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at 2 p.m.

Sharing Knowledge with the Advisors of Policy Makers A Couple of Myths, a Couple of Tips

Webinar | December 13, 2016

Florence Morestin
National Collaborating Centre
for Healthy Public Policy



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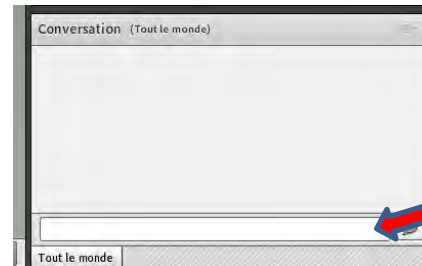
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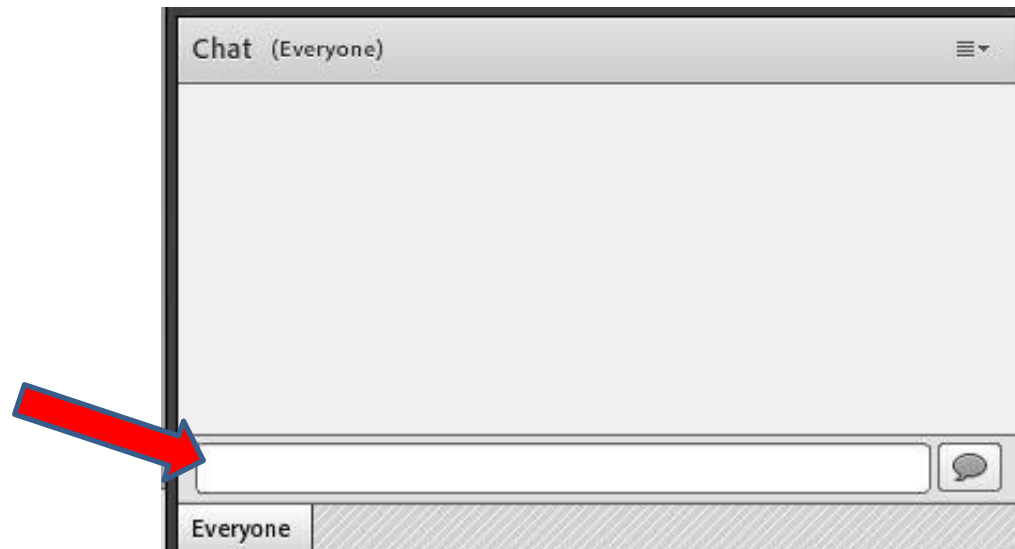
Talk to you soon!



If you have any technical difficulties, write to Mylène Maguire

To ask questions during the presentation

Please use the chatbox at any time.



Please note that we are recording this webinar, including the chat, and we will be posting this on the NCHPP's website.

Presenter

Florence Morestin

Research Officer (NCCHPP)



Assisted by:

Mylène Maguire (NCCHPP): organization of the webinar and technical support

Michael Keeling (NCCHPP): help with the chat



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National Collaborating Centre for Healthy Public Policy (NCCHPP)

Our mandate

- Support public health actors in their efforts to promote healthy public policies

Our areas of expertise

- The effects of public policies on health
- Generating and using knowledge about policies
- Intersectoral actors and mechanisms
- Strategies to influence policy making



Declaration of real or potential conflicts of interest

Presenter: Florence Morestin



I have no real or potential conflict of interest related to the material that is being presented today.



Goals

This webinar will help you to:

- Distinguish between various **types of advisors** of policy makers
- Assess how **relevant** it might be to approach these advisors
- Refine your **strategies for interacting** with advisors



Which policy makers, in which government structures?

Ministerial departments

- Ministers

Legislative assemblies / Parliament

- Elected members
- Senators

Municipal governments

- Mayors
- Municipal councillors

Provincial – territorial or federal levels of government



Which advisors, exactly?

- Persons whose **professional role**, **within a government structure**, is to provide **policy** advice to the policy maker(s)
 - Including indirectly: by producing analyses that other persons will present to policy makers
- Not considered here:

Other professionals



Advisors based outside of government structures

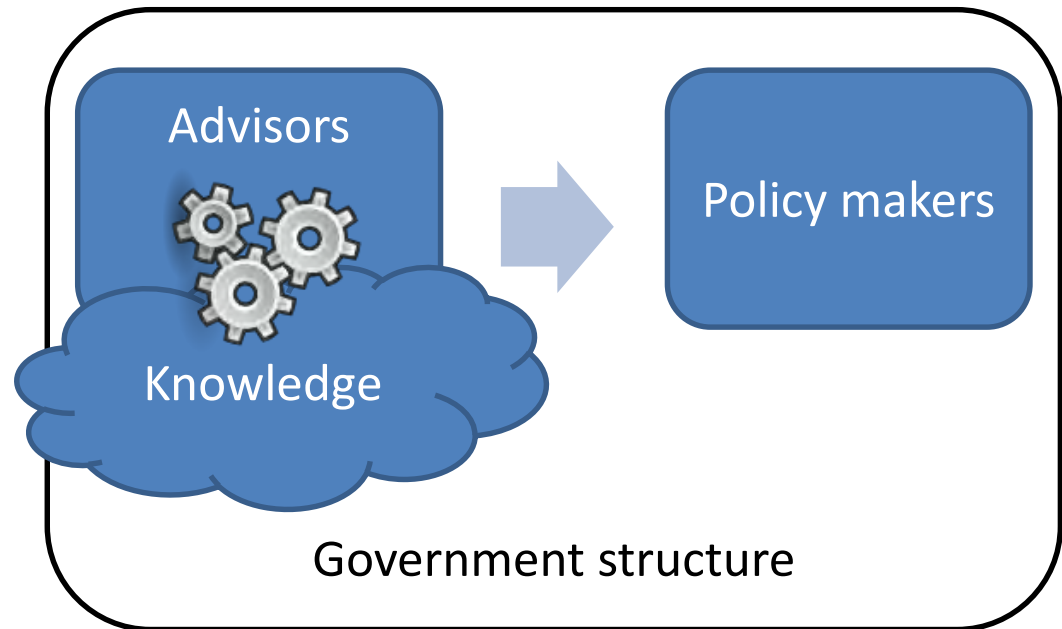


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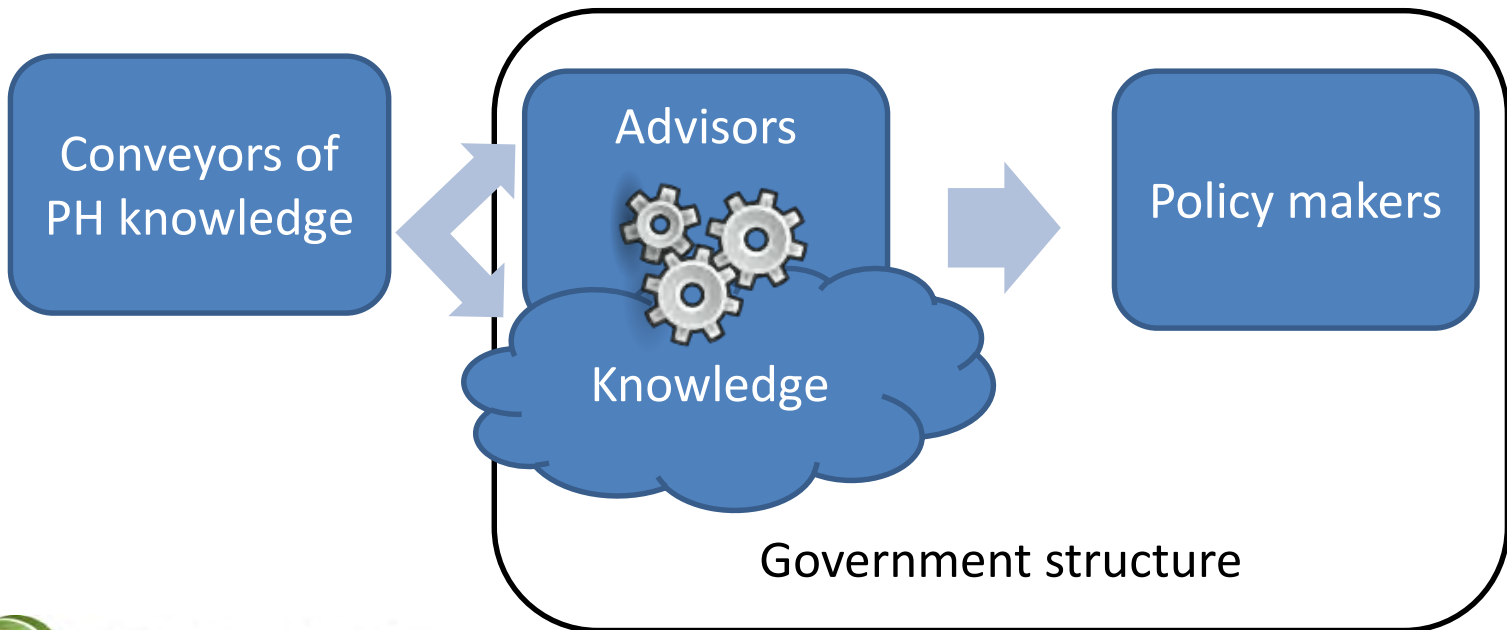
And what about the knowledge?

- Providing policy advice involves processing various types of knowledge
- Policy makers do not usually do this processing



And what about the knowledge? (2)

- Providing policy advice involves processing various types of knowledge
- Policy makers do not usually do this processing
- Public health knowledge: shared in the hope of promoting healthier public policy (PP)



Sources of the information presented today

Ministerial
departments

Legislative
assemblies /
Parliament

Municipal
governments

Literature review:

- 2000-2014
- Western countries
- 70 documents

Interactions with PH **researchers**



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- 2000-2014
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- 70 documents

Interactions with PH **researchers**

Publications early in 2017

Today: highlights from the work

Interviews:

- Fall 2016
- Canada
- 5 public servants:
 - 8 municipalities
(Population 15,400 to 1.65 million)
 - Planning / Social devt.
/ Parks & recreation

Interactions with PH
professionals



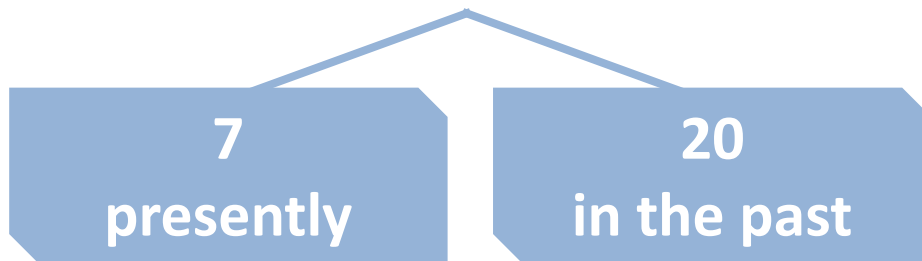
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You may be another source of information

- Variations from one context to another
- Gaps in the data
- Share your experience:
 - Of interacting with advisors
 - As an advisor

Poll in the registration form:




WHO ARE THESE ADVISORS OF POLICY MAKERS?



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Myth: Them and us



Terra incognita - Photographer: Mon Œil

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“Them” and “us”: we’re not so different

Sometimes, they face the same **situations** as we do

Example: Difficulty approaching a **structure that is less familiar**

Municipal public servant (social development), interview:

“The reform [of the public health system] really shook us up. All the relationships that had been established over the years have been disrupted [...] There has been a reshuffling of responsibilities, and because of this, we’ve just lost five years, at least, before relationships can be rebuilt.”



“Them” and “us”: we’re not so different (2)

Sometimes, **profiles** are quite similar

Hallmark of PH knowledge: **connection with research**

- Departmental public servants (PP development) in Canada:

41 to 60%
Master’s or
PhD

17 to 30%
Experience in academic
or research settings

(Bédard & Ouimet, 2012; Bernier & Howlett, 2013; Howlett, 2011; Howlett & Newman, 2010; Ouimet et al., 2009; Wellstead et al., 2009)

- Interviews with municipal public servants: similar trends

BUT do not understate background differences, especially in terms of **subject areas of expertise**

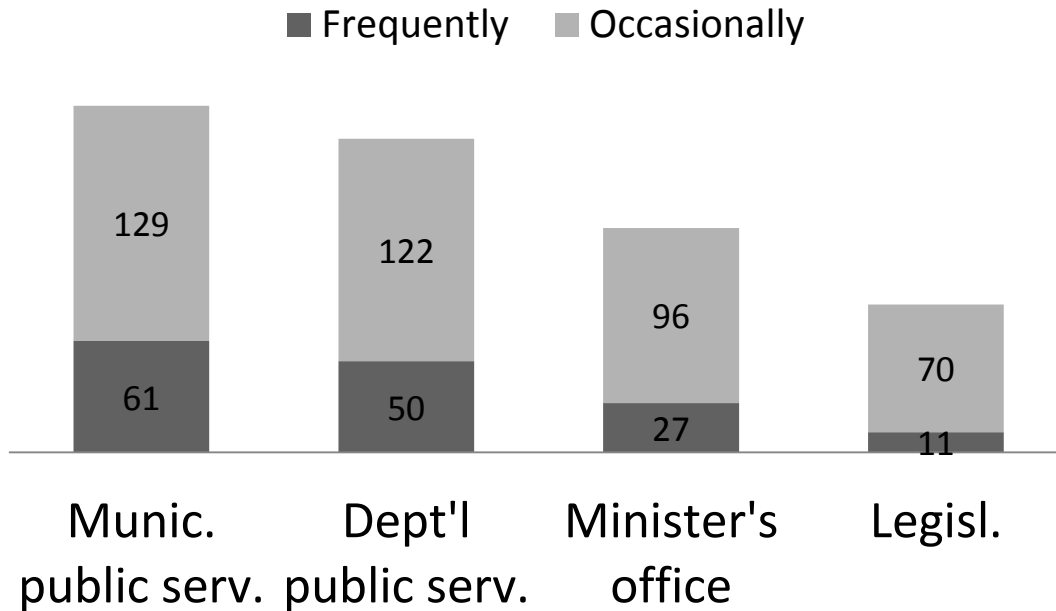
=> **Neither ignore, nor exaggerate, differences**



Several “them(s)”

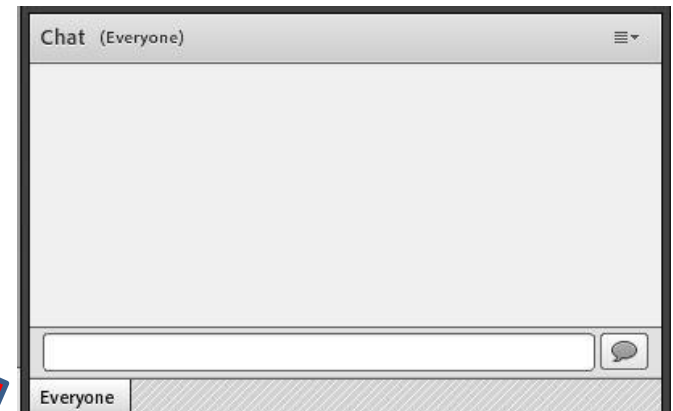
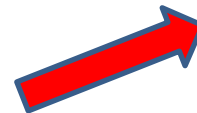
Poll in the registration form (n = 274)

Your interactions with advisors:



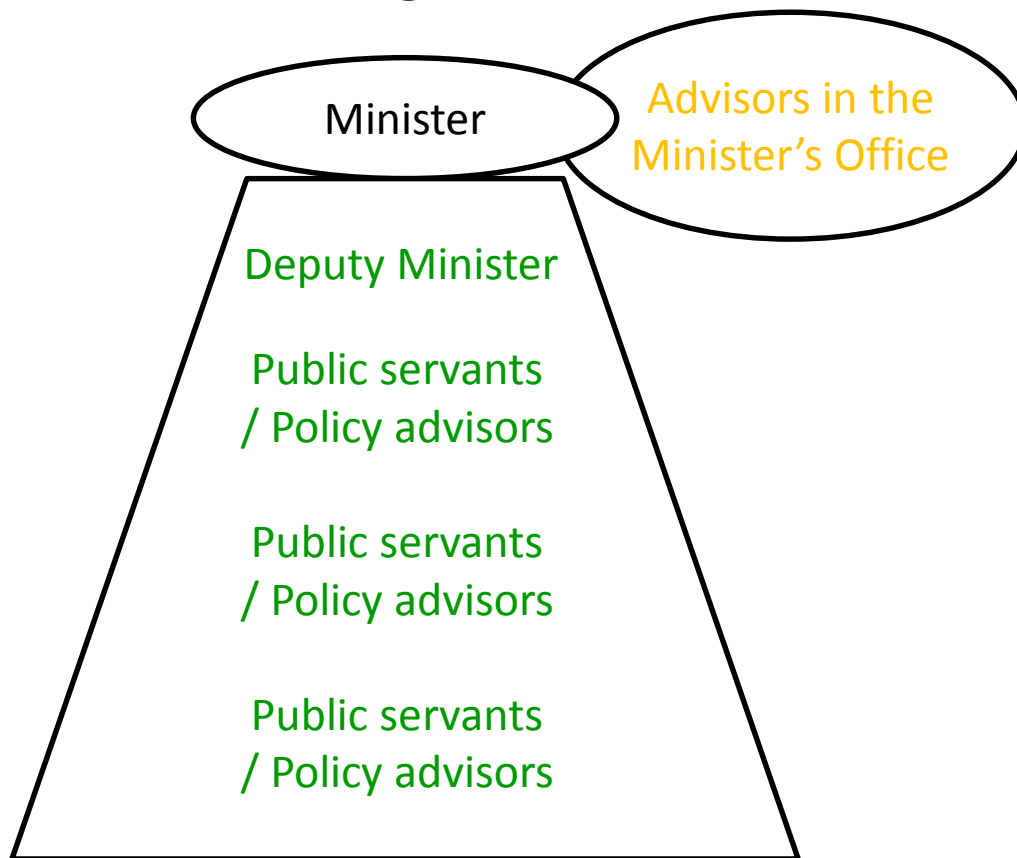
* “Frequently” = quarterly or more often

What differences do you see between these four types of advisors?



