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Communication with U.S. Federal Decision Makers: A Primer with Notes on the Use of Computer Models as a Means of Communication

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Abstract

This document outlines ways to more effectively communicate with U.S. Federal decision makers by outlining the structure, authority, and motivations of various Federal groups, how to find the trusted advisors, and how to structure communication.

All three branches of Federal governments have decision makers engaged in resolving major policy issues. The Legislative Branch (Congress) negotiates the authority and the resources that can be used by the Executive Branch. The Executive Branch has some latitude in implementation and prioritizing resources. The Judicial Branch resolves disputes.

The goal of all decision makers is to choose and implement the option that best fits the needs and wants of the community. However, understanding the risk of technical, political and/or financial infeasibility and possible unintended consequences is extremely difficult.

Primarily, decision makers are supported in their deliberations by trusted advisors who engage in the analysis of options as well as the day-to-day tasks associated with multi-party negotiations. In the best case, the trusted advisors use many sources of information to inform the process including the opinion of experts and if possible predictive analysis from which they can evaluate the projected consequences of their decisions.

The paper covers the following:

- Understanding Executive and Legislative decision makers – What can these decision makers do?
- Finding the target audience – Who are the internal and external trusted advisors?
- Packaging the message – How do we parse and integrate information, and how do we use computer simulation or models in policy communication?

Understanding Executive and Legislative decision makers – What can these decision makers do?

General Characteristics

Government decision makers have several characteristics in common (FCNL, 2006). In general, government decision makers face decisions that are:

- Dynamic
- Prioritized
- Multi-faceted and affect multiple parties

In this context, dynamic means that the conditions under which decisions are made are frequently in flux (Wells, 1996). National elections are held on a two year basis. Congresses last two years. After two years the queue of legislation is erased and must be re-initiated. The budget process is always in some state of development with reprogramming decisions for the current fiscal year, negotiations in Congress and between Congress and the Administration (the portion of the Executive Branch that transitions due to election or appointment) for the upcoming fiscal year and planning within the Executive for out-years happening in parallel. Political appointments for the leadership of agencies change every 4 years, but are in place a maximum of 3 ½ years given the time it takes for Senate Confirmation. Additionally, appointees frequently move before the end of an administration, are promoted, shift between the White House offices and positions within Executive Agencies and Departments and so forth. Presidential priorities may stay relatively fixed over time, but the manner in which they are implemented and the priorities of funding change fairly frequently. Senior government officials (in the Senior Executive Staff) are trained to be flexible and transferable between positions within multiple agencies and have a tendency to be promoted or move as part of career advancement. Congressional Staff who carry the “corporate knowledge” for Congressional offices are young, upwardly mobile and move or are promoted fairly frequently. This list provides a flavor of the changes that can occur. It is not comprehensive. Nevertheless, it is important to understand that any decision maker within this system is sensitized to the changes that have happened around him / her and is trying to anticipate how their decisions will affect or be affected by transitions in the future.

To understand prioritization, one must accept that making decisions involves risk and requires investment of time. Decision makers are judged by their bosses, peers and subordinates based on their decisions. Thus elections for the Legislative Branch, elections for the head of the Executive Branch, and individual careers of staff in either branch are at risk. Thus, decisions, especially if they require a change from an established course or pattern require additional study and ground-truth homework. The time required to fully consider an important decision dictates that few decisions are actually addressed. Thus, there is a filtering of questions, proposals and new ideas into those that will get sufficient attention to come to a decision and those that are “tabled”.

Decisions are always multi-faceted and affect multiple parties. Most individuals approaching a government decision maker have a fairly clear idea of a problem and their selected solution.

Whether knowingly or unknowingly, they do not view the problem and the options for its solution from all possible positions and with knowledge of all the possible ramifications. Some of the ramifications come from competition for funding or competition for attention. With almost all budgets considered as zero-sum games, funding some new program, requires reductions in funding for some existing purpose. Or, a member of Congress may only be able to move a small number of pieces of legislation in a two year period so that advocating for some specific proposal means de-prioritizing other proposals, in potentially un-related areas. Major policies represent a balance between competing interests. Thus, a change in policy, program or regulation changes that balance and affects multiple parties. Decision makers will live with the ramifications of these multi-party impacts.

