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Lessons Learned: Advocating for a Specialized School of Mathematics and Science

Julia Link Roberts

Ten years of advocacy targeted at establishing a statewide residential school of mathematics and science offers valuable lessons. These lessons learned from one advocacy journey can be applied to other advocacy efforts and generalized beyond this particular example. Therefore, this article provides more than a description of one advocacy story. Rather, it highlights 11 lessons learned from this case study. These lessons can be used to guide planning to build advocacy in order to reach other goals as well.

Keywords: advocacy, communication, economic development, decision makers, math, message, relationships, residential school, science, specialized school

Advocacy is the beginning step in many innovative endeavors. Short of an initiative directly promoted by the governor, like Governor James Hunt provided to establish the North Carolina School for Science and Mathematics, it is essential to have a well-planned advocacy campaign that addresses both sound educational principles and political needs and concerns of stakeholders. Concurrently, a well-thought-out advocacy plan needs to remain flexible and responsive to new opportunities as they arise. Planned actions as well as responses to opportunities are key to effective advocacy plans that reach their intended goals.

Our goal was to establish a statewide residential school with a focus on science and math for high-school juniors and seniors. In the fall of 2007, the Carol Martin Gatton Academy of Mathematics and Science in Kentucky opened for its first cohort of students. Schneider Hall, located on the campus of Western Kentucky University, was renovated to become the home of the Academy. One hundred and twenty students now take university classes and graduate 2 years later with a high-school diploma and 60 hours of college credit. Kentucky became the 14th state to have a residential school with a focus on mathematics and science that is supported by the state budget. But that is the end of the story. Let's look back and trace highlights of this advocacy journey.

LESSON 1: ESTABLISH THE POINT OF COORDINATION FOR THE ADVOCACY PLAN

A person or group must orchestrate an advocacy plan. Formally or informally, someone must be in charge. The coordination of this advocacy plan rested on the director of the Center for Gifted Studies at Western Kentucky University. Various groups and many individuals offered support; however, the director of the Center for Gifted Studies was the point-person to coordinate the dissemination of information and the planning of the next steps. The coordinator or coordinating group must have a plan to influence decision makers. It is important that the coordinator have connections to individuals who will be key in the decision-making process as well as with others who have the ear of decision makers. For reaching the goal, it was essential to work with decision makers who would support funding and provide the bonding capacity to renovate the building designated to be the home of the school and later to establish the budget to implement the school.

LESSON 2: IDENTIFY YOUR GOAL AND PLAN YOUR MESSAGE

When the idea of a residential school first emerged, several questions were posed: Who will be interested in supporting the concept? What aspects of the school will appeal to various audiences? What major points would interfere with gaining support? Messages must be crafted to communicate important points to the public and to decision makers, and these messages are key to garnering support. One

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cannot underestimate the need to plan those messages, taking into account what resonates with various audiences and stakeholders.

Crafting the appropriate messages was critically important in winning support for the concept of an academy for students from across the Commonwealth of Kentucky. Messages to establish the need for the statewide school were tied both to economics and educational opportunities. The economic theme was to develop the talents of Kentuckians in order to create an economy with a strong innovative base. Statistics proved helpful in communicating this message. For example, Kentucky ranked 47th in the number of working scientists and engineers in 2002, an unenviable position to hold (Ewing Marion Kauffman Foundation, 2007). Economic development is linked to innovation, and innovative ideas often come from scientists and engineers. In response to this theme, the Academy proposed to offer opportunities to learn at complex levels and to engage in research throughout the 2-year experience. The statewide scope of the school would provide these opportunities to budding scientists, mathematicians, and engineers from all communities across the Commonwealth. Those students who were ready to engage in higher-level learning and research opportunities beyond what most high schools could provide would be well served by the proposed Academy, and no part of the state would be ignored. In addition, the statewide school would provide school districts with a way to provide appropriate educational opportunities to their students who are most advanced in mathematics and science. These messages were consistently communicated by all advocates to all decision makers. Consistency and persistence were key.

LESSON 3: ESTABLISH RELATIONSHIPS WITH KEY DECISION MAKERS

Who would be most critical to have on board in order to get the idea implemented? If the proposed idea needs to be included in the state budget, certain decision makers must be supportive to get the idea through the legislative process—the leadership of the house of representatives and the senate as well as the governor, head of the executive branch of government. Leadership in the house and senate really can facilitate the process or they can put a halt to proposed plans, so their importance cannot be overestimated.

