



## CHAPTER MATCHMAKING

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### WHY CHAPTER MATCHMAKING?

As networks of scholars with wide-ranging policy expertise, SSN chapters are well-positioned to broker relationships between local researchers, practitioners, and policymakers to address local policy problems.

These relationships may entail informal collaborations in which stakeholders bring diverse knowledge and lived experience to conversations about topics of mutual concern. Or they can entail formal collaborations on a project with shared ownership and decision-making authority. Either way, these connections often do not happen organically. They need to be actively brokered.

That's why chapter leaders and fellows often facilitate matchmaking between scholars and non-academic stakeholders who are excited about sharing expertise and the prospect of mutual learning. Below we describe the process for brokering these connections: sourcing asks, refining asks, and making matches.

### FIRST, SOURCE THE ASK

Matchmaking often begins with a specific "ask" (i.e. a request to connect). We encourage chapters to focus on sourcing these asks from non-academics who want to connect with researchers, as well as researchers who want to connect with a specific policymaker or practitioner.

One way chapter leaders or fellows can solicit asks is to use the outreach method used in Levine's paper, [\*Research Impact Through Matchmaking \(RITM\): Why and How to Connect Researchers and Practitioners\*](#). The precise language will depend upon the audience, though in this case he invited nonprofit practitioners to share "challenges they are facing in their work in which they think research might be helpful." In response they shared four types of requests:

- To discuss an overview of research in a particular field or topic
- To discuss specific research that could inform an immediate decision
- To brainstorm how to measure the impact of their work
- To formally collaborate on a longer-term project with a researcher

As chapter leaders we encourage you to leverage your members' networks and "warm ties" with community and advocacy organizations, policymakers and staffers, or other key decision-makers to solicit these asks. You can also solicit asks on listservs of local practitioners. Read more about soliciting asks [here](#).

## NEXT, REFINE THE ASK

Researchers, practitioners, and policymakers are often not used to writing for one another. It takes time to develop and refine the ask for the other audience. These steps can help:

**Step 1:** Once someone indicates they have an ask, propose a brief phone call or email to discuss *why* they want to connect with another stakeholder. These “scope calls” may also help the requester refine priorities and goals.

**Step 2:** Invite the requester to send you a first draft of their ask (approx. 50-100 words)

**Step 3:** Review the draft and then follow up with edits, via email or phone. While editing, keep in mind some of the following best practices for crafting an ask:

- Keep it brief and specific
- Specify a target audience early on (in the first sentence if possible)
- Articulate how a connection could be mutually beneficial for both the requester and respondent
- Focus less on *who people are* (e.g. title, professional background) and instead on *what they know* that others might find useful and valuable for their goals

**Example:** A researcher reached out to Levine via research4impact. He was starting a new project on voter engagement and wanted to connect with a practitioner (step 1). Here’s the first draft of his ask (step 2) and the final post-edited version (step 3):

### Version 1.0: First Draft

Latino voters are increasingly politically influential and are frequently targeted by political campaigns. These targeting efforts often rely upon assumptions about Latinos – that they are pro-immigrant, Spanish-dominant, and have a strong Latino group identity. However, many Latino voters are not described by these traits, and may not be mobilized by pro-immigrant, Spanish-language, or Latino-identity messaging. The effectiveness of Latino voter outreach may therefore depend on the ability to identify Latino diversity and target strategies accordingly.

I am interested in connecting with campaigns and organizations who are involved in Latino voter mobilization to study these dynamics. What information do you have about Latinos? How does Latino diversity shape the effectiveness of targeted strategies? And ultimately, how can practitioners best mobilize Latino voters as a diverse community rather than as a monolithic group?

### Version 2.0: Post-Editing

I am looking to connect with campaigns and organizations who are involved in Latino voter mobilization. I have some new research findings on effective mobilization strategies for the Latino community that I would love to share, and I’d love to hear from others about what they’re learning and seeing on the ground. I’m especially interested to talk about diversity within the Latino community and how that impacts the kinds of strategies that are used.

**What’s changed:** Version 2.0 is shorter and only includes key content that a potential partner needs to know right away. The first sentence clearly identifies the target audience and emphasizes the benefit of the exchange. It also omits language that reflects assumptions in the academic literature that may not resonate with practitioners.

## THEN, MAKE A MATCH!

Once asks have been edited and refined, SSN chapters can facilitate connections in three ways.

### 1. Individual Matchmaking

If you already have a great match in mind, then you can consider connecting stakeholders individually. Levine's [RITM paper](#) provides tips for facilitating introductions between diverse stakeholders:

- Include short paragraphs that focus as much as possible on each person's unique and relevant expertise, rather than biographical details or titles
- Frame the match as a mutually beneficial opportunity (e.g. state they will "learn a lot from one another")
- (Re-)state the explicit goal of the collaboration to ensure it is common knowledge

### 2. Chapter Newsletter

Instead of immediately making a connection, you can include the requester's ask in a chapter newsletter. Newsletters reach a wider audience of potential matches, including individuals who may be missed by individual matchmaking. Recipients may also forward newsletters to others to reach a wider audience. Publishing asks in a newsletter also helps set a norm, establishing that others value these types of cross-stakeholder connections. This can prompt people who may not have previously thought about engaging in a collaboration to consider doing so.

Here are some tips for putting together chapter newsletters for matchmaking:

- Edited asks should remain brief (~50-100 words)
- Each ask should include a headline specifying the target audience (e.g. "Attn: Medicaid scholars")
- Number each ask (i.e. "Opportunity #1", "Opportunity #2") – makes it easy for respondents!
- Structure the newsletter to include visual cues that separate each ask
- Consider making asks anonymous and offering to broker relationships when people respond (in which case use the tips for introducing people mentioned above under "Individual Matchmaking")

### 3. Chapter Event

Bringing diverse stakeholders together in the same space can also be a valuable and fun way to facilitate new collaborations. An in-person or virtual matchmaking event allows a large number of stakeholders with asks to meet one another and potential matches. During the event, conveners can facilitate interaction in several ways, including inviting requesters to give short presentations on their ask and then matching them with potential respondents to discuss the ask.

Here are some tips for chapters hosting matchmaking events:

- Send out asks to all invitees in advance of an event, and encourage them to spread the word in relevant networks (i.e. other scholars or practitioners with expertise related to the shared asks)
- Offer each requester a set time to present it to the group of attendees
- Offer attendees time to ask questions and identify which requests most align with their expertise
- Create a physical space (or virtual, using breakout rooms) for the requesters and potential matches to meet each other, discuss goals, and exchange contact information
- Follow up with requesters to see if they connected with a match; if not, follow up with an offer to facilitate individual matchmaking or include their ask in a chapter newsletter