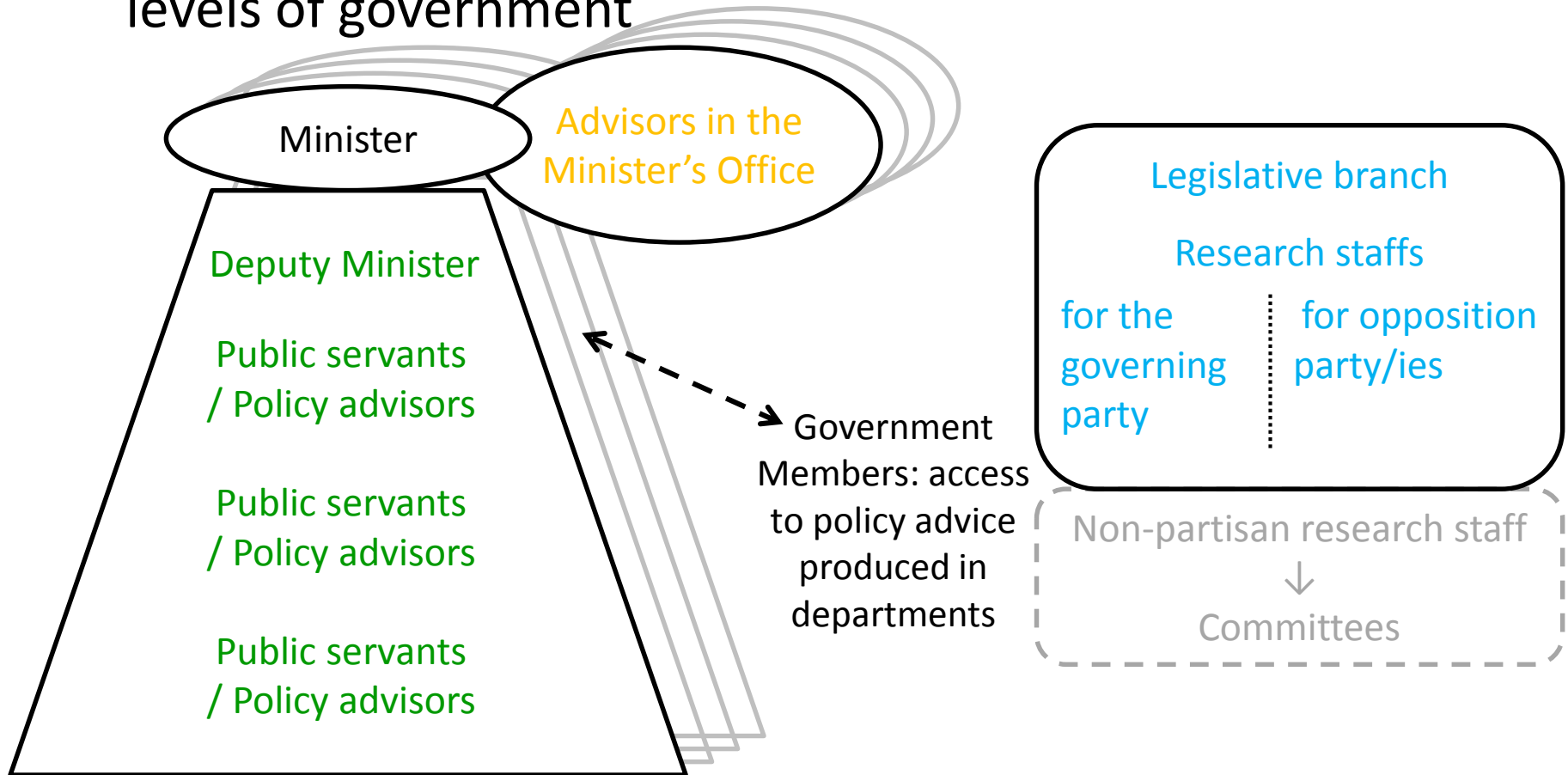
Several “them(s)”

An aside: let’s consider advisors at the provincial or federal levels of government



Several “them(s)”

An aside: let’s consider advisors at the provincial or federal levels of government



Several “them(s)”

Very broad features:

- Type of policy advice

Minister’s Office

Public servants
(dept. + munic.)

Legislative
branch



Technical

Political

=> Impact on the way they use knowledge



Several “them(s)”

Very broad features:

- Profile of the advisor

Advisor in the United States Congress:

“My boss has to go from Iraq to immigration to farming to ethanol to then doing something on nutrition for infants. I get five minutes to brief him before we go.”

(in Gilson Siström, 2008, p. 95)

Public servants
(dept. + munic.)