Relationships must be established prior to approaching leaders with a need. An important question to ask is “Who knows individual members of the house of representatives or the senate?” Long-term relationships can be useful when quick action needs to be taken, especially when legislative opportunities come up suddenly and perhaps unexpectedly. Finding a friend to the cause who is also a friend to the decision maker proves to be both handy and critical. Relationships do not develop quickly, so it is necessary to build relationships with the individuals who can make things

happen in order to reach a desired goal. If such relationships do not already exist, it is important to begin those relationships by planning meetings.

LESSON 4: EDUCATE INDIVIDUALS ABOUT THE NEED

Who shares the goal or would be likely to share the goal if they knew about it? In 1998, the idea of a state residential math and science school was made official with a proposal developed by Dr. Charles McGruder, Professor in the Department of Physics and Astronomy, and Dr. Julia Link Roberts, Mahurin Professor of Gifted Studies and Director of the Center for Gifted Studies at Western Kentucky University. They submitted the proposal to the Council for Postsecondary Education. The proposal described the residential school concept and requested financial support to initiate planning for the school.

Right away, two key individuals provided initial as well as long-term support for the proposed program—Dr. Gary Ransdell, President of Western Kentucky University, and the Honorable Jody Richards, speaker of the house in the Kentucky General Assembly. Both were in positions to lend tremendous support for this proposed school. President Ransdell was influential in working with the Council on Postsecondary Education, the agency through which the funding was directed. Speaker Richards provided leadership in moving the concept from an idea to a reality.

Another way to educate individuals about the need for and the viability of the idea is to invite them to visit a similar school and talk with staff, faculty, and students. This step was important in gaining “buy in” for the concept. A visit to the Texas Academy of Mathematics and Science was arranged for key stakeholders. The Texas Academy was selected because the proposed Academy would follow the model implemented in Texas. Included in this trip were the president of Western Kentucky University, deans of the College of Science and Engineering and the College of Education and Behavioral Sciences, a math professor, two superintendents of school districts, the development officer who would be working with the Academy, and the director of the Center for Gifted Studies. All of the individuals who made this visit were ones who would field many questions about the proposed school and who would be important in convincing others that the statewide school would be important in creating a bright economic future for our state. All who made the visit were also connected with influential individual and strategic groups with whom to share information. It was important that the superintendents were ones with high credibility among other superintendents. Of course, the perception of superintendents was critically important for getting support from that role group across the state.

Although the proposed Academy would be a statewide school that would be separate from the university, it would

be located on the university campus and Academy students would be taking university classes. Therefore, support from decision makers within the university was vital. Building support was the goal of the visit, and individuals who traveled to visit the Texas Academy returned home convinced of the merit of such a school. All members of the group were committed to the concept of establishing a similar school in Kentucky. Talking with students at the Texas Academy made the greatest impact on visiting team members. After listening to the students describe the impact on their lives of the challenging learning experiences, a superintendent stated, "I would become a principal again if I could work with students like these." After the visit to Kentucky, this superintendent followed up with Commissioner of Education, Gene Wilhoit, on his perceptions of the Texas Academy and the need for Kentucky to establish a school based on the Texas model. Communicating with others about the residential school concept was more convincing after visiting a similar school. Each person who made the visit could advocate for the Kentucky Academy in which young people from across the Commonwealth could study advanced math and science with peers who were equally interested in research and learning at high levels.

The governor of a state is an important policy maker to educate. In 2003, Kentucky was in the midst of a gubernatorial campaign. Both candidates were invited to come to the Summer Program for Verbally and Mathematically Precocious Youth (VAMPY), a summer residential program for gifted students in Grades 7–10, hosted by the Center for Gifted Studies. One of the two candidates, Congressman Fletcher, accepted the invitation and came to address the young people attending VAMPY. Students asked perceptive questions of the candidate, making a definite impression on this decision maker who was subsequently elected governor of the Commonwealth of Kentucky. Please note that both of the candidates were invited to come. Issuing invitations is an important step in advocacy because most people will not offer to stop by. Planning must be proactive, initiating opportunities for the key decision maker to visit a place where he or she can interact with students who can communicate the need to have a residential school for students across the state.

