

# Understanding Education, Advocacy, Influence & Lobbying

How to stay effective *and* compliant

# The 1-Question Test



*Are we asking someone to take a specific action on a specific policy?*



This question determines everything.

# EDUCATION = INFORM

- Facts only
- No opinion
- No ask

**Example:** “20% lack access to transportation.”

# ADVOCACY = CARE

- Takes a position on an issue
- Focus on values or impact
- No specific policy ask

**Example:** “People with disabilities deserve reliable transportation.”

# INFLUENCE = SHAPE

- Suggests a solution or direction
- Policy may be referenced
- No direct ask

**Example:** “Increasing transportation funding would improve employment outcomes.”

# LOBBYING = ASK

- Specific action (vote, fund, oppose)
- Specific policy (bill, budget, regulation)
- Direct request

**Example:** “Vote YES on HB 123.”

 **Restricted with federal funds**

# Quick Guide

-  **Inform** → Education
-  **Care** → Advocacy
-  **Shape** → Influence
-  **Ask** → Lobbying

# Advocacy vs. Influence vs. Education vs. Lobbying

Am I asking someone to take a specific action on a specific policy? ▶

 <b>EDUCATION</b> <i>Share Facts</i>	 <b>ADVOCACY</b> <i>Speak Up</i>	 <b>INFLUENCE</b> <i>Shape Ideas</i>	 <b>LOBBYING</b> <i>Push for Action</i>
No opinion, no ask	Take a position, no specific policy	Suggest direction, implied ask	Ask for a specific policy effort
<i>"20% of people with disabilities lack access to transportation."</i>	<i>"People with disabilities deserve reliable transportation options."</i>	<i>"More transit funding would help people with disabilities find jobs."</i>	<i>"Vote YES on HB 123 for transit funding!"</i>

## 1-Question Test: Quick Guide ▶



## Memory Trick

<b>INFORM</b> <i>Education</i>	<b>CARE</b> <i>Advocacy</i>	<b>SHAPE</b> <i>Influence</i>	<b>ASK</b> <i>Lobbying</i>
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**REMEMBER:** Lobbying is restricted with federal funds!

# Resource Alert!

Download this one-page resource to help stay on track.

[Advocacy/Influence/Education/Lobbying](#)



# Prioritizing Strategic Policy Engagement



Austin Nugent  
Johnny Callebs

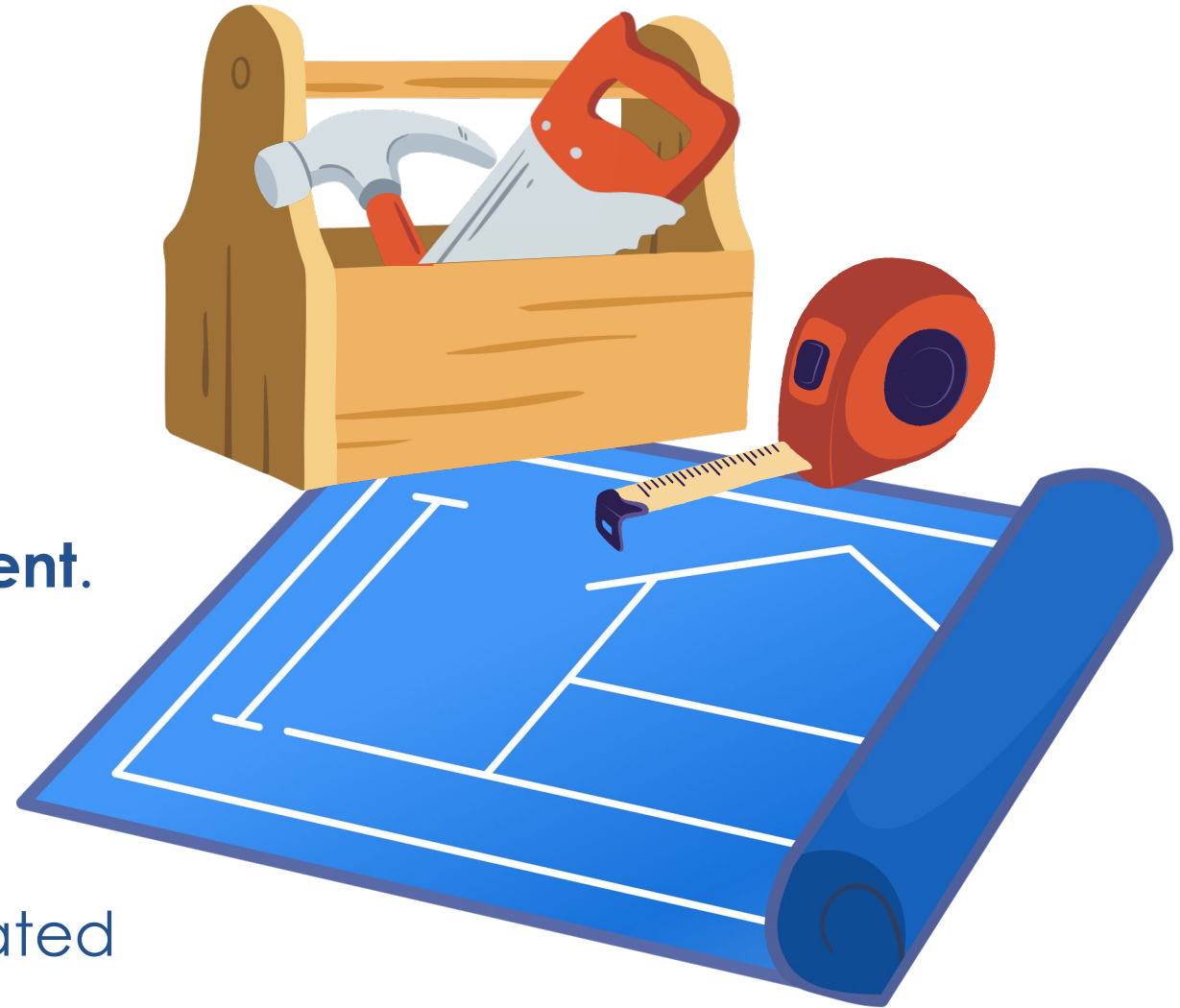


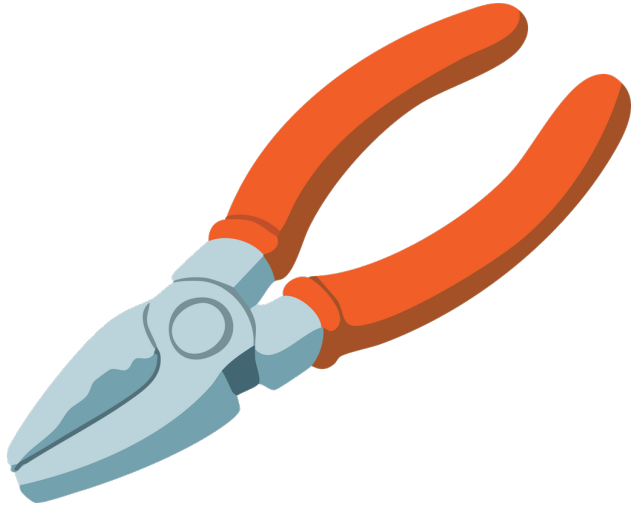
*Kentucky's DD Council*



# House Keeping

- We will share **tools to help your DD Council prioritize policy engagement.**
  - Kentucky's DD Council did not develop these materials.
- We are **not discussing the “what”** (policy issues).
  - Please do not discuss policy-related issues during this session.





“If everything is  
a priority,  
nothing is”