With these general characteristics framing most decisions, decision makers tend to be:

- Risk averse
- Prefer to address observable issues rather than future possibilities

In this case, risk averse means cautious. Hasty decisions can mean that all the potential ramifications have not been considered. Additionally, in a highly politicized world, bad decisions tend to be broadly publicized and form the basis for political criticism. Consequently, the risk is high and caution wins the day.

Given the need for caution, it is easier for decision makers to act on easily and jointly observed issues (Wells, 1996). If a problem has already occurred, nearly everyone in the decision makers immediate world understands the problem, then discussion of the issue and resolution on some course of action is moderately easy. It is much more difficult to take action on future possibilities. The future is generally different than predicted. We can only outline most likely courses of action. In addition, the future is not here today and occupies less of the decision makers surroundings and priority attention. Thus, an outsider will recognize a tendency to be “reactionary” to events rather than proactive against future issues.

Executive Branch

The specific issues that drive decision makers in various branches and offices within government derive primarily from their responsibilities and the manner in which they sustain their positions.

White House Offices have responsibility to advise the President and under this authority, determine policy, coordinate activities, prioritize the budgets of other Executive agencies, and control official communication between the Executive Agencies and Congress. They rarely have significant funding of their own to allocate to implement government programs. Each office has a set of responsibilities set either by law in the formation of the office or by executive decision. The White House decision makers are exceptionally aware of the impact of national politics on the welfare of the political party in office, chances for re-election and are sensitive about how well aligned the various agency (elements of the Executive Branch) actions are with the President’s policies. They are highly sensitized and thus responsive to changes in national mood, events, and political pressure.

There are approximately 40 offices within the White House. Each has different responsibilities and sensitivities. For example, the Office of Science and Technology Policy is organized into committees staffed by members of various other executive agencies. They review national issues and agency activities related to science, work with commissions and the national academies, and establish policy position recommendations to be provided to the President via his Science Advisor. In limited cases, OSTP can have a strong say relative to integration of cross-agency budgets and program activities. OSTP committees are often used to find common ground across program areas where multiple agencies have responsibility. Thus, OSTP committees can face territorialism or competition for mission space among participants. Decision makers are therefore sensitive to how a policy proposal will affect their agencies mission space, budgets and flexibility.

The Office of Management and Budget is a very powerful segment of the White House. OMB oversees development of the President's budget request to Congress, clears testimony by members of the Executive agencies when they testify before Congress (with the associated control on what is said), and audits the expenditures of agencies and their programs for the Executive. These are very powerful tools and thus OMB represents one of the ways the President can enforce his policies on the Executive Branch agencies. Given this office's key position, every agency is in strong advocacy mode in their interactions with OMB. Consequently, OMB staff are conditioned to be skeptical of claims and to be very cautious. The Executive Branch Agencies receive their authority to act (establish programs) and their capacity to act (funding) from Congress through legislation in conjunction with Presidential approval (sign bills into law). They have the authority to implement programs within the latitude provided by Congress which varies by program based on the legislative "authority" basis of the program. Agencies can implement activities using Federal employees or can pass their funding through to private organizations, states and other groups via contracts, grants or cooperative agreements. The method by which these funds are allocated is also dictated by law. If a grant program is possible, then the agency will develop a mechanism for fairly accepting proposals, judging them and awarding grants. The same is usually true of contracts or cooperative agreements. In every case, the agency is held responsible for the successful use of the program funds and therefore must have some reporting mechanism to track their investments.

Executive agencies can also exercise regulatory authority where they have legal mechanisms for requiring actions and can either exert punishment or withhold rewards from organizations that do not comply. The basic issues are the same. The programs are held accountable for their overall success and therefore need to understand what constitutes success and how it will be measured.

With this in mind, it is essential that anyone working with an Executive Branch agency relative to a given program, understand the legal authority (laws and rulemaking actions) that created, limit, and define success for the program. Program officers must live within these constraints. If a proposal is presented to a program office and it does not meet the goals or procedures of the program, there is no way for the officer to engage successfully. A successful proposal in this case would also need to show how it helps meet the programs goals.

The Executive Branch has dramatically improved its communication with the public through the internet. You can now search for information through well crafted web sites. A good start is the White House web page (www.whitehouse.gov) which lays out the activities of the White House offices as well as providing links to all other Executive Agencies. You can also go directly to the agency web pages (e.g., www.nsf.gov, www.doi.gov, www.fws.gov, www.usgs.gov). With the advent of the 2009 American Recovery and Reinvestment Act, the web site recovery.gov was initiated to allow public tracking of allocation and expenditure of stimulus funding. This represents an expansion of the use of these internet based tools.

Legislative

The Legislative branch of government's overall responsibilities consist of three general categories of action: 1) generating a legal framework for the operations of the executive in the form of authorization of government programs or regulation, 2) funding that regulation, and 3) oversight of the implementation of the programs.

The specific division of these responsibilities, between the two sides of Congress (e.g., Senate confirmation of new Executive Branch appointees or the primary responsibility for formulating spending by the House), are important. However, the two sides of Congress share most responsibilities relatively evenly. Thus the motivation for their work is similar.

Senators and Representatives focus on issues related to, or of great concern to their home state constituents; national and international issues with particular focus on issues related to committee assignments; and re-election. The relative priority of these issues changes frequently and is individual.

The elected official tries to remain connected to his constituency. A key mechanism is through the two-way communication with local press (TV, newspapers and some degree internet based blogs). Most members of Congress have a function in their offices that collect and provide them a daily compendium of this press information. They also send frequent press releases on their activities in Congress, appearances in state, positions on legislation, action on legislation, positions on key issues in the home state and other topics.

Each member of Congress belongs to formal committees and sub-committees. The committees have specific areas of jurisdiction which are rigorously defined and defended. Committees have control of legislation that falls within the boundaries of their jurisdiction as defined by precedent and the Parliamentarian, and consequently represents their areas of control, authority and power.

The committees fall into two general categories – authorization and appropriations. Authorization committees provide instruction to or permission for the Executive Branch agencies to undertake programs or actions. The law specifies the boundaries of actions that can or must be taken. There is no formal requirement that authorization bills be passed on a particular schedule. Appropriations committees provide annual allocations of funding to specific programs or even to specific projects. Congress has the responsibility to pass the annual budget. Consequently, they are responsible to pass appropriations bills.

Both type of committees operate primarily through oversight or legislative hearings and business meetings that include voting sessions. Oversight hearings are used to check progress on a previously authorized program or appropriated funding. Legislative hearings are used to gather information on proposals for changes to or new programs. Business meetings or “mark-ups” are used to vote on legislation, amendments to legislation, political appointee confirmations and to move legislation to full committees or to the floor of the respective side of Congress.

Most members in Congress seek to be on committees that relate in some way to the highest priorities of their constituents. They also seek areas where they have previous experience and personal interests. Consequently, committee assignments and the jurisdiction of the committee tell much about the interests and power base of a member of Congress.

A member’s degree of power on a committee is related to their seniority. Becoming the Chairman (majority party) or ranking member (minority party) allows a degree of control of the agenda of the committee and therefore what legislation will pass and what will be held up or not even considered. It is therefore relatively easy to see who has the most influence over a given government program based on what committee has jurisdiction and who is in the majority and seniority.

Relative to re-election, Senators have 4 years of relative calm with 2 years of electioneering and Representatives are always running for office. The actions of the members of Congress are tightly coupled to the visibility of their actions and the relative immediacy of ramifications. Members of the House are under constant scrutiny. Senators have a degree of calm over the first two Congresses in their six year terms.

