, 2001, SPN members were invited to a White House briefing with the Bush Administration's education and welfare reform policy representatives. Twenty state think tank CEOs were on hand to discuss state policy issues with administration policy leaders. Karl Rove, Senior Advisor to President Bush, addressed the SPN members at a special luncheon, followed by afternoon discussions with Lawrence Lindsey (Assistant to the President for Economic Policy). Former think tank leaders Don Eberle and Nina Rees, now policy advisors in the Bush Administration, also gave afternoon presentations.

The day after the White House briefing, SPN members shuttled to Philadelphia for The Heritage Foundation's 24th Annual Resource Bank Meeting. This year, State Policy Network and the Atlas Economic Research Foundation partnered with Heritage, attracting 453 attendees (108 CEOs) representing 251 organizations - a 20% increase from last year. Thanks to Atlas' involvement, 17 countries were represented.

"Former think tank leaders Don Eberle and Nina Rees, now policy advisors in the Bush Administration, also gave afternoon presentations."

Over 100 state and national policy research leaders attended the SPN Breakfast just prior to the opening of the Resource Bank Meeting. Grover Norquist, President of Americans for Tax Reform, outlined post-election policy trends in the states and provided action strategies for emerging issues.

Following breakfast, former U.S. Attorney General Edwin Meese moderated a SPN panel on the recently intensifying policy battles revolving around states' property rights. Featured panelists included Ron Utt (The Heritage Foundation), William Mellor (Institute



Grover Norquist, President, Americans for Tax Reform at the SPN Policy Breakfast

for Justice), John Charles (Cascade Policy Institute) and Robert Harrison (Defenders of Property Rights). □



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Christina Smith Joins SPN

ongoing and widely celebrated Leadership Conferences.

Christina comments, "I'm very excited about the opportunities this new initiative presents to help nurture strong leadership and management skills within the free market movement. I am eager to work alongside the many wonderful, committed champions of freedom who look to SPN for assistance and support in advancing liberty." SPN Board Member and Mackinac Center President Lawrence Reed adds: "Christina's exceptional friendraising and fundraising abilities are among the very best in the industry. These skills, in particular, will be of tremendous benefit to SPN groups who need assistance with resource development."

Future issues of *SPN News* will provide additional details on new

training programs associated with SPN's Leadership Development Initiative. Meantime, SPN groups are encouraged to call upon Christina at her office in Midland, Michigan for assistance and to share training needs. She can be reached directly at:

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Growing Influence of State Groups

SPN members making a difference; progressive publication takes notice

The ascendancy of free market ideas and the ability of state-based groups to put these ideas into action at the local level is capturing more national attention – this time from progressive forces opposed to market-oriented policy solutions.

A recent article by the progressive magazine, *The American Prospect*, testifies to the growing impact of the free market policy movement and demonstrates the extent to which the battle lines in key policy debates are increasingly at the state level. In the short excerpt below from the June 18, 2001 issue, one political strategist points out: "...progressives have by and large been put on the defensive."

CLASH IN THE STATES Can progressive nonprofits match their conservative rivals?



Many people think of Oregon as a liberal bastion: an "ecotopia" where environmental protection is a priority, the law permits the terminally ill to choose death over protracted suffering, and citizens once voted by initiative for the highest state minimum wage in the country.

But in fact, conservatives have quite a foothold in Oregon. ...New conservative legislators have found powerful allies to help them shape their antigovernment agenda, including local right-wing groups such as the Cascade Policy Institute, as well as two major national organizations with a strong presence in Oregon: the American Legislative Exchange Council (ALEC) and Citizens for a Sound Economy (CSE). Both ALEC and CSE are funded in large part by corporations intent on rolling back taxes and government regulation....

"State Policy Network, founded in 1992 and based in California, now includes more than 40 state-policy institutes. Two of its largest members, the Pacific Research Institute in California and the Mackinac Center for Public Policy in Michigan, operate on a scale comparable to national organizations."

It's true that progressives in Oregon have been stronger than those in many other states – a result, in large part, of outside funding from major foundations like Ford and the Open Society Institute. But as political strategist Tom Novick points out, Oregonian progressives have "by and large been on the defensive."

For conservative philanthropists and political operatives, success in Oregon vindicates farsighted efforts begun in the 1980s to develop an infrastructure focused on moving a rightwing agenda at the state level. Over the past 15 years, total investments in this infrastructure by conservative foundations like the John H. Olin and Bradley Foundations, as well as major donors like energy tycoon David Koch, have exceeded several hundred million dollars. The conservative State Policy Network, founded in 1992 and based in California, now includes more than 40 state-policy institutes. Two of its largest members, the Pacific Research Institute in California and the Mackinac Center for Public Policy in Michigan, operate on a scale comparable to national organizations, with budgets in 1999 of \$2.6 million and \$2.2 million, respectively. The Heartland Institute in Chicago now has a staff of 10 and a budget of \$1.2 million-much of it coming from its lineup of more than 125 corporate donors. In Oregon, the Cascade Institute has a budget of a half-million dollars, twice that of its liberal counterpart, the Oregon Center for Public Policy.

"Spending by national conservative organizations to influence public policy in state capitals has risen sharply in the past decade.... These conservative investments mean that state-level progressives often find themselves up against powerful coalitions."