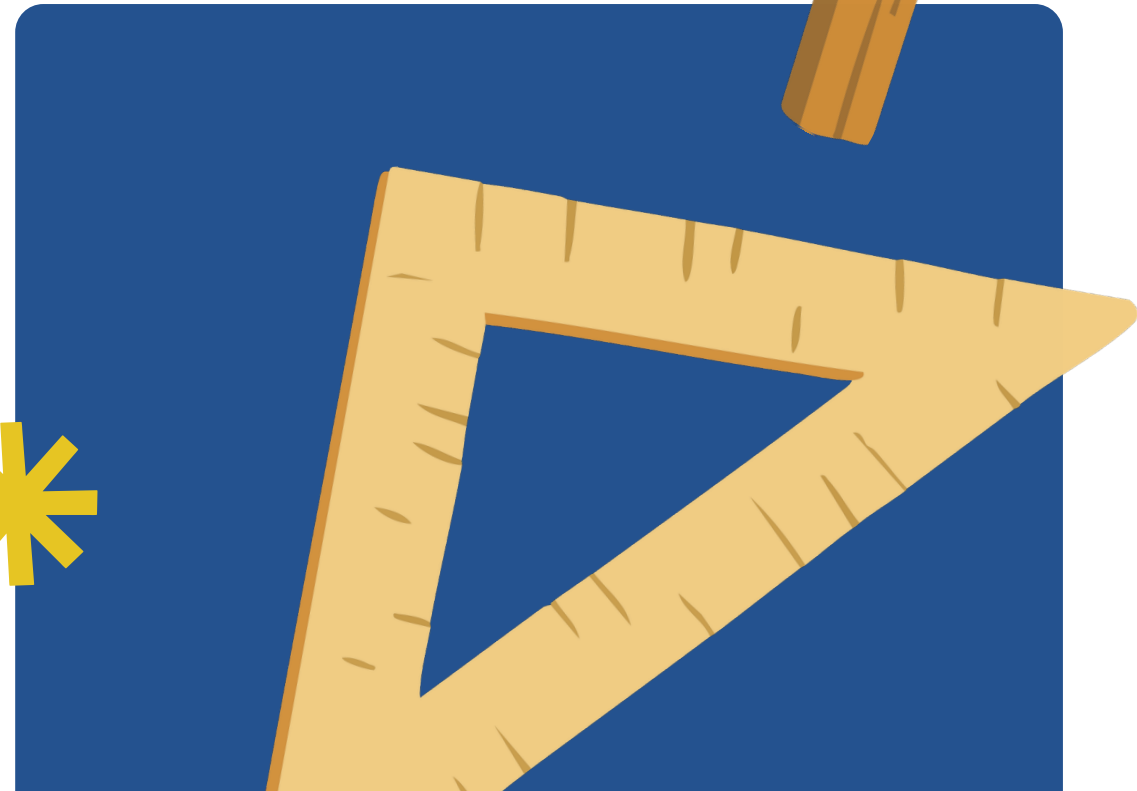
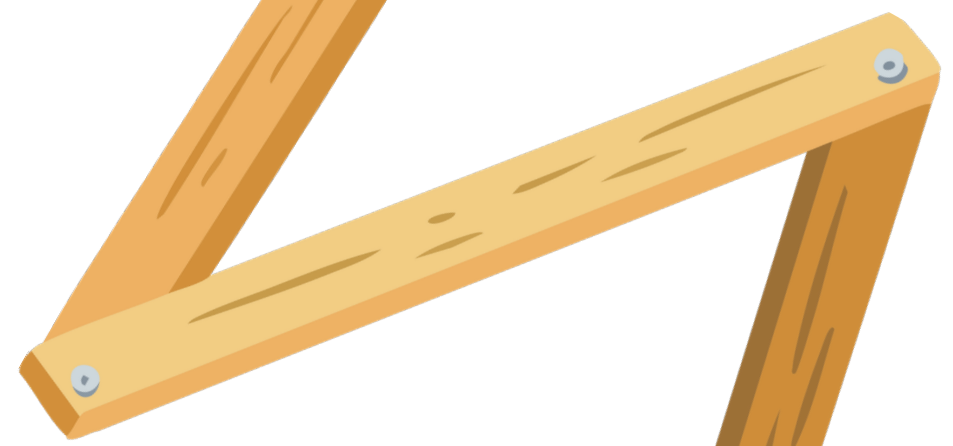


- You cannot say yes to everything!
- These tools will give you **permission to say no.**



# Think About Your State

- We will not be discussing specific policy issues – just the policy engagement tools.
- As we work through the tools, **think to yourself about an issue in your state.**
- Please **do not put any policy issues in the chat**, as we cannot address specific policy issues in this session.