Minister’s Office

Legisl. branch



Specialist

Generalist

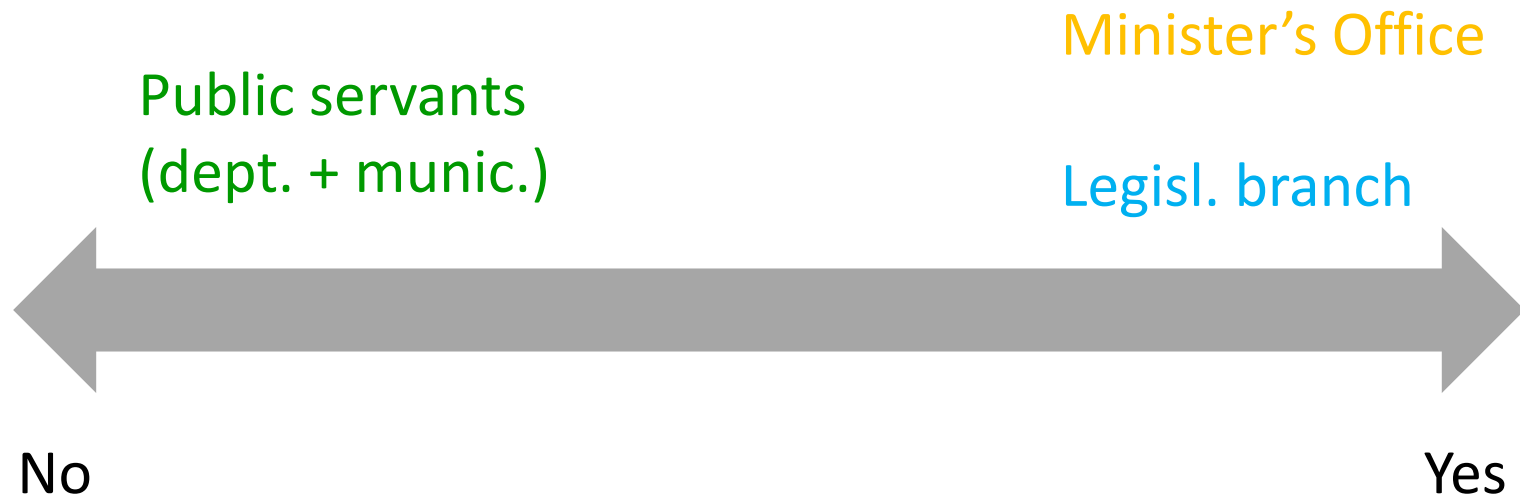
=> To be considered when sharing knowledge (whom to target + explanations)



Several “them(s)”

Very broad features:

- Position depends on the policy maker



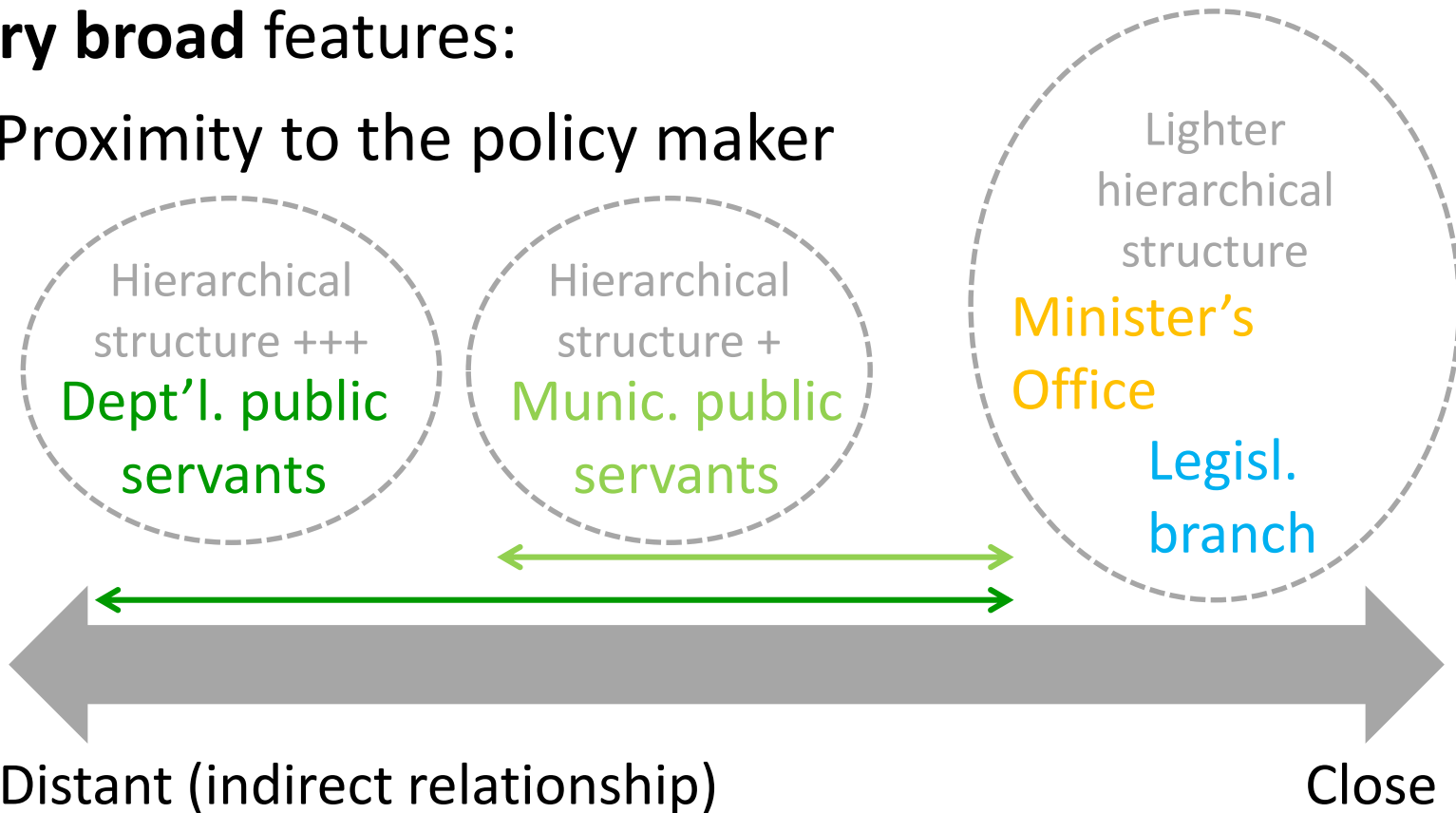
=> Time frame in which outcomes can be expected?



Several “them(s)”

Very broad features:

- Proximity to the policy maker



=> How many intermediaries and how much weight do their opinions carry?



Tips: Whom to approach?

Which **government level(s)** is/are responsible for the policy area of interest?

- Municipal => **Municipal public servants**
- Provincial or federal: which type of advisor?