In addition to inviting stakeholders and policy makers to meet with gifted youngsters, arranging events for decision makers where advocates can talk to members of the general assembly was effective. For example, we hosted a luncheon for Congressman Fletcher when he was candidate for governor. Also included at the luncheon was the chair of the Senate Appropriations and Revenue Committee. Advocates on campus and throughout the state were included to highlight the advantages to the state that the Academy would have. Decision makers across the state must be informed about an advocacy goal and know why it is important. The more they develop ownership in the idea, the greater the chance that the idea will reach the implementation stage.

LESSON 5: SOLICIT POSITION STATEMENTS FROM KEY STAKEHOLDERS AND POLICY MAKERS AND MAKE THEM KNOWN

Statements on gifted education and the Academy of Mathematics and Science in Kentucky were solicited from the candidates for governor. These statements were then published in the Kentucky Association for Gifted Education (KAGE) newsletter and *The Challenge* (Roberts, 2004), the biannual publication of the Center for Gifted Studies.

Then-Congressman Fletcher wrote in his statement: "I believe that the proposed Kentucky Academy of Mathematics and Science is an important part of ensuring future economic prosperity in our state" (Roberts, 2004, p. 1). A statement of this level of support is very important to have. In fact, it would be difficult to overestimate the importance of key stakeholders and policy makers making strong statements of support for the proposed idea. Statements written during the campaign provide grist for follow-up visits when the candidate assumes office and for subsequent conversations about the goal.

It is far more likely that an idea will gain support from a candidate before he or she is elected to office. Asking for a statement on a particular topic is no guarantee that the candidate will offer his or her support, but it is unlikely that advocates will get such a statement unless one is requested. Once again, advocates must be the ones to initiate the action.

LESSON 6: FIND NEW FRIENDS AND SUPPORTERS

Advocates need to be on the alert for interest expressed in science and math as well as in a specialized school of math and science by people in all walks of life. One friend of the Academy was identified at an advocacy presentation to a local service club. After the presentation, a man asked how he might help. He was an attorney with a public relations consulting firm unknown to those individuals working to establish the school. Once his interests and expertise in public relations were recognized, he worked to design the initial brochure for the Academy. What a perfect opportunity for a new friend to contribute to reaching the goal.

Who else is interested in academic excellence? The answer to that question helped identify potential supporters across the state, because the goal was to have a residential school for young people from all parts of the Commonwealth. Strong advocacy campaigns are built on finding friends and supporters.

In Kentucky, it was important to link with organizations that support gifted education and science, mathematics, engineering, and academic excellence. The Kentucky Association for Gifted Education by way of *The KAGE Update* included up-to-date information about the Academy over the entire extent of time devoted to advocating for the

Academy. Although the Academy has been up and running for over 2 years now, updates continue in this organization's publications.

One effective way to educate others about your goal is to sponsor exhibits at state conferences. Exhibits at conferences for math, science, and gifted education provided opportunities to talk one-on-one with educators in those content areas about opportunities the Academy would offer to the students who were ready for advanced study, especially in math and science. Likewise, exhibits at conferences for superintendents, principals, and counselors allowed individuals to ask questions and learn about what the Academy would offer to students in their districts. Upon learning about the idea, one superintendent said, "Wouldn't I be proud to have a student from my district accepted to the Academy!" That expression of support was one that advocates shared with other school leaders in the hopes that all administrators would take that stand toward the Academy.

New friends and supporters are essential for carrying an idea forward to implementation. Do not expect friends to just appear; it is important to seek them out.

LESSON 7: USE EXPERTISE TO BUILD SUPPORT

Expertise lends credibility to the goal. That expertise may come from discipline specialists such as scientists, mathematicians, and engineers or from educators with experience in similar academies. Both types of expertise were used to sell the idea of the Academy in Kentucky.

Dr. Richard Sinclair, Director of the Texas Academy of Mathematics and Science, had years of experience that he generously shared with Kentucky legislative leaders and the governor. His trips were planned to coincide with receptions that were hosted for legislators during the legislative sessions. In addition, Dr. Sinclair was willing to share his experience with the cadre of individuals who were planning the Academy.

Expertise also comes from representatives from science, technology, engineering, and mathematics (STEM) fields. Colonel Terry Wilcutt, the first Kentuckian to be an astronaut and commander of four shuttle flights, stepped up as a spokesperson for the Academy. He also joined in talks with legislators and the governor. When a Kentuckian with a well-known record of space flights endorses the proposal to establish the Academy, it creates tremendous credence in the eyes of many.