# Eight Filters *for* Prioritizing Emerging Public Policy Issues

## Council Policy Issue Screening Checklist

Use these eight filters to decide:  
*Should the Council take action on this issue?*



**Mission Alignment**  
✓ Does it align with our mission?



**State Plan Connection**  
✓ Is it tied to our State Plan?



**Impact Potential**  
✓ Will it create systems change?



**Council Authority**  
✓ Is this our role to play?



**Timing & Opportunity**  
✓ Is this the right time?



**Stakeholder Voice**  
✓ Do those affected support it?



**Resources & Capacity**  
✓ Do we have the resources?



**Partnership Potential**  
✓ Can we collaborate on it?

Rate Each Filter: 0 = No • 1 = Limited • 2 = Moderate • 3 = Strong

Total Score: \_\_\_\_\_

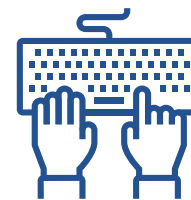
**19–24** High Priority – **Take Action**

**13–18** Monitor or **Limited Engagement**

**7–12** Track for **Future Review**

**0–6** Do Not **Prioritize**

## Access Resource



<https://bit.ly/8Filters>

**SCAN  
ME!**





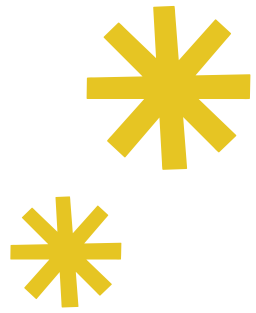
# Rate Each Filter



0	1	2	3
No	Limited	Moderate	Strong



- **19-24:** High Priority – **Take Action**
- **13-18:** Monitor or **Limited Engagement**
- **7-12:** Track for **Future Review**
- **0-6:** Do Not Prioritize



### Mission Alignment

✓ Does it align with our mission?



### State Plan Connection

✓ Is it tied to our State Plan?



### Impact Potential

✓ Will it create systems change?



### Council Authority

✓ Is this our role to play?



### Timing & Opportunity

✓ Is this the right time?



### Stakeholder Voice

✓ Do those affected support it?



### Resources & Capacity

✓ Do we have the resources?

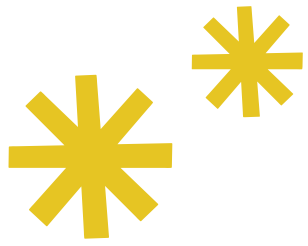


### Partnership Potential

✓ Can we collaborate on it?

# Policy Screening & Engagement Tool





# Policy Engagement Ladder

Matching Council **Engagement Intensity** to **Policy Issue Priority**

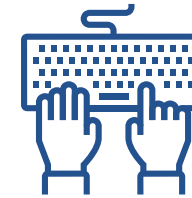
After a high-screening score, Councils use this ladder to determine:  
**What level of Council engagement is appropriate?**



**Recommended Practice:** Scale engagement **up** or **down** as needed.

- Respect other partners' roles and voices.
- Document steps to justify the level of engagement.
- Guide: **19–24** screening score = **Levels 4–5**
- Guide: **9–18** screening score = **Levels 1–3**

## Access Resource



<https://bit.ly/PolicyLadder>

**SCAN ME!**





## 1 Awareness & Monitoring

- Track issues closely
- Receive reports
- Share information



## 2 Learning & Exploration

- Issue recommendations value
- Partners working separately
- Shared learning would help



## 1 Awareness & Monitoring

- Track issues closely
- Receive reports
- Share information



### 3 Convening & Education

- Host public forums
- Educate stakeholders
- Facilitate cross-agency dialogue



### 2 Learning & Exploration

- Issue recommendations value
- Partners working separately
- Shared learning would help



### 1 Awareness & Monitoring

- Track issues closely
- Receive reports
- Share information

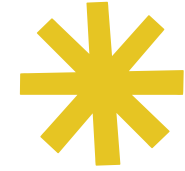


Engage at this level if  
filter tool  
rating = 19-24





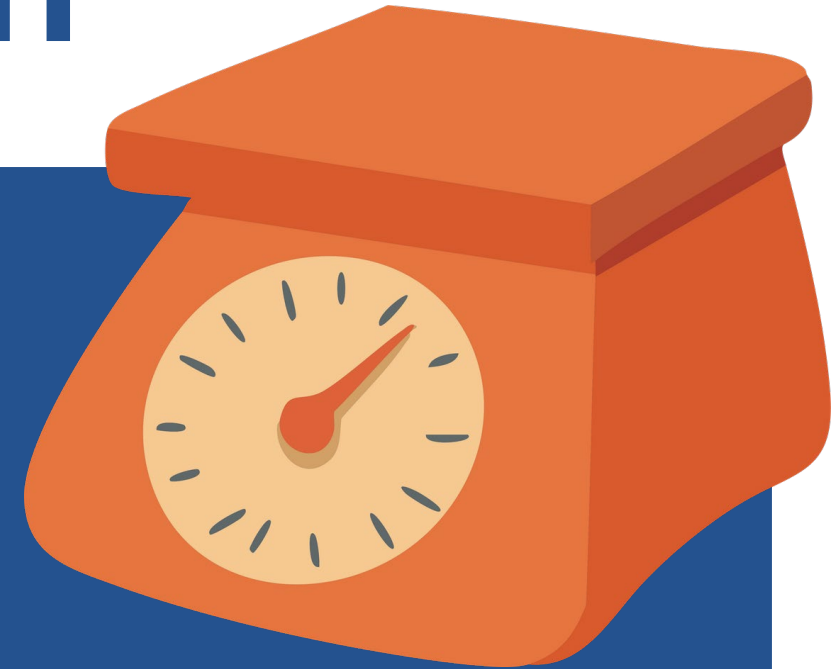
Engage at this level if  
filter tool  
rating = 19-24

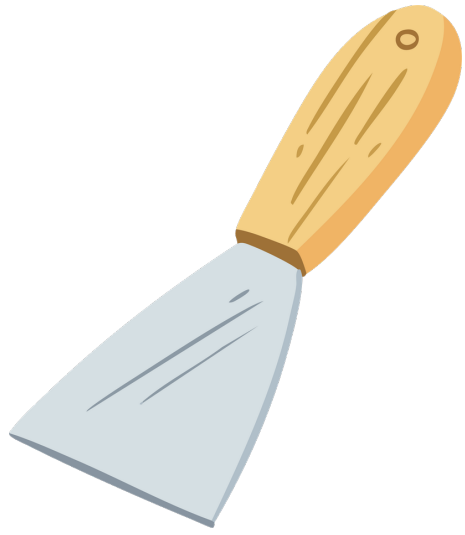




# Recommendation

- Scale engagement **up** or **down** as needed.



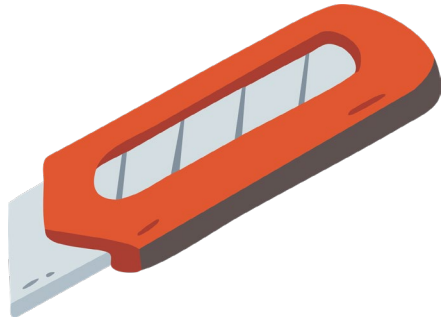


Questions or  
thoughts about  
these tools?





Thank  
You





**Kansas Council on Developmental Disabilities  
(KCDD)**

***Our Approach to Navigating Current  
& Emerging I/DD Policy Issues in the  
Sunflower State***





**KCDD**  
Kansas Council on  
Developmental Disabilities



**Sara Hart Weir**  
Executive  
Director



**Allyson McCain**  
Deputy Director and  
Director of Health  
Equity and Outcomes  
Coalition



**Josh Alters**  
Vice Chair

**Our Mission:** Empower individuals with intellectual and developmental disabilities (I/DD), families and caregivers to lead systems change, build capacity, and advocate for inclusive, integrated, accessible communities where everyone belongs and thrives throughout Kansas.

**Our Vision:** We envision a state where all people with intellectual and developmental disabilities live, learn, work, play, belong, and thrive in the community they choose.

**Our Purpose:** The purpose of KCDD is to support people of all ages with developmental disabilities so they have the opportunity to make choices regarding both their participation in society and their quality of life.