With these general considerations in mind, it is important to get to know the detailed priorities and positions of power of the member of Congress you wish to contact. Both the Senate and House have web sites that are maintained and are fairly accurate in representing the formal information on each member. The members also maintain individual web sites that can be accessed through general Congressional sites (www.senate.gov, www.house.gov). The text of introduced legislation and appropriations bills, co-authors, summaries and tracking history through sub-committees, committees, floor action and conferencing between the two sides of congress are available for both the current and several of the previous Congresses through the Library of Congress legislative web page (www.thomas.loc.gov). More detailed information on the history of legislation, analysis of impacts and other related topics is available from the Library of Congress – Congressional Research Service (www.opencrs.cdt.org).

In reviewing this information look for policy statements, press releases, and legislation related to the topics of interest. Be aware of the legislator’s committee positions and what the committee can undertake related to your area of interest. This information should strongly structure both the language you use to present ideas and put limits on the actions you request of the Member of Congress.

Finding the target audience – Who are the internal and external trusted advisors?

With the array of topics and the density of information bombarding decision makers, there must be some mechanism for the decision maker to identify the key information and rational decision options. Thus, decision makers seek individuals and organizations with deep understanding of an issue that can integrate the concerns they have and who they trust. Let's call these "trusted advisors".

If you are interested in influencing a specific area of Federal action, your goal is to work with or become one of these trusted advisors. There are external and internal trusted advisors. The internal advisors are closer to the decision maker and should be the first choice.

Executive Branch

Representatives of the Executive Branch of government are usually more easily approached directly than are members of Congress. To initiate contact, one needs to identify the program office responsible for a given topic or set of Federal actions along with the chief officer of that program. A direct call to that office will usually be screened by an administrative person who will provide you with the name and contact information for the member of their staff responsible for a given Federal program.

Legislative Branch

Members of Congress have personal staffs. The normal order of trust within the staff is the chief of staff, the legislative director, then for specific areas of legislation, the legislative Assistants (or LA's). Legislative Assistants are usually assigned to topic area that correlate to the committees on which the member sits or key areas of constituent interest. The LA maintains an understanding and contact with all the topics of the committee. Committees have similar structures. They are led by a Staff Director and a chief counsel. These are supported by deputy chief counsel and various committee staff with specific legislative areas of responsibility.

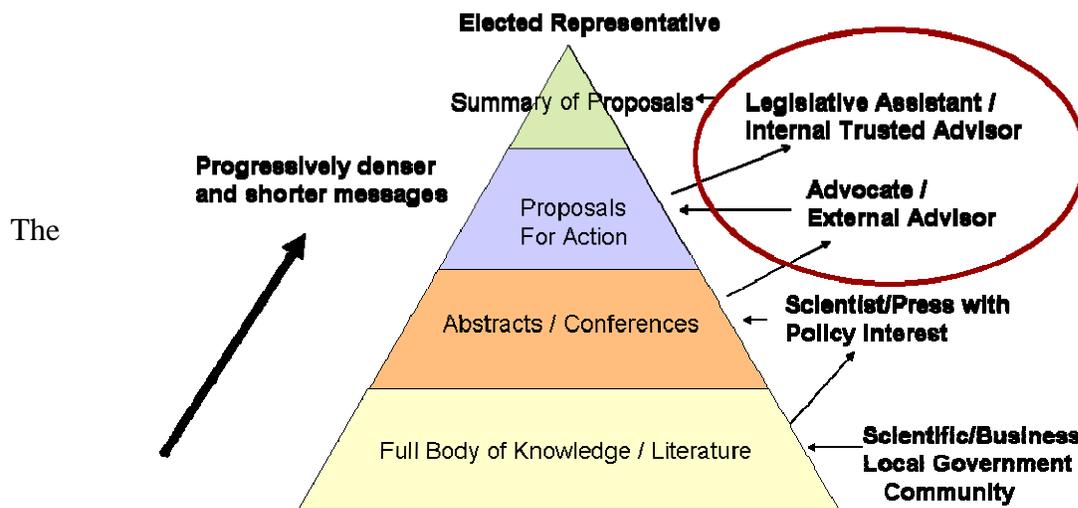
The challenge is getting the attention of these internal trusted advisors. There are two keys to this process. First, we must know the background and areas of responsibility for these individuals. The chief of staff, legislative director, committee staff directors and chief counsels are usually published in "Congressional Guides" available from commercial companies and Capital Hill publications (e.g., Roll Call, www.Congress.org). These individuals are unlikely to take an unsolicited call unless you represent a major organization (national or within the home state). However, you can usually contact and have some degree of communication with the Committee Staffer or personal office Legislative Assistant with responsibility for your topic area. To get the name and contact information for this person, call the main office number for the personal office or committee and ask which staff member deals with your issue. You will normally be provided a name and email address. This then provides your first entry point for submitting information to a Congressional Office and represents the place where you must generate trust and credibility.

