

Building Strategic and Impactful Policy, Systems, & Environmental Change Efforts Planning Guide

Deliberate and thoughtful campaign planning is an essential element of any successful policy, systems and environmental change effort. Effectively recruiting, engaging and building the leadership skills of diverse groups of grassroots and grassroots supporters, effectively utilizing the collective power of your coalition, strategically engaging the media to highlight your issue, and effectively engaging decision-makers to support your PSE change efforts are just some of the elements of a campaign your coalition will need to become skilled at performing. This guide can be a helpful tool as you and your coalition think through and plan how you will advance your community change efforts.

SEVEN KEY PLANNING AREAS and GUIDING QUESTIONS:

1) Health Equity Impact

How are we addressing or highlighting health equity issues in our campaign?

How are those most impacted by our PSE change efforts being brought into the visioning, planning and execution of this community change effort?

- How are we identifying current and future opportunities to build relationships with new communities and populations
- Has your team identified tangible and intangible barriers to involving those groups in your campaign from the beginning like meeting times, inaccessible meeting space (both location and handicap accessibility), team culture, etc?
- Deliberate consideration is needed to begin to dismantle health inequities. Has your team thought about how you can utilize campaign activities and/or strategic events to build relationships with populations in your community facing health inequities? Constant consideration of "Does this action, activity, process build bridges or build walls?" is needed to authentically engage populations that have been historically marginalized.
- Do you have the right people around the table for planning a successful campaign that is representative of your community?
- Who will be interested in participating in your campaign and who won't? Have you considered why a possible target population may not participate in your campaign?

2) Information Gathering

What information do you need to make your campaign successful and advance your PSE change efforts?

- What facts do you need about your issue and your proposed PSE change that will resonate with people? What health & community data do you need to educate your community and decision-makers about the problem (i.e. local statistics, talking points)? Who is the voice of your issue? Who are your messengers and what are your key messages?

- Who opposes your PSE change efforts? What are their major objections? How will you counter their objections?
- How much do you know about your media's support for your issue? What has been their coverage history of your issue?
- Who are the key community players who have influence in your community (supportive and opposed)? How can they be recruited to support your efforts?

3) Building and Growing Your Coalition

What organizations share your mission and what is their potential role in your campaign? How will you recruit and involve them?

- Is there an existing coalition working on your issue or PSE change? Which organizations belong to this coalition that would be interested in partnering on your PSE change efforts?
- Do you have partners that include organizations that represent people who are impacted most by your issue or your community change efforts?
- What other organizations and businesses are in your community that could be recruited to support your issue or PSE change efforts? What organizations share your campaign strategies? Is there an opportunity to invite new partners or engage an old one who may have dropped off?
- How will you provide opportunities to build new skills within your coalition members and partner organizations? List a few examples of what these opportunities are. How will you engage them and what will you ask them to do?

4) Fundraising & Development:

Are you sharing information with past, current and prospective funders of this and other community PSE changes? How can you incorporate fundraising into your campaign? How will you utilize the influence of your funders to advance your PSE change efforts?

- Do you have a campaign budget? What types of campaign activities will you utilize and how will you fund them?
- Which local foundations, businesses, etc. might help fund your PSE change efforts?
- What in-kind donations might partner organizations contribute? (Printing, mailing, meeting space, food for meetings / events, cooperative advertising, etc.) Is there a group you should ask this year that might say yes next year?
- Which organizations and/or businesses might find a public-private partnership appealing & marketable?

5) Developing and Growing Community Support: Grasstops & Grassroots

Who is your core constituency and how can you get access to them through your campaign? How will you recruit and engage those broader groups of potential supporters in your community?

- How can you engage grassroots groups in your PSE change activities? What are the opportunities to recruit new supporters of your campaign?
- Have you identified opportunities to build the leadership skills of your key supporters? How will you actively engage your supporters in your PSE change efforts?

- What methods will you use to reach key community leaders to support or participate in your campaign?
- How are you collecting grassroots supporter contact information throughout your efforts?
- What training opportunities are you providing your key supporters to grow their leadership skills and confidence in representing your campaign (spokesperson training, issue messaging training, database management, LTE letter writing, events planning, etc)?
- How will you connect your grassroots and grassroots supporters to the decision-makers you are trying to influence?

6) Media and Communications

How will you get your issue and PSE change efforts covered in the media?

- Identify your media outreach strategy for your campaign. How will you engage traditional media and non-traditional media outlets such as churches, community newsletters, etc? Do you have a complete and up-to-date media list? How strong are your relationships with the media? (Political reporters, health reporters, editors, etc.)
- If doing paid media how will you integrate the paid media campaign with your earned media activities for your campaign?
- Who will be the spokesperson/people for your PSE change efforts? Do you have a training plan for your spokesperson/people?
- What are your deep media strategies for earned media, paid media and generating your own media? How will you utilize the formal and informal communication mechanisms of your community? How do you plan to expand your reach to those communities that are most impacted by your issue or your PSE change efforts?

7) Decision-Maker Advocacy

How will you engage and influence the decision-makers key to the success of your PSE change efforts?

- Who are the key decision-makers in your community? What do you know about them?
- How will you get access to them? How will you influence them to support your efