

ELEVATE THE DEBATE

A MULTILAYERED APPROACH TO
COMMUNICATING
YOUR RESEARCH

EDITED BY
JONATHAN A. SCHWABISH



“Schwabish and team are master communicators! And *Elevate the Debate* masterfully explains how to bring your scholarship and data-driven research out of the library, off the page, and into the eyes and minds of those who can put it to good use.”

—David Autor, Ford Professor of Economics,
Massachusetts Institute of Technology

“Being an expert is both a privilege and a responsibility. So often researchers struggle to clearly frame their work in a way a larger audience can appreciate. *Elevate the Debate* lays out easy-to-follow steps that will help the wonkiest of wonks break down their research and clearly explain why their work matters. If you wish more people could appreciate why your work is important, check this book out.”

—Dan Gorenstein, host and executive producer of *Tradeoffs*,
a health policy podcast

“*Elevate the Debate* is the scholar’s handbook to bridging the divide with policymakers and making a real impact with one’s research. The research report is yesterday’s tool for dissemination; the infographic is today’s. The Urban Institute team clearly and artfully guides academics in identifying their audiences and visualizing results in new, more media-friendly ways that hold great promise for improving evidence-based policy and practice.”

—Carolyn Heinrich, Patricia and Rodes Hart Professor of Public
Policy, Education and Economics, Vanderbilt University

“Scholars spend years learning how to conduct research but rarely are taught to convey insights effectively. This book offers a thoughtful and accessible way to fill that gap by helping researchers to identify an audience, to use more than one medium, and to tailor content, visuals, and tone to broaden their reach.”

—Ellen Meara, Professor of Health Economics and Policy,
Department of Health Policy and Management,
Harvard T.H. Chan School of Public Health

“In an age of increasing disinformation and noise, it’s crucial that scientists, researchers, and educators of all types get their message out with simplicity and clarity. Evidence-based thinking and communicating have never been more important than they are today. This may be the most important book you read this year!”

—Garr Reynolds, author of *Presentation Zen* and
Professor of Management at Kansai Gaidai University

“Data without communication is just data. This essential guide shows you how to transform those numbers into something real and vital that can have true impact. If you want to change the world with data, this guide is a great place to start.”

—Simon Rogers, Google

“At a time when the world struggles to separate fact from fiction in our media and information, there are few more important endeavors than guiding researchers and scholars in disseminating their work. This exceptional volume from the Urban Institute is an essential and timely resource for doing just that. Here’s hoping it is widely read and absorbed!”

—Jimmy Soni, award-winning author of *A Mind at Play:
How Claude Shannon Invented the Information Age*

“This book is the essential how-to guide for researchers and analysts who intend to be relevant. Getting your message into the right hands doesn’t happen by accident!”

—Tom Terry, CEO of the Terry Group

“*Elevate the Debate* is a fabulous new book that offers to teach researchers how to communicate our work to get attention from multiple audiences. This volume takes the importance of a good presentation as a start and goes on to help researchers and analysts to communicate data, research, and analysis to different audiences. It is accessible, clearly written, and a very important tool to increase the use of our work to improve policy formation. I hope it is widely read and followed.”

—Barbara L. Wolfe, Richard A. Easterlin Professor of Economics,
Population Health Sciences, and Public Affairs,
University of Wisconsin–Madison

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A Multilayered Approach to
Communicating Your Research

Edited by
Jonathan Schwabish

WILEY

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Contents

	Acknowledgments	ix
	Preface	xi
Chapter 1	Why Research Needs a Big Audience	1
	Now more than ever, experts need to go further to bring their evidence-based insights to decisionmakers and influencers.	
	<i>Case Study: Creating a range of products to reach different audiences</i>	
Chapter 2	Developing an Audience Outreach Strategy	15
	One audience may need a nuanced, thorough analysis of the data and methods; another may need the punchline; and another the most important, bottom-line numbers or facts.	
	<i>Case Study: Targeting your outreach efforts to different audiences</i>	
Chapter 3	An Introduction to Visualizing Your Research	37
	Be purposeful about what you include in your graphs and charts so they best serve the needs of your reader and the message you want to convey.	
	<i>Case Study: Readers devour an easily digestible data visualization</i>	

Chapter 4	Better Presentations: More Effective Speaking	67
	A presentation is a fundamentally different form of communication than a written report.	
	Case Study: <i>Using the power of storytelling to communicate your message</i>	
Chapter 5	How to Blog about Your Findings	101
	By distilling and repackaging your message, you can make that work more appealing to and digestible for broader audiences.	
	Case Study: <i>Writing timely and accessible blog posts</i>	
Chapter 6	Working with the Media to Increase Your Impact	121
	Make an interview more than a one-time event; use it to cultivate a relationship with the media so you can be a resource in the future.	
	Case Study: <i>Quick responses to policy proposals pay off for elite media cultivation</i>	
Chapter 7	Social Media Can Build Audiences That Matter	147
	Social media platforms can give you the opportunity to connect and converse with new and influential audiences around your research in ways that are both intimate and public.	
	Case Study: <i>Leveraging Twitter to benefit your research</i>	
Chapter 8	Putting It All Together to Make a Difference	175
	If you don't have a plan or a tangible impact in mind, then you risk your work going unnoticed by the people best positioned to act on it.	
	Case Study: <i>Developing structures and processes for a robust communications team</i>	
	Bibliography	195
	About the Contributors	203
	Index	207

Acknowledgments

The chapters in this book were developed from a series of workshops that the Urban Institute Communications Department conducted between 2016 and 2019. Workshop participants hailed from diverse fields: housing, international development, social work, labor economics, healthcare, and more. Feedback was unanimously positive, and we were inspired to empower more researchers by putting those lessons in words.

We are indebted to the researchers at the Urban Institute whose dedication to their scholarship and their collaborative spirit has helped make Urban a trusted resource for thought leaders, academics, practitioners, journalists, and policymakers. We also thank our current and former Urban colleagues who supported this project directly: Rob Abare, Fiona Blackshaw, Ben Chartoff, Matt Chingos, Mary Cunningham, Allison Feldman, Dan Fowler, Martha Galvez, Heather Hahn, Rachel Kenney, Arlene Corbin Lewis, Jeffrey Lin, Rhiannon Newman, Sheryl Pardo, Archana Pyati, Brittney Spinner, Jerry Ta, Alex Tilsley, John Wehmann, and Sarita Williams.

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The most important contribution to this book comes from the authors, all of whom are experts in their fields of communicating research and analysis in different ways across different mediums and platforms. They all share a belief in the importance of using data, facts, and research to help improve public policy, communities, and lives.

—Jonathan Schwabish

Preface

The Urban Institute is a nonprofit research institution located in Washington, DC. It was founded in 1968 to study the nation's urban problems and evaluate the Great Society initiatives of the Lyndon B. Johnson administration. Today, Urban comprises more than 500 social scientists, economists, mathematicians, demographers, data scientists, policy experts, and communicators. At our core, we believe good decisions are shaped by facts, rather than ideology, have the power to improve public policy and practice, strengthen communities, redirect the way businesses think and operate, and transform people's lives for the better. Our research is not done for the sake of research or for a handful of other scholars; it is conducted to serve as a catalyst for change in perception, thought, and action.

Urban's Communication Department began to grow rapidly in 2013, evolving to better help Urban connect with other researchers, policymakers, practitioners, the public, and the press. With a refreshed brand identity and transformed digital presence, Urban began pioneering new ways to bring research to life. Today, a modernized approach and institute serves as a model for other nonprofits and organizations.

As Urban's communication efforts began to bear fruit, the team began to host trainings—internally and externally—on a range of topics including media relations, blogging, social media, data visualization, presentation skills, and translating research for policymakers.

At the request of a major foundation, we rolled all these together into a daylong session to equip researchers with the tools they need. Today, we offer these personalized trainings to a range of academic researchers and organizations seeking more meaningful impact for their important work. In this book, we capture our overviews, tips, and tactics so they can be yours to remember and apply.

When Bridget Lowell, Urban's Chief Communications Officer kicks off our Research to Policy Boot Camp, she starts with a simple question: "How many of you have felt frustrated when working with a reporter or a marketing communications staffer?"

Immediately, almost all hands go up

The second question she asks is, "How many times have you invested significant time and energy to painstakingly help nonexperts understand your issue, only to have them publish stories in which they get it all wrong?"

Most hands stay up

Whether at an academic institution, nonprofit organization, or government agency, researchers far too often feel that their work is ignored or misrepresented. Many feel that doing a better job communicating their work is outside their skill set or not worth their time. At Urban, we feel just the opposite. We feel that people who have dedicated their time to conduct objective, rigorous research can also effectively communicate that work to whatever audience they want to reach. The same communications toolkit we follow can be applied by any organization that seeks to share research-based information and rally audiences to thoughtfully consider a point of debate and drive the correct decision-making to solve a problem. In that way, the techniques we have developed at Urban may be used by researchers and thought leaders of all types, *elevating the debate* inside and outside their organizations.

It takes time. It takes effort. It takes skill. But it can be done, and this book will help you do so. Our goal in this book is to take you through the journey of effectively communicating your work to your audience across eight different subject areas. Together, they will help you find and reach your audience. There are a variety of payoffs to doing so: reaching a broader audience; having an impact on policy; finding new collaborators; finding new data; and finding new funders, to name just a few.

This book is organized in eight chapters to help you on your way to better research communication.

1. **Introduction.** How do you identify your target audience, and how do you argue the importance of better communication? Bridget Lowell lays out the case for why better communication is imperative to prove that facts matter.
2. **Audience outreach.** Who are the policymakers, decision-makers, and influencers who can help circulate your work or connect you with other potential collaborators, groups, and funders? Amy Elsbree and Amy Peake show you how to be deliberate about who you are trying to reach and how you will reach them.
3. **Data visualization.** How do you create visuals and graphs that do a better job communicating your findings? Jonathan Schwabish discusses different graph types and some of the best practices to visualize your data.
4. **Presentations.** What are the strategies and approaches to giving presentations that engage an audience and help them use your research? In this chapter, Schwabish discusses how to plan, design, and deliver an effective presentation.
5. **Bloggng.** How do you get your message into the hands of those who can use it to make better decisions? In this chapter, Nicole Levins shows why blogging matters for communicating research, and what you need to know to get started.
6. **Media relations.** How can you talk to reporters about your work, engage them, and have your work mentioned and cited in

newspapers, blogs, radio, and podcasts? In this chapter, Stu Kantor gives you specific strategies to approach your next interview with calm and confidence.

7. **Social media.** What are the strategies and best practices to use social media platforms like Twitter and Facebook to connect and converse with new and influential audiences? David Connell provides you with the techniques you need to engage on social media platforms in a way that feels comfortable and productive, and does not distract from the important work you're already doing.
8. **Impact plan.** With all this information and tools now at your fingertips, how do you pull it all together? In this final chapter, Kate Villarreal shows you how to build an overarching communications strategy that weaves together the tactics and products into a single, focused plan.

Together, these chapters will provide you with the basic, practical strategies to be your own communications manager. See our webpage for more information and downloadable resources and worksheets: <https://www.urban.org/ElevatetheDebateBook>.

As a team, we are committed to helping researchers and other data-driven knowledge seekers do a better job communicating their research and reaching their desired audiences. We are sharing our tools, techniques, and strategies because we believe that more and better communication of important research can lead to better outcomes.

We hope President Lyndon Johnson would be proud of the independent institute he commissioned in 1968, one that promised “to give us the power through knowledge to help solve the problem that weighs heavily on the hearts and minds of all of us—the problem of the American city and its people.” He hoped the Urban Institute would fill a real need by “bridging the gulf between the lonely scholar in search of truth and the decision-maker in search of progress.” We hope this book will advance today’s scholars and decisionmakers on that journey.

Why Research Needs a Big Audience

Bridget Lowell

If you're like most researchers, you question the value of communicating your work to a broader audience. It's fair to be skeptical. Maybe it seems trivial. Maybe you've been burned by a reporter who completely misunderstood your findings, despite your having spent an hour on the phone explaining them. Maybe your results got distorted by a well-meaning blogger who doesn't quite understand what a confidence interval is. Maybe your peers or department chair sneered at you for blogging or tweeting, saying your time was better spent writing for academic journals.

I get it. I've heard all these complaints, and more. My goal—and our goal throughout this book—is to demonstrate that being a successful scholar today requires that you share your insights *beyond* the academic community. After all, what value is your research if it doesn't connect to the very world it is trying to influence and change? Great research—whether it comes from the academic community, non-profit research organizations, or thought leaders in business and

elsewhere—needs a *plan* to find different and wider audiences that can expand its impact.

We will arm you with the necessary tools to translate your work on your own terms, telling the reader and user how to interpret your findings. After reading this book, you will be inspired and equipped to use traditional and digital media to your advantage, and you will never sneer—or be sneered at—again for communicating your work to the world.

We wrote this guide for the converted and the skeptics because, frankly, the research community can no longer afford not to participate in the conversation. Evidence-based thinking needs to push its way deeper into all institutions and organizations so that insight and keen observation have legs to stand on everywhere. Your goal should be to take the results of your research into all conversations and ultimately drive sound critical thinking, decision-making, and problem-solving.

