



Creating a Public Policy Plan

If you determine that influencing public policy is an important avenue to achieve your goals, how do you go about it? We recommend the following five steps:

Step 1:

Establish Policy Goals

As with all planning exercises, it's critical to begin by answering the question, "What do we want?" Think about how public policy fits into your organizational goals. Which of your organizational issues most requires public policy change? How would you prioritize them? What does your community need most? Use those priorities to identify which policy goal(s) you have the capacity to pursue. For example, a policy goal might be "increase access to healthy food," or "expand workforce training programs." Keep in mind that one goal might be plenty!

Whatever goal you identify, make sure it's a "SMART" one.

Example: Increase access to healthy food for low-income children by 30% by the end of 2020. SMART goals are:

- ▶ **(S)pecific:**
Include as much detail as you can about what you're trying to achieve, among whom, and when.
- ▶ **(M)easurable:**
Think about including metrics like the percent of change or the number of times you will do something in your goal.
- ▶ **(A)chievable:**
Set yourself up for success by setting realistic goals.
- ▶ **(R)elevant:**
Make sure your goal is about public policy rather than, for example, fundraising or academic outcomes.
- ▶ **(T)imed:**
Include a specific date for completion of your goal. It might change but having a timeline will keep you focused on policy priorities and help you manage resources.

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Step 2:

Understand the Landscape

What's the context in which you are working to achieve your policy goals? In other words, who will support or oppose your work, who is already working on the issue, and what strides have been made so far?

Target Audiences

Who are the target audiences? These could include formal decision-makers like elected officials, and informal ones, such as legislative staff, faith leaders, or the editorial board of your local newspaper.

Understand where your target audiences stand on your issue. Are they active supporters or do they work against your policy goal? Consider whether you have a relationship with these audiences or would need to cultivate one. Use the table below to capture this information.

Name and title	Role	Stance	Connection
<i>John Doe, city council member</i>	<i>Formal decision-maker</i>	<i>Supportive</i>	<i>Sally Smith, VP of government affairs</i>

Prioritize! Which audiences are most important to helping you achieve your policy goal? Rank them in order of importance so you can allocate your resources and time spent engaging each accordingly.

Connect Early

If you already work closely with target audiences through coalitions or other work groups, we recommend connecting with them early in your planning process and perhaps inviting them to offer feedback on where your resources would be most helpful to achieve shared goals. This positions you as a good-faith partner if they are already involved in public policy.

Make a list of organizations and individuals already engaged in public policy with whom you want to connect:

1. _____
2. _____
3. _____
4. _____
5. _____

External Factors

Consider external factors that will influence success, such as the political climate and public discourse. For example, if you are pushing for a progressive policy change within a conservative-led body of government, expect a longer timeline and a higher level of effort. On the other hand, if there has been a lot of attention on your issue in the news lately or an unlikely champion suddenly has an interest in your issue, it may be a good time for you to propose a policy solution and gain traction. Spend some time identifying the potential opportunities and threats that might influence your hoped-for policy outcome.

Step 3:

Choose Strategies

There are many strategies you can choose to pursue your policy goals. Some common strategies are identified and explained below. For each of the relevant strategies outlined below, ask yourself:

1. Will this help us reach our policy goal?
2. Who would be the target audience for this strategy?
3. Does this strategy make sense given what we know about the target audience and landscape?
4. Do we have the capacity to deploy this strategy?

▶ **Advocating to government.**

There are various ways to do this. Click [here](#) for a fact sheet with details on the types of lobbying and relevant restrictions for nonprofit organizations. Ultimately, lobbying is the most direct way to influence policy because you are asking elected officials and government agencies to change policies in a specific way. This doesn't mean solely legislation—you may also advocate to change regulations that govern how things are done and funded.

▶ **Working in a coalition.**

Coalition efforts can be very successful since they allow organizations to combine resources and achieve strength in numbers. Based on your earlier research, you now better understand what coalitions already exist for your issue. If none do, your strategy could be to [form a new coalition](#).

▶ **Educating informal decision-makers and/or the public.**

This is a less direct route to making policy change and one you likely already do on your issues. You may consider, however, refining your messaging and materials to emphasize public policy and clarify organizational policy priorities. Tactics within this strategy may also focus on [educating members of the media](#), who serves as informal decision-makers.

▶ **Pursue [Voter registration](#) and get out the vote (GOTV) efforts.**

This can be a resource-intensive strategy and makes the most sense if you have a good deal of time to make change and are comfortable with a long-term approach. You will need to give careful thought to whether voter turnout is a meaningful lever for achieving your policy goal.

Step 4:

Create an Action Plan

It's time to get to work! An action plan helps organize individual activities and tasks (tactics) that need to be completed to achieve your policy goals. For your action plan, be sure to not only list action steps, but also determine who is responsible, the timeline/deadline for each action, the resources and support required (including materials), and how you'll know if the action was successful.

Step 5:

Measure Success

Now that you have an action plan, how do you know if it is helping you achieve your public policy goals? Tracking the process and completed tasks is a fairly simple way of looking at your progress. This includes things like the type, number, and frequency of outreach, and the results of these activities. Taking time to ask evaluative questions can also provide valuable information. Real-time feedback from partners and staff about what is and isn't working can help guide or change your approach as needed.

At the end of your project, or at specific intervals, assess whether your actions have helped you achieve the policy goal set forth at the start of your work. It is often hard to directly tie the tactics to an outcome, but it will help to be able to look back and review what you did and when against a timeline of relevant activities. You may explore formal evaluation research methods like survey and focus group research to understand if and how knowledge, attitudes, and behaviors are changing among members of your target audiences.

Your specific approach to evaluation will depend on your policy goal and action, but be thoughtful in making sure every piece of data you collect helps you assess whether your efforts are yielding sufficient return on investment (i.e., helping meet your goal). It is also important to keep in mind that you will need to frequently adapt how you evaluate success to account for unexpected internal and external shifts. Revisit the evaluation components of your plan often and make updates as needed.

Not sure public policy is the right course for your organization? Contact us:

info@advocacyandcommunication.org and check out our website for more policy-related tools at advocacyandcommunication.org