Unsolicited information relative to a given piece of legislation or a topic will usually be handled by office staff or interns and provided to the member of Congress as a count of those supported or opposed. This is not the best way to generate a relationship with the office or to work with an in-house trusted advisor.

If you are unable to communicate directly with the Congressional staff, the alternative is to help professional or business organizations to package messages for Congress. Most professional societies, business affiliate organizations, and most think tanks have Congressional outreach or policy committees and organizations. These groups have a degree of trust or standing with various offices and provide an alternative method of communication. Lists of non-government organizations that interact with Congress can be derived from the web (e.g., www.sourcewatch.org).

Packaging the message – How do we parse and integrate information?

Your message or the information you wish to convey to a decision maker needs to be organized or packaged (Fitch and Goldschmidt, 2005) in such a way as to be digestible by the individual with whom you will communicate. A generalized scheme for the information is shown in the following diagram. The basic premise is that the decision maker and his most trusted advisors are positioned near the top of the pyramid. Toward the bottom are those with the most detailed information and understanding. As one progresses from the bottom to the top, there is a summarization process that brings the key messages to the top of the information chain.



scientific, business, education or other communities of practice and knowledge have access to the full literature and experience. However, practitioners of science or engineering may not work to “abstract” or summarize their work and the impact that work has on broader societal issues.

This first compilation or abstraction is sometimes performed by the general press or by industry specific press and news organizations. Alternatively, the policy section of major scientific journals may include material on the general state of knowledge and its impact on future science and society. Additionally, the abstracted information may be coalesced in conferences, summary articles and so forth.

The external advisors (organizations or individuals) must then take the responsibility to look across these summaries of the impact on society and re-package the information to include options for action (these can be thought of as policy options). If the information is filtered and presented to support a given policy position, then the work should be considered advocacy. Formal lobbying is a form of or a subset of advocacy (but not discussed here in detail). The process of policy analysis is a science unto itself. The National Academy of Science engages in the unbiased form of policy analysis when it accepts the assignment from a government agency or Congress to review specific bodies of scientific knowledge.

Finally, the internal trusted advisors will evaluate the options for action (sometimes presented as proposals for action by advocacy groups), evaluate the political and Congressional district specific ramifications and make a recommendation to the respective member of Congress.

As should be expected the information presented at each of these progressively higher steps is progressively more condensed and succinct.

The initial body of knowledge may fill libraries. The first synopsis of the body of science may be a detailed report or a conference proceeding. The work by a policy analysis group may also be a detailed report but it will be prefaced by an executive summary that gets quickly to the point on the actions that are recommended. The briefing of this material by an external advisor to an internal advisor needs to be very short (with additional information available as requested). Short in this case may mean one page with the key points, proposals (sometimes referred to as the “ask”) where it is the first thing understood. The internal advisors information to the decision maker may be as short as an “elevator speech” of 1 minute with a few key points and a recommendation.

When this process of packaging works well, the information reaching the decision maker is clear enough for them to take the appropriate action, backed by strong, clear data and analysis; and conveyed through each step of the process of synthesis and summarization by a trusted source (individual or group).