A group of people stand gathered around a wooden desk as Governor Laura Kelly sits and prepares to sign a bill. She is smiling and looking up at a young woman with glasses standing beside her, who is also smiling back. Several others—men and women in professional attire—stand behind them, watching the moment with pride.

- **Quarterly Council Meetings - held across Kansas**
  - Q4 Council Meeting - involves a robust legislative issue discussion and preview
  - Alignment with KCDD Five-Year Plan & NACDD Priorities
  - Waitlist, Waiver & Workforce Campaign (approved in our Strategic Plan)
- **Monthly Executive Committees with Policy & Programming Updates via Staff**

- **A powerful day at the Capitol**—bringing Kansans with I/DD and their families together to share lived experiences, make their voices heard, and actively shape the Council’s mission and priorities
- **Equipping advocates to lead:** Plain-language briefing packets provide clear background and practical talking points for meaningful legislative meetings
- **Building confident advocates:** “Advocacy 101” training prepares attendees for what to expect, how to engage policymakers, and how to speak to current legislative issues
- **Rapidly growing movement:** 180+ attendees in 2026 (up from 60 in 2025), reflecting rising engagement and demand for authentic advocacy opportunities



A wide view of a KCDD’s formal 2026 advocacy training led by KCDD’s staff in front of 180 advocates from across Kansas. Advocates are sitting at roundtable listening to information about key policy priorities facing Kansans with I/DD.

# The Power of KCDD's Voice at State Capitol



- 50% of KCDD staff = individuals with I/DD
- Nothing about us without us: testimony is led by people with lived experience on our staff and/or Council



A wide view of a legislative hearing room with warm yellow walls, tall windows, and overhead lights. In the foreground, a man seated in a motorized wheelchair faces a desk with a microphone, appearing to give testimony. He has a backpack attached to the back of his chair. Across the room, a panel of officials sits behind a long desk, listening attentively.



A wide view of a formal legislative hearing room with high ceilings, wood-paneled walls, and large windows. Multiple chandeliers hang overhead, lighting the space. At the front left, a woman stands at a podium speaking into a microphone. Next to her, a young woman seated in a wheelchair faces forward toward a long desk where several officials and staff are seated with laptops and papers.



Questions?

[sara@kcdd.org](mailto:sara@kcdd.org)

[allyson@kcdd.org](mailto:allyson@kcdd.org)



# Supporting the Council to Make the Right Policy Decisions



**2026 DD Council Training and Technical Assistance Institute**

**WV Developmental Disabilities Council**

**May 5, 2026**

# Background

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The Council has had a longstanding informal unwritten process for making public policy decisions.

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The Council voted to formalize this process in October 2025.

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The Council established a Public Policy Committee.



# Key Considerations

- **SUPPORT.** To support Council Members in making decisions on public policy issue.
- **INTERNAL ALIGNMENT.** Ensure decisions are consistent with the Council's mission.
- **TIMING.** Ensure action is taken during a time to maximize outcomes.
- **TRANSPARENCY.** Use a clear, documented decision-making process to build trust and ensure integrity and credibility.
- **SCOPE.** Ensure advocacy and education as the focus.



# Decision Making Process

Define Issue  
and Audience

Mission  
Relevance

Action



# Define Issue and Audience



- What is the issue?
- Is this about an ongoing issue, new issue, or concerns about a future issue?
- Who is the target audience?
- Is this an issue the Council has provided advocacy and education in the past? How long ago? What worked? What did not work?

# Mission Relevance

- Does the issue fit into the Council's mission?
- Does the issue fit into the WVDDC public policy priorities?
- Both questions must be answered "yes."



# Action



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What groups are working in support of the issue?

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What groups are working in opposition to the issue?

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What is the best role for the Council?

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What is the risk of not taking action?

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What tools will work best?

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Who will provide advocacy and education on this issue?

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What does success look like?

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How can we assess progress and adapt as needed?

## Contact:

110 Stockton Street  
Charleston, West Virginia 25387  
Phone: (304) 558-0416

Website: [www.ddc.wv.gov](http://www.ddc.wv.gov)  
General Email: [dhwvddc@wv.gov](mailto:dhwvddc@wv.gov)