Mr. Dale Brown, Superintendent of the Warren County Schools, used his experience and connections with key decision makers in the legislature as well as in statewide organizations to support the concept of the Kentucky Academy. When there were legislative hearings or if we needed to meet with a legislator, he willingly joined the meeting. His support indicated that the Academy would be a

positive development, offering educators a way to provide appropriately challenging educational opportunities to young people who needed more challenge than most school districts could provide.

Do not hesitate to ask for experts to support a proposed idea. Experts are individuals who will understand the goal and likely lend their support. They already have credibility in their fields, so their statements of support resonate with others who may not know anything about the goal or who have wondered about the validity of the idea. When experts support the idea, use their statements in brochures and on websites. The words of well-established experts can garner support for the cause.

LESSON 8: LINK WITH GROUPS THAT MAY INFLUENCE DECISIONS

Numerous groups can influence decisions at the state level. Business, community, and educational groups can provide venues for sharing information about the goal with their members. Contact them and offer to speak with their boards or their groups about the proposed idea and the needs that the Academy will address.

An example is ConnectKentucky, an organization working with every county in the state to establish a network of technology. The executive director of ConnectKentucky met with advocates for the Academy to learn about the proposal. As a follow up to the visit, ConnectKentucky published a story about the Academy in their newsletter that has state-wide circulation. Two years after the initial meeting with the leadership of ConnectKentucky, the author of this article was invited to address the board of directors of ConnectKentucky, providing a high-profile opportunity to get the word out to influential citizens of the Commonwealth.

Educational groups can support a goal if they understand it and see how the implementation phase of the Academy will work. The P-16 Council, the Kentucky Board of Education, the Professional Education Standards Board, and the Kentucky Department of Education were groups identified by the Academy's advocacy group as those who needed to know about the proposed school. Visits with the leadership often lead to opportunities to present to their respective boards. No opportunity to present on the Academy idea was ignored.

Members of the Kentucky Association of School Superintendents needed to know about the idea for a residential school if they were to be supportive of the concept. Offering information in the exhibit area of their biannual convention provided the opportunity to talk with many conference attendees. They needed to know that the state assessment scores for the students attending the Academy would be sent back to the home school and included with their home high-school scores. They needed to know that the district could keep the honors of these students, because the students would be not only products of the Academy but of years of

schooling in their home districts. The Kentucky Association of School Superintendents invited the author to address the assembled superintendents at three conventions, providing an update on the Academy. Opportunities of this type do not usually just happen. Instead, the starting place for these relationships would be with links to leadership in organizations.

Speaking to civic and community groups is an effective way to build support. Make it known that speakers are available and encourage program chairs to contact the administration of the Academy for a presentation. Do not hesitate to contact the organization with an offer to present a program. Willingness to provide programs and readiness to travel to do so will yield dividends in building and maintaining support. The need to offer programs to civic and community groups continues after the Gatton Academy opened. These same networks have provided opportunities to make presentations on updates and how students can apply to the Academy.

LESSON 9: USE ADVISORY GROUPS FOR IDEAS AND CONTACTS

The Center for Gifted Studies Advisory Board served in an advisory capacity for the Academy during the building years for the Academy. Members of the Advisory Board took what they learned about the Academy and shared it with groups to which they belonged. They had contacts with the Prichard Committee for Academic Excellence, Kentucky Educational Television, legislators, media, and opinion makers. These contacts were invaluable. They created interest and spread the message about the Academy and the need to establish such a school.

Each year, during the legislative session, the Center for Gifted Studies held a reception in Frankfort, the capital of Kentucky. Members of the Center for Gifted Studies Advisory Board came to the reception, issuing special invitations to their local legislators and to friends and acquaintances in statewide positions. Board members may not need to know key decision makers personally, but they need to know people who do know them and be willing to advocate for the proposal.

If advocates have an advisory board, they need to get a list of their contacts and solicit their ideas for building support for the project. The more they build upon the contacts of the advisory board, the greater their opportunity to disseminate information about the project. If advocates do not yet have an advisory board, they should seriously consider establishing one.

LESSON 10: STAY UP TO DATE WITH RESEARCH AND RECOMMENDATIONS

In 2005, the National Academies Press released the prepublication edition of *Rising Above the Gathering Storm*

(Committee on Prospering in the Global Economy of the 21st Century). One of the 20 recommended actions was to “enlarge the pipeline.” One suggested approach for improving K–12 science and mathematics education was “statewide specialty high schools” (pp. 5–18). These specialized statewide schools “can foster leaders in science, technology, and mathematics” (p. 4).