It's up to you to prove that facts matter. And to make them count.

The environment for facts, science, and information began a radical shift even before “alternative facts” and “fake news” entered our lexicon. Respect for institutions—the ones that have typically been the sources for widely agreed-upon facts—has been eroding for years. A March 2019 poll by the Pew Research Center found that “majorities of Americans had not too much or no confidence in the news media, business leaders or elected officials to act in the public interest.” Other surveys also find declining trust in business, media, government, and nongovernment organizations (NGOs) globally and in the United States. A June 2018 Gallup poll shows public confidence is lowest in Congress and media organizations, but “no institution has shown a larger drop in confidence over the past three years than higher education.” Gallup found the decline in trust in academia was steepest among self-identified Republicans, but Democrats and independents expressed less confidence as well.

This is perhaps best summarized by what former United Kingdom Justice Secretary Michael Gove said in the fallout after the Brexit

vote in the United Kingdom: “People in this country have had enough of experts.”

Federally elected officials, themselves often ranked among the least-trusted, are hardly embracing evidence as they develop and vote on legislation. In 2017, some members of Congress went so far as to stop relying on the objective, nonpartisan legislative analyses of the Congressional Budget Office, which had long been upheld as the definitive source for budget and economic estimates.

So, the bad news is that the stakes are high, facts are endangered, and people conducting serious research and analysis can't afford to sit on the sidelines. To ensure that research is factored into today's most important decisions, researchers must engage in today's fast-evolving policy ecosystem.

The good news is that it's never been easier to do so.

Never has it been easier for researchers to directly set the terms of debate. Never have scholars had this much control over how their evidence is presented and disseminated. Never have people been so well equipped to democratize data and put information directly into users' hands for thought and consideration, and possible action around evidence-based thinking.

Today's consumers of information have access, transparency, and the opportunity to personalize information and understand what it means for their own communities like never before. This is how we will demonstrate as a research community that facts do indeed matter, and they matter more than ever.

Be Strategic: Set Goals for Impact

Too many scholars and analysts write a report, memo, or blog post and expect that by virtue of its quality alone, it will find an audience and generate positive impact. But that's not how it works in today's crowded landscape of content, research, and data. Impact is earned

not through dissemination at the report's conclusion, but through intention and careful planning at its inception. Ideally, your outreach plan should coincide with your research design. You should start by asking, *What questions am I answering, and what problems am I solving with this research? For whom and to what end?*

Effective communications and outreach strategies always start with questions, not findings. Questions such as: Who can benefit from my research? How might it improve their decisions? How does my audience consume information, and how can I present my findings in a way that works for them?

Meet People Where They Are

In this book, our team provides you with the tools and tactics to get evidence directly into the hands of people who need it—whether they know it or not.

The first step is to define and understand your audience, then adjust your product to your audience's needs. Your audience should never be “the general public,” a meaningless description reviled by marketers. Your audience is the consumer of your work: the individual empowered to take action upon engaging with it. A fellow scholar at a university might be eager to dig into your 150-page report, but a staffer on Capitol Hill or a busy CEO might only have time for the topline findings during her morning commute. If your goal is to reach all these various audiences, you will need specific communication products tailored differently for each.

Notice this isn't “dumbing it down”—that's an insult to the sophisticated, substantive experts who are both seeking and communicating evidence-based insights. This is about clarifying, simplifying, and leading with your insights while grounding them in evidence. Then make sure the data and details are available for everyone who wants to dig deeper.

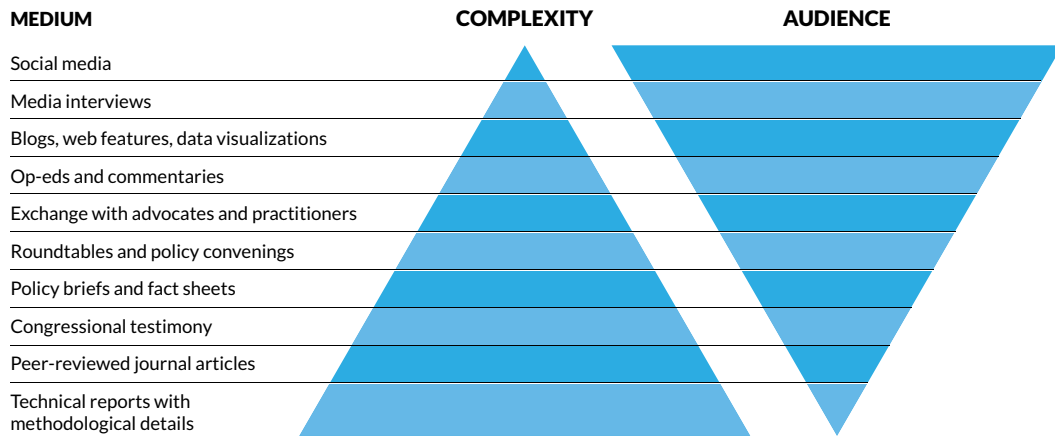
Defining your audience is the first step to translating your research and then letting the conclusions from your analysis show the answers to critical questions.

