



## Identifying Public Policy Engagement as a Strategic Priority

### WORKSHEET

This worksheet was created to help you understand if public policy engagement should be a strategic priority to further your organizational mission and goals. We recommend you use this tool alongside the Creating a Public Policy Plan tool.

#### 1. What are your organizational goals?

**Example:** Secure access to free high-quality pre-K for all 4-year-olds in the city of Cleveland.

---

---

---

---

---

#### 2. Can any of these goals only be accomplished by changing a public policy or regulation? If yes, write down the policy and/or regulation that must change or be created.

**Example:** Universal pre-K goal: Must have regulations that define “high-quality” pre-K.

---

---

---

---

---

#### Public Policy and Organizational Survival

In some cases, an organization’s financial existence depends on policymakers, in which case public policy engagement may require further consideration. For example, if your organization heavily or entirely relies on state funds to deliver services to people in your community, you must pay close attention to who is making allocation decisions and when.

In other cases, certain elected officials or politicians may be able to affect your organization’s fundamental role in the community, such as by mandating which types of organizations are allowed to offer certain services or apply for grants. For example, the federal government oversees the state level distribution of certain education funds, so it may be helpful to recognize and thank federal officials for their engagement and support before asking for addition funds on specific projects. To protect your organization’s vitality, maintain working relationships with these decision-makers—or find workarounds to protect your ability to do your work.

[www.advocacyandcommunication.org](http://www.advocacyandcommunication.org)

For more information about ACS, please contact us at [info@advocacyandcommunication.org](mailto:info@advocacyandcommunication.org). Follow us on [LinkedIn](#).

Cleveland  
1277 West 104th St.  
Cleveland, OH 44102

Columbus  
2612 Zollinger Road  
Columbus, OH 43221

Washington, DC  
300 New Jersey Avenue, NW  
Suite 900, PMB 9005  
Washington, DC 20001

Phoenix  
207 North Gilbert Road  
Suite 007  
Phoenix, AZ 85234

**3. Is now a good time to focus on this policy change?** While you can certainly work to influence policy any time, there are times when it is especially beneficial to prioritize policy advocacy because your efforts are more likely to succeed, including:

- ▶ During election years, when candidates may be focused on your issues and/or you can hold elected official accountable for past action/inaction
- ▶ When there has been a recent change in leadership (e.g., immediately following an inauguration or during the beginning of a new legislative session)
- ▶ When there is a related legislative deadline (e.g., a budget or specific piece of legislation moving through the process)
- ▶ After or during a crisis (e.g., gun control in the wake of the Sandy Hook shooting)
- ▶ When your audience is under attack (e.g., funding is running out for needed services)
- ▶ When public opinion has reached a critical mass (e.g., the #MeToo movement)
- ▶ When you are dealing with a new issue or with new information about an issue (e.g., new research supports the importance of your program)
- ▶ When there is an active debate about the issue
- ▶ When champions have identified themselves because of personal experiences and have publicly stated they are focused on your topic

#### **4. Do you have the organizational capacity and leadership necessary to do this work?**

Strategically it's important to begin planning from a place of, "Yes, and," but at some point, every organization must come to grips with internal capacity in order to move forward with concrete planning.

The questions below will help ensure that staff, partners, and others involved have the capacity to implement activities, and assess whether there is strong leadership to keep efforts on track to achieve goals. You should consider internal and external capacity concurrently, in part because internal limitations won't preclude you doing the work if you have strong external supports (such as close partner organizations).

##### **Leadership**

1. Is there buy-in from leadership to expend time, money, and potentially political and social capital (e.g., call in favors, ruffle feathers) on this effort?
2. Who is missing from the leadership of this effort that should be at the table (either internally or externally)?

##### **Internal Capacity**

3. What challenges do you anticipate regarding internal capacity (e.g., staff time, funding, connections to community)?

4. Is there dedicated staff for the effort?
  - a. If yes, what is their role? (e.g., Resources may be needed to coordinate the effort, schedule meetings, conduct follow, locate or create documents/research, communicate with stakeholders, and manage the project timeline.)
  - b. If no, can you hire new staff or change the role of existing staff to dedicate time to this effort?
5. Who will coordinate and do the day-to-day work to implement the plan?
6. Organizationally, what financial resources do you need? How will you secure these resources?
7. What communication capacity do you need? How will you meet this need?
8. When doing public policy work, it is critical to ensure you have the capacity to shift strategies quickly as opportunities rapidly arise or disappear. How you will navigate rapid internal decision-making (Can staff decide? Does the board government relations committee need to decide?)

### External Capacity

9. What is the capacity of partner organizations and their staff and leadership to implement the plan?
10. Who are non-traditional partners that could expand capacity?
11. How will decision making be shared, if at all, with partner organizations?

To take it one step further and get a more detailed sense for capacity, complete the table on page 4. Think about the relevant skills each person has (past policy advocacy experience, communications, partner engagement), relationships they may already have with the target audiences, and how much time they can realistically put toward this effort. Include the organizational capacity of key external partners as you understand it to be, and refine it based on one-on-one conversations with those contacts.

### Overcoming Capacity Limitations

If you have identified serious gaps in leadership or capacity, there are a few options. To secure sufficient leadership buy-in, you may need to rethink your “pitch”—that is, how you articulate the urgent need to prioritize public policy work (it should be to further the mission and financial security of the organization). You may need to have additional conversations with members of staff leadership and even the board to obtain buy-in that add time, but this is usually a critical element of long-term, sustainable success.

If internal capacity is limited, explore options for training existing staff, shifting roles for a period of time, hiring new staff or external consultants, and/or engaging with partners who have different strengths.

Staff	Key Skills	Relationships	Capacity
Board Members	Key Skills	Relationships	Capacity
Volunteers	Key Skills	Relationships	Capacity
Partner Organizations	Key Skills	Relationships	Capacity



## 5. Bring it all together to answer the question, “Is public policy work a strategic priority for us right now?”

Review your answers to the above questions. If you have identified organizational goals that require a policy solution, understand this to be an opportune time for action, and have enough capacity to do this work, the answer is probably, “Yes!” Click here to access our tool Creating a Public Policy Plan and move forward. If the answer to any of these questions is “No,” that’s OK. It is important to revisit this exercise, particularly when you are doing organizational strategic planning or in relation to major shifts in public policy (e.g., after big elections). In the meantime, congratulations on keeping focused on your mission and using your resources wisely!

### References and Resources

- ▶ Advocacy & Communication Solutions. Roadmap for Engagement in Public Policy and Advocacy. [https://www.advocacyandcommunication.org/wp-content/uploads/2018/04/ACS\\_Roadmap\\_Engagement.pdf](https://www.advocacyandcommunication.org/wp-content/uploads/2018/04/ACS_Roadmap_Engagement.pdf)
- ▶ Center for Lobbying in the Public Interest. CLPI Roadmap for Engagement in Legislative Advocacy. <https://www.councilofnonprofits.org/sites/default/files/documents/c8-Road%20Map%20for%20Engagement%20in%20LegAdvcy.pdf>
- ▶ Community Toolbox. Changing Policies: An Overview. <https://ctb.ku.edu/en/table-of-contents/implement/changing-policies/overview/main>
- ▶ Stand for Your Mission. Why Advocate? <https://standforyourmission.org/advocacy-your-nonprofit/>
- ▶ W.K. Kellogg Foundation and Center for Lobbying in the Public Interest. Effective Advocacy at All Levels of Government. <http://ww2.wkkf.org/advocacyhandbook/index.html>

Visit [advocacyandcommunication.org/tools-resources](https://www.advocacyandcommunication.org/tools-resources) for additional resources related to capacity building, communication, advocacy, and strategy development.