During the course of our advocacy work, we targeted concern among Kentucky legislators about brain drain. Statistics showing the potential positive effects such a school might have on the economy and keeping talented people in the state are important to decision makers.

Not only were economic indicators of the state important in communicating a compelling message related to the need for a residential school, but so were national rankings. The 2007 rankings placed Kentucky 43rd in patents issued and 42nd in entrepreneurial activity (Ewing Marion Kaufman Foundation, 2007). Tying the mission of the residential school to Kentucky’s rankings on economic indices makes a strong statement of the continuing need to develop leadership in STEM careers. Keeping up to date with such rankings is important in keeping a strong message current.

LESSON 11: KEEP PUBLIC RELATIONS PLANS ONGOING

Once the goal is reached, public relations plans cannot be shelved. Support for continued funding must follow immediately after the funding is secured. Building support implies that the process continues. Newcomers to the state, new leaders in organizations, and newly elected officials need to hear about the Academy. In addition, updates must be provided for individuals and groups that have previously provided support.

The Web site for the Gatton Academy of Mathematics and Science in Kentucky (<http://www.wku.edu/academy>) supplies up-to-date information to various segments of the public—current students, future students, parents, and interested citizens. The Web site gets the word out about opportunities the Gatton Academy offers to young people and to the Commonwealth. The goals of the Gatton Academy are to enable Kentucky’s exceptional young scientists and mathematicians to learn in an environment that offers advanced educational opportunities and to prepare them for leadership roles in Kentucky’s future. Both goals stay front and center, and both need to be known so that decision makers understand that the outreach of the Academy extends way beyond the 120 students currently in residence at the Gatton Academy.

A good example of a project designed to disseminate word about the importance of high-level learning in STEM disciplines is a partnership with the Prichard Committee for Academic Excellence, a statewide organization with a 25-year history. Currently, the Gatton

Academy of Mathematics and Science in Kentucky and the Center for Gifted Studies are partnering with the Pritchard Committee on a yearlong project to increase parent support for STEM initiatives in elementary, middle, and high schools. The AT&T Foundation has provided funding for this STEM project that will add to the visibility of the partners and boost interest and achievement in the STEM disciplines. Toyota partnered with the Gatton Academy to get information about the Academy out across the Commonwealth. Each of the partnerships has provided opportunities to create awareness of the Gatton Academy's purpose out to people across the state and to serve as a beacon of excellence for schools in all parts of the Commonwealth.

The advocacy campaign that led to the opening of the Carol Martin Gatton Academy of Mathematics and Science in Kentucky lasted a decade. Persistence was a key characteristic of advocacy for the Academy, as it is for most advocacy campaigns. One must really believe in the value of the goal in order to keep moving forward even when funding does not come on the schedule that was hoped for. In truth, advocacy for a cause does not end when the goal is implemented. Advocacy must continue in order to solidify support for the important opportunities that the Academy

provides for young people to learn at high levels and to engage in research in math, science, and engineering. With the Gatton Academy up and running, parents and students became another pool of advocates.

This article has focused on advocacy lessons learned during the decade between the presentation of the idea for a statewide school with a focus on math and science in Kentucky and the opening of the school. The story in another state would not be identical; however, the advocacy lessons would be applicable as they would be to other advocacy goals. If the goal is important, then advocacy is necessary in order to reach that goal.

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Julia Link Roberts, Ed.D., is the Mahurin Professor of Gifted Studies and the Executive Director of the Center for Gifted Studies and the Carol Martin Gatton Academy of Mathematics and Science in Kentucky. During the celebration of Western Kentucky University's Centennial in 2006, Dr. Roberts was honored for her work by being named one of the 100 gifts Western Kentucky University has given to the world. She is an active advocate for gifted children at the state and national levels. For her advocacy work, she received the very first David W. Belin Advocacy Award from the National Association for Gifted Children (NAGC) in 2001. In *Profiles of Influence in Gifted Education* (Prufrock, 2004), Dr. Roberts was described as one of the 50 most influential people in the field of gifted education. Dr. Roberts is a leader in gifted education serving on the boards of the Kentucky Association for Gifted Education, the National Association for Gifted Children, and the Association for the Gifted (a division of the Council for Exceptional Children); and she is one of three elected delegates from the United States to the World Council for Gifted and Talented Children.