The Pyramid Philosophy

There are a myriad ways to communicate your research: long reports, short briefs, interviews, blog posts, social media posts, presentations, and more. Your content may not be appropriate for all approaches, nor will every audience respond to each of them. It's useful to think of these different output types not as a box of options, but as a hierarchy. You are not necessarily pitting one audience against another or trading off sophistication for simplification. Rather, you are communicating your work in a multi-layered approach.

We like to think about communicating research using two mirroring pyramids, shown in the following graphic. On the one side is the *Complexity* pyramid. This is where we start this multilayered approach: At the bottom is the foundation of rigorously conducted research, typically a dense, technical report like a white paper or working paper. We then work our way up the pyramid—next comes the peer-reviewed journal article, which may strip out some of the working paper's denser analysis and exposition. Then comes the Congressional or expert testimony where your expertise is most important and is embedded within the written document. Further up the pyramid we find less technical and more accessible products such as fact sheets, briefings, blog posts, and media interviews; at the very top are social media posts.

We pair this *Complexity* pyramid with another pyramid that shows the size of the *Audience*. It's not surprising that only a few people are reading the working paper, and only a few more are reading the journal article. The audience for these products is small: The reader must make it through dozens of pages on methodology, literature review, and analysis across dozens or even hundreds of pages of formulas and tables before getting to the findings. Not many have the expertise to glean the insights that the author intends. But more people are reading briefs and fact sheets, and possibly many more are reading op-eds, commentaries, and blog posts. And possibly hundreds, maybe thousands, are reading that tweet or post on Facebook.



Here's the key: *Every product on the Complexity pyramid links to one below it, grounded in in-depth, sophisticated analysis.* Every blog post links to underlying evidence and a report. Every web feature includes the option to download a dataset or report. Every tweet finds its way back to a more in-depth analysis that provides evidence to support the claim made at each level of the pyramid. The data are available for the user who wants to dig deeper. Evidence is as deep—or deeper—than the question planted, and then answered in detail.

Be Your Own Translator

Many scholars and researchers consider public education their personal mission. Generous with their time, they go to great lengths to give people comprehensive explanations about their data and their research. Understandably, they get frustrated when their work is described inaccurately—by managers or reporters, panel moderators, or even colleagues. They assume the person didn't understand, missed the point, or doesn't care. They blame the *recipient* for their lack of sophistication or short attention span.

But that misunderstanding is, more often than not, the fault of the researcher who has not thought hard enough about how to explain his work. You may be an expert in education policy or international trade, but if you can't explain your work so your audience, reader, or reporter can understand it, it will go nowhere. That challenge is your

burden to bear, so embrace it—and with a little extra effort, thought, and care, it will pay dividends.

We have limited recall. As developmental molecular biologist John Medina writes in his book *Brain Rules*, our brains can only hold about seven pieces of information for less than 30 seconds. Extending that memory requires consistently re-exposing yourself to the information. This doesn't seem unreasonable: Think back to the last presentation you attended or journal article you read. How much do you remember? Perhaps two or three takeaways stuck with you—if the presentation was very well done or the article was clearly written. Perhaps not even that many.

Never go into a discussion without first articulating exactly the two or three points you want your reader or listener to remember. Force yourself to go through the clichéd-but-valuable mental exercise of summarizing or explaining your research to your parents, your neighbor, your teenager, or another interested nonexpert.

Here are some other questions to help you formulate your takeaways:

- What are the two or three most interesting findings from your research?
- What surprised you?
- Which statistics, percentages, or facts are particularly noteworthy?
- What are the policy implications of your research?
- What challenges did you face while conducting the research?
- Why is your research so important?

Put yourself directly in the role of your user. If you were writing the article for the *New York Times*, how would you write the headline? What would be your lead paragraph? How would you be quoted? What would be your tweet?

By putting yourself in the position of the reporter, you can be more attuned to what it is they need from your research and what they need from your explanation. How can your work help them make