Tips: Whom to approach?

Which **government level(s)** is/are responsible for the policy area of interest?

- Municipal => **Municipal public servants**
- Provincial or federal: which type of advisor?
 - PH knowledge is “technical”
 - => Most natural contacts = **Public servants in the relevant department(s)**
 - In Canada: the executive branch (departments) weighs more in determining policy directions than the legislative branch.



Tips: Whom to approach?

Provincial or federal level: which type of advisor? (cont.)

- Approach **advisors in the Minister's Office**? Lack of data
 - Advantage over public servants in relationships with Minister
Departmental public servant, UK: *"If you're trying to say to the minister, 'Look at this important evidence,' you wouldn't want the **adviser** going, 'What a load of old rubbish!' So it's important, from our perspective, for the adviser to say: 'It's credible and good.'"* (in Smith, 2013, p. 93)
 - But less accessible, and may use the knowledge for political goals?



Tips: Whom to approach?

Provincial or federal level: which type of advisor? (cont.)

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 - But less accessible, and may use the knowledge for political goals?
- If turned down in Departments: **research staff of opposition parties**
=> Goal: generate debate + prepare the ground for the future
To be expected: political use of the knowledge



Several “them(s)” (cont.)

Once you have targeted a government structure and a type of advisor:

⇒ Who works on “your” **topic** and contributes to **policy development**?

Several answers? Example: **pedestrian network**

Municipal public servant (planner), interview:

*“The City gets an annual budget for improvements and construction of new sidewalks and trails and whatnots. And that all happens through our **Public Works Department** [...] The health care professionals need... reaching out to planners [**Planning Department**], that may be a start, but they need to make sure that they're reaching out to people that are making the decisions about our pedestrian network, and in a lot of cases it might not be planners, it might be engineers [= Public Works Department]”*



Tips to understand who does what

- Municipal (+++) or departmental **website**:
 - Organizational chart
 - Webpages of the various units: window onto their work
 - Staff directory (not always)
 - Municipality: agendas and minutes of Council meetings
 - Municipality: calendar of public meetings, consultations, etc.



Tips to understand who does what

- Municipal (+++) or departmental **website**:
 - Organizational chart
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- **Professional association** (e.g., planners, engineers): website and local events (e.g., lunch speaker series)



Tips to understand who does what

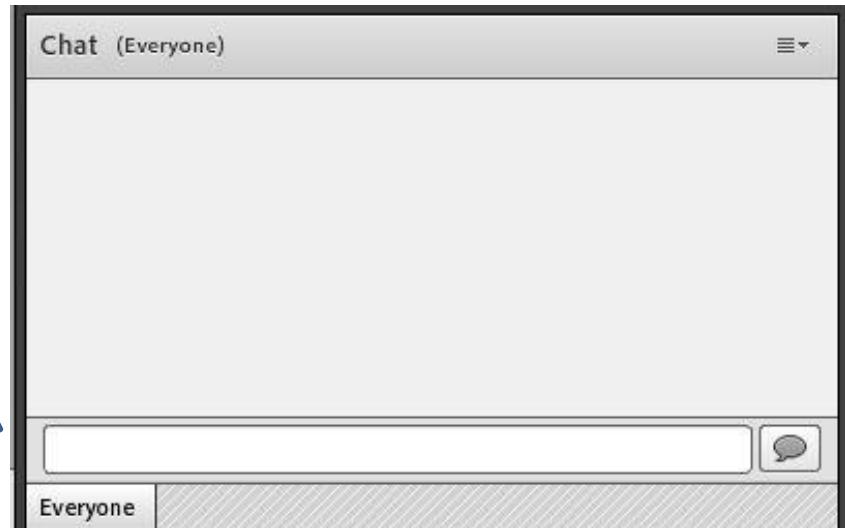
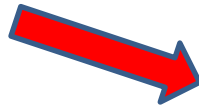
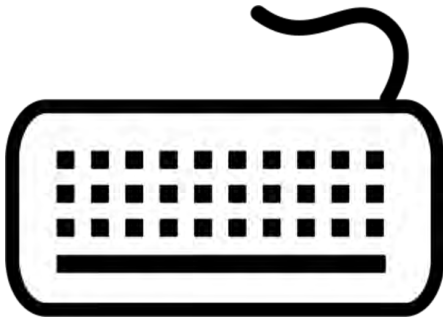
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 - Cities: agendas and minutes of Council meetings
 - Cities: calendar of public meetings, consultations, etc.
 - **Professional association** (e.g., planners, engineers): website and local events (e.g., lunch speaker series)
 - A PH colleague who already has contacts
 - A public servant with whom you have an informal connection
 - A unit director
- People who can guide you



Do you have other tips to share?



Questions?



WHY APPROACH **ADVISORS** RATHER THAN **POLICY MAKERS**?



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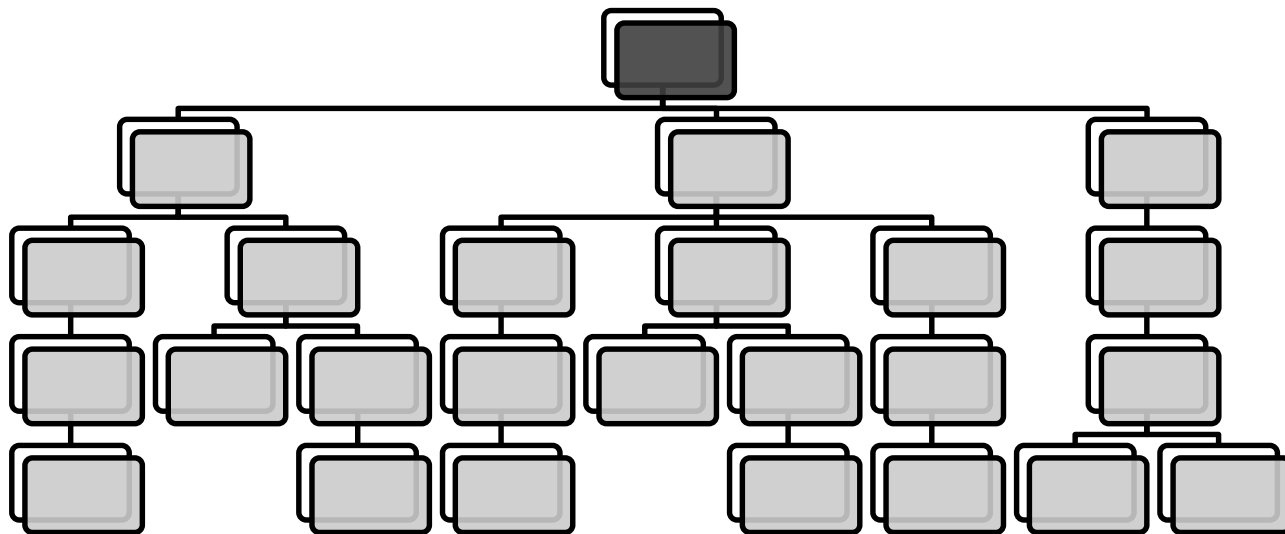
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Myth:

More effective to avoid intermediaries



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Reasons for approaching a policy maker

- Has the **final say** (at his/her level...)
- Get round “information **filters**”...
... who may either discard or transform the knowledge you shared

But can one actually bypass advisors?

Departmental public servant, Australia:

“Quite often you’ll find people think that “Well if I’ve got in the Minister’s ear I’m fine...”. [...] What happens is if they’re lucky enough to have got an appointment with the Minister we will have had to brief the Minister about what we think this person’s going to talk about... It’s much better to strategise with the department about how you use that opportunity.”

(in Haynes et al., 2012, p. 4)



Reasons for approaching advisors

- **Feasibility**

- More accessible (less the case in **Ministers' Offices?**)
- Hierarchy matters on both sides



Reasons for approaching advisors

- **Feasibility**

- More accessible (less the case in Ministers' Offices?)
- Hierarchy matters on both sides

- **Relevance**

- Process the knowledge that feeds into PP dev't.

Municipal public servant, interview: *“At the end of the day, that staff are the ones working on it”*

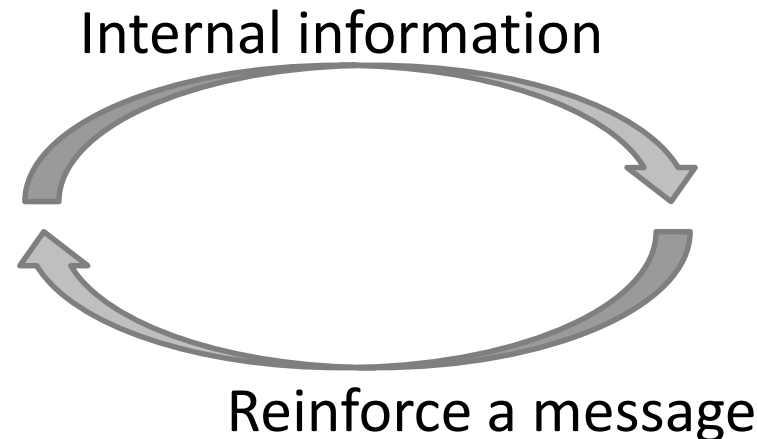
- In a better position than you to speak to the policy maker:
 - Insider's perspective on priorities, issues, decision-making processes
 - Trust (\pm)
 - More than one opportunity



Reasons for approaching advisors

- **Relevance (cont.)**

- Sometimes looking for allies



Departmental public servant, Australia:

“We will often say [to researchers], “You wouldn’t believe what they want us to do, but can you help in some way?” [...] We have to drag good public health researchers into the minister’s office to try to make the case.”

(in Haynes et al., 2011, p. 576)



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Reasons for approaching advisors

- **Relevance (cont.)**

- Policy makers come and go, while **public servants** remain

Policy maker, Canada:

“If they want to stop something, if they want to slow something down, eventually they’ll win, because they’ll be there forever.” (in Waddell et al., 2005, p. 1652)

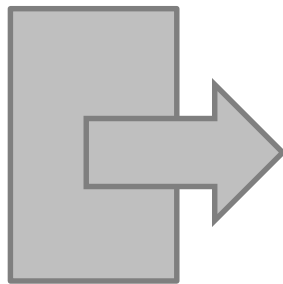
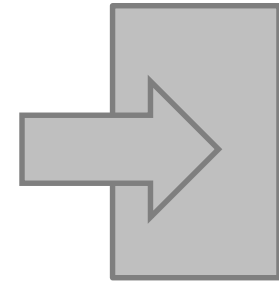
Keep ideas in store until the context becomes more favourable



Tip: Not an “either/or” case

Even if the goal is to meet with a policy maker:

- Advisors as a **gateway**
Prepare the ground with them
- Advisors (**public servants**) as an **escape route**
if no success with the policy maker?



=> Important to understand their position



HOW TO APPROACH ADVISORS?

(Interviews with municipal public servants)



Myth:

I send my paper and I'm done




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“It is not a one-time thing”

(Municipal public servant, interview)

- To open up the conversation: be **persistent**
 - To make contact => Follow-up email/call
 - To convince
- Once the conversation is open: offer **support**
 - To convince, internally and in public
 - For the implementation
- And the other way around: accept invitations (consultations, coordination meetings, ...)