The Use of Computer Simulation or Models in Policy Communication

Computer models are by nature a means of synthesizing a body of scientific knowledge. Their use in communicating with decision makers, however, must be tailored to the general rules described above. For example, a complex climate change model needs to be accurate and descriptive for the general technical audience. The summary of the results is useful for the press, the public and the external advisors. However, the results of these models need to be coupled with potential societal impacts and potential options for government action to be useful to internal advisors.

Within this context modeling can play two important roles in the packaging of a message delivered to a decision maker. The first and traditional role of modeling is in the formulation of the message itself. Specifically, modeling is often called upon to explore alternative modes of action and to help substantiate the technical and financial feasibility of the proposed action. The second and less well appreciated role is establishing credibility and consensus in the delivered message. Credibility and consensus are key metrics in establishing the political feasibility of any action. The credibility and consensus “packaging” are realized largely through the modeling process rather than the model itself.

The role of modeling in formulating the message is largely driven by the fact that there are rarely simple, obvious solutions to policy issues. For example, water resource management decisions by their very nature require consideration of the delicate balance among the physical, social and legal systems at play within a watershed or groundwater basin. Deliberation based solely on human rationality tends toward short-sighted, static and linear solutions defended on the basis of conviction and perception (Bakken et al. 1994; Ehrlich 2000). As such, models are needed to escape the confines of our bounded rationality—tools that allow exploration of a broader decision space and to comprehend the non-linear dynamics, feedback and time delay that are inherent to natural and human systems. The term model in this context can take on a variety of forms, ranging from simple diagrams that show the progression of cause and effect to sophisticated numerical models.

As there are generally many conflicting views and values associated with any policy decision, the message delivered to a decision-maker is made more effective when it consists of multiple courses of action including an analysis of the technical and financial consequences and tradeoffs associated with each. Decision support systems (DSS) provide a valuable framework with which to perform such “what-if” analysis. A DSS generally involves the integration of scientific models with a user interface, database and analysis tools, combined within an over arching system network architecture. The DSS aids in packaging the message by simply making it easier to perform multiple simulations to explore different courses of action. As the sophistication of the DSS improves it can aid in the visualization of simulation results, automate the search for a preferred alternative based on a given objective function, and facilitate the organization and comparison of multiple decision metrics from competing simulations (e.g., multi-criteria analysis).

The process by which models are developed and exercised represents another valuable vehicle for packaging the message delivered to a decision maker. The process by which modeling is pursued can have a significant effect on the level of support that stakeholders outside the “modeling team” have for the delivered message. Decision makers dislike playing the role of judge; particularly, where they are forced to choose between conflicted parties. Proposed policies that engender broad support provide a much more palatable context for decision makers to act. In this way the modeling process can help establish the political feasibility for a particular action thus addressing the third decision metric for a decision maker (i.e., technical, financial, and political feasibility).

By process we mean the degree with which stakeholders and decision makers engage with the modeling team to develop the message. Engagement can occur at various points, starting at the very beginning with model formulation and extending to the point where competing alternatives are identified and simulated. Participant engagement can be indirect where experts are responsible for all aspects of modeling as well as manipulating and running planning scenarios requested by the team. Alternatively, the modeling process can be designed for direct interaction where participants are able to define cause and effect relations, supply data, review the model and run planning scenarios themselves. While variously named, mediated modeling, group modeling, cooperative modeling, shared vision planning, or computer-mediated collaborative decision making (e.g., Tidwell and van den Brink, 2008) are all processes aimed at enhancing stakeholder and decision maker involvement in the modeling process.

One advantage that a collaborative modeling process brings to the message is it helps connect the decision process with science. Specifically, modeling forces participants to confront facts. “Science has developed specific methods and peer review processes to maintain as objective a view as possible, but in other environments this conscious effort is often lacking” (van den Belt 2004). Additionally, models provide a uniform basis for comparing competing alternatives and assessing tradeoffs.