Meanwhile, spending by national conservative organizations to influence public policy in state capitals has risen sharply in the past decade....

These conservative investments mean that state-level progressives often find themselves up against powerful coalitions that include local business associations, grassroots religious activists, and well-financed Republican politicians-as well as skilled policy experts backed by national foundations and major corporations.

Antigovernment efforts in the states have been pursued in tandem with the conservative crusade to shift

federal programs to state and local entities. This “devolve and destroy” pincer strategy is likely to be employed to great effect under President George W. Bush.

At times progressive forces have scored important gains in the states, even as these arenas have historically been dominated by business interests and hospitable to reactionary agendas. But lately the tide in the states has shifted decisively to the right.

“Large, mainstream foundations like Ford and Carnegie have come to understand the need for new investments in policy organizations geared toward doing battle in the states (an insight, alas, that came at least a decade after conservative funders began pouring big money into this arena).”

New investments in state work by left-of-center philanthropists are laudable but inadequate, with progressives often finding themselves outgunned by right-wing organizations with deep pockets and an ever growing number of allies in state government. “The disconnect between what is spent now and what it would cost [progressives] to become a long-term opposition force is considerable,” says Jeff Malachowsky of the State Strategies Fund, a group co-chaired by Mark Schmitt of the Open Society Institute and Geraldine P. Mannion of the Carnegie Corporation that was formed to channel greater philanthropic resources into state-level work. The social and economic stakes are high.

Veterans of state-policy battles say it’s time for progressives to think more strategically and link their state work to national policy debates.

Building and sustaining statewide coalitions is not easy work. In Oregon, for example, the Ford Foundation has tried to nurture a collaboration among four groups: the Rural Organizing Project, the Oregon Center for Public Policy, the Oregon Fair Share Research and Education Fund, and Causa (an immigrant rights coalition). This has opened lines of communication that didn’t previously exist and has yielded concrete partnering on a statewide campaign centered on food stamps.

Large, mainstream foundations like Ford and Carnegie have come to understand the need for new investments in policy organizations geared toward doing battle in the states (an insight, alas, that came at least a decade after conservative funders began pouring big money into this arena). Less clear is whether such foundations are willing to pony up the kind of serious

More information can be found at the Capital Research Center



**Capital
Research
Center**

For more information on the state-based think tank movement, please see two excellent articles recently published by the Capital Research Center:

- “Thomas Roe’s Legacy” by Louis James in *Foundation Watch*, June 2001.
www.capitalresearch.org/fw/fw-jun01.pdf
- “A Vast Left-Wing Conspiracy?” by John Hood in *Foundation Watch*, April 2001.
www.capitalresearch.org/fw/fw-0401.htm

money that is needed to make a real difference. Also, greater foundation funding alone is not the solution. State-level groups and regional centers need to do a better job of attracting individual donors who are comfortable with an agenda that often can be quite partisan. They also need to cultivate allies in the business community in order to build a broader funding base. For example, by establishing connections with the local high-tech community, Dianne Stewart, executive director of the Center for Public Policy Priorities in Austin, Texas, secured new donors for the center and enlisted their help in policy advocacy. Finally, state-level progressives need stronger membership-based organizations that can be financially self-sustaining and mobilize large numbers of citizens for political action.

“State organizations can bring large constituencies to the ongoing debate and help check the influence of conservative policy organizations in Washington. With a Bush presidency holding the promise of new devolution crusades, finding ways to plug state groups into national politics becomes all the more urgent.”

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Growing Influence of State Groups

Bigger philanthropic investments in the states and cultivation of unlikely allies and new citizen advocates must go hand in hand with fresh strategic thinking. In particular, new strategies are needed to inject state voices into national policy debates-especially around devolution issues....

A louder voice for state groups is badly needed to underscore the real (and often disastrous) human consequences of devolution. State organizations can bring large constituencies to the ongoing debate and help check the influence of conservative policy organizations in Washington. With a Bush presidency holding the promise of new devolution crusades,

finding ways to plug state groups into national politics becomes all the more urgent. □

For the full text of this article, please see
www.prospect.org/print/V12/11/callahan-d.html

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Building Effective Leadership

noting that they not only write well, but also bring vital media connections.

In the afternoon, participants were treated to an in-depth media training session conducted by Genevieve Wood (Family Research Council) who delivered a highly informative presentation on communications, especially in television.

In the evening, ALEC hosted SPN participants to dinner at Washington's University Club. Doug Bandow, senior fellow at the Cato Institute and syndicated

columnist, offered insights on communication strategies for battling prescription drug pricing efforts.

The next day, in Arlington, Virginia, the Leadership Institute presented an intensive version of its "High Dollar, Low Volume" direct mail program. Speakers included Kevin Gentry from the Mercatus Center, and several Leadership Institute direct mail specialists.

Thanks to generous support from contributors, SPN was able to offer many scholarships to help defray the costs of hotel and travel for its participants. This opportunity was particularly important to the handful of new institute entrepreneurs. Participants from Maine, Maryland, Kentucky and Idaho, who are currently in the process of establishing new state-based think tanks, were given the chance to learn from the more established institutes. □



Development officers Priscilla Ruzzo (left) of the Pioneer Institute (Massachusetts) and Jennifer Mamich, Independence Institute (Colorado) at the direct mail training school

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Check it out and
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