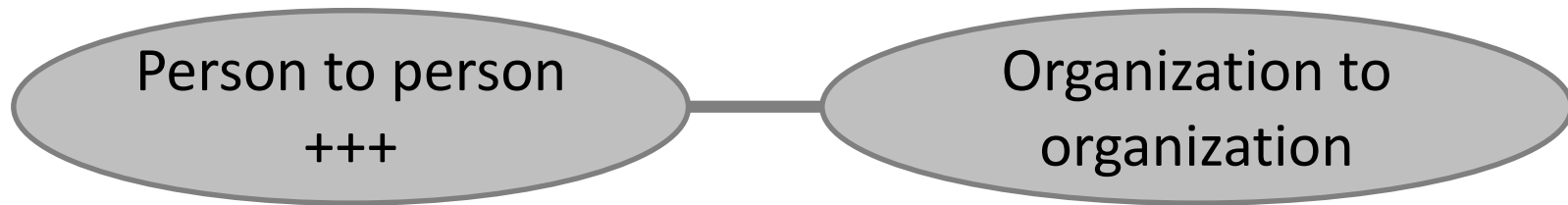


“It is not a one-time thing”

(Municipal public servant, interview)

Key features:

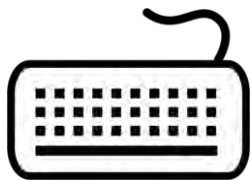
- **Levels of relationships:**



- Addition of informal contacts over **time**
 - ⇒ Growing **understanding** of common interest
 - ⇒ **Trust**
 - ⇒ Can open the way to more formalized partnerships



Myth / debate: We must translate our knowledge into policy recommendations



Do you agree?

a) Yes

b) No



Rosetta Stone - Photographer: Shriram Rajagopalan
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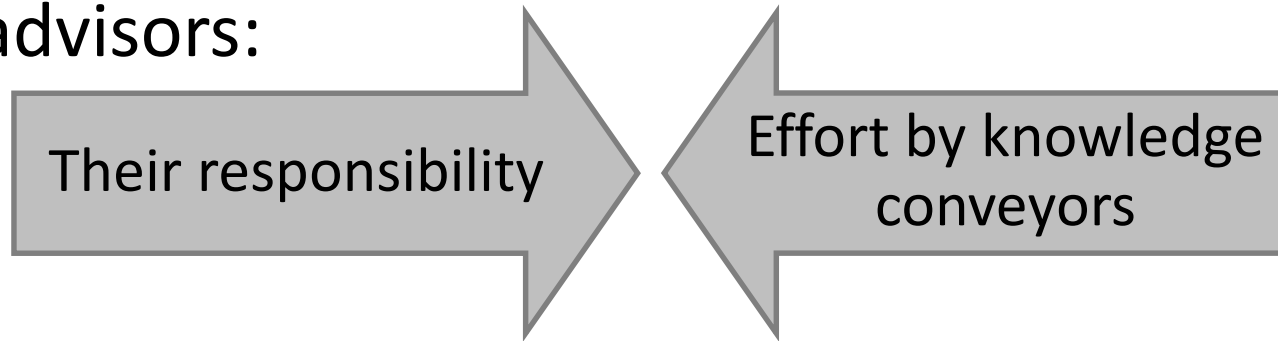


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Whose job is it?

Varying **expectations**
among advisors:



Tension – Who is better positioned to:

- Explain and make the case for the knowledge being presented?
- Put it into policy context?

=> If possible, **dialogue**



Tips – What you can do

- **Study** existing policies and implementation tools

How?

- See “Tips to understand who does what”
- Ask questions

- Highlight **common objectives**...

Municipal public servant, interview:

“What was really smart of [the Health Authority] was to draw the connection between health and how health has been articulated in our Development Plan, to demonstrate the common objectives that we have”



Tips – What you can do

- ... while **pointing precisely at the gaps/flaws**

Municipal public servant (planner), interview:

“They keep telling us over again, “We want a healthy community, we want a healthy community” [...] It's constructive when experts come with an understanding of what are the pieces that need to be fixed rather than just saying, “This is what we wanna see””

- Show **examples**: similar policies in similar jurisdictions



To learn more – To be published in 2017

Literature review

- All government structures
(But more found on **departmental public servants**)
- Also deals with topics not discussed today:
 - How/where advisors look for knowledge
 - What they do with it
 - Advisors' influence—and its limits
 - Initiatives they take
 - ...

Analysis of the interviews

- **Municipal** government
- Focus on “How-to”

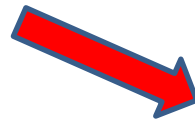
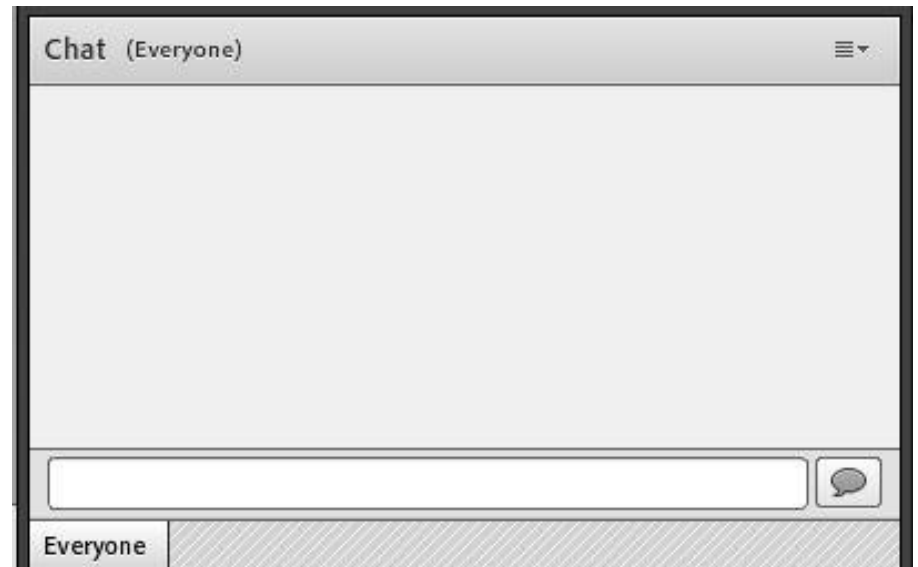
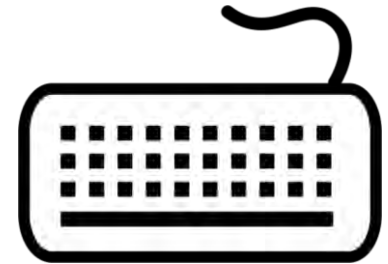
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Questions and discussion



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