The process of jointly developing and exercising a model also helps the group to better appreciate system complexities and cause and effect relations (Vennix et al. 1997). Such education toward a common understanding improves the chance that results from the collaborative effort will be implemented in decision-making (Vennix 1996, Rouwette et al. 2002, van den Belt 2004). Participant values and preferences become better defined, while knowledge levels and consensus on mitigating approaches improve (Rouwette et al. 2002, van den Belt 2004). Modeling conducted in a cooperative context provides value by way of structuring group thinking and dialogue, ultimately leading to group learning (van den Belt 2004). Maybe most importantly, an open modeling and decision process leads to greater transparency.

If improperly managed, open modeling processes can lead to problems. One argument cites the opportunity for special interest groups to gain disproportionate influence over the decision process (Coglianese 1999; Kenney 2000). Lord (1986) and Ingram and Schneider (1998) recognize that value disagreements are often masked by factual disputes in public debate. The factual disputes then become the focus of the process and the situation of adversarial science or “dueling experts” arises. Finally, collaborative processes are blamed for taking longer and costing more to reach a decision, although this point is questionable if the issue results in litigation.

How to Be Effective in Conveying the Message

There are any number of methods for getting a message to a decision maker. However, there are a few that fit the role of scientists well:

- Direct communication with internal trusted advisors – Many members of Congress view scientists differently than members of the general public. In particular, those who have studied

specific technical areas, live in the member's district and have credibility through their university or other organizational affiliations, can get the attention of a given Congressional office. The most effective course then is to acquire the contact information for the Congressional Legislative Aids and call or write to them directly. Given the fact that few Congressional issues are resolved in a single action, developing a line of open communication is important so that information can be shared iteratively.

- Communication through the press – Most general press outlets (TV, newspapers) have science editors and reporters. Establishing a relationship with the reporter by providing them with relevant information, being responsive when they seek information, and being accurate and unbiased, is critical. Then, specific messages can be conveyed through the creation of press worthy events (dedications, ground breakings, release of critical reports), well tailored press information (press packages) on your message, and unsolicited communication with the reporters or editorial boards on issues you would hope they will cover.
- Alignment with existing institutions with standing – Most scientists or engineers belong to professional associations, work for companies or universities, or are affiliated with community groups, student unions, and environmental organizations that have standing in their respective communities. These also have standing with decision makers. These organizations are likely to have regular and even frequent interaction with Executive or Legislative decision makers. Engagement with these groups can be tailored to help them understand and carry ideas to decision makers.
- Work for Congress or the Executive – The most effective way to convey a scientific or engineering related message to key governmental decision makers is to work for them directly. The number of individuals with science or engineering training who work with or for Congress is growing. Additionally, the American Association for the Advancement of Science provides a conduit for multiple professional organizations to provide short term (usually 1 year) fellowships for work with Congress or Executive Agencies. Approximately 100 fellows (both AAAS and Affiliated organizations) serve each year.

Summary

In short, communication with decision makers, like communication with any audience, requires a few key elements. One must understand the decision makers world including their primary motivation and the range of actions they can take. There is no use in engaging a decision maker in an area where they cannot take action. Additionally, in the complex world of the U.S. Congress and the senior ranks of the Executive Branch, decision makers are bombarded with information. Therefore, they rely on trusted advisors to package information for them, being aware of and assessing the credibility of their recommendations. Finally, interacting with these trusted advisors requires packaging the information in a form, at a level of detail and with the right components (i.e., recommendations for action) based on the advisor's position. Computer tools can be used in this sequence, but they also must be tailored to the level of detail appropriate to the trusted advisors position, time and background. Modeling and simulation tools, such as system dynamics based models (Tidwell and van den Brink, 2008), have been used to work with trusted advisors in packaging normally over-complex information with

potential decisions. Finally, to make the engagement effective, there are several ways to approach trusted advisors including direct identification and communication, working through the press, working through professional and other organizations and seeking to be the internal trusted advisor through employment or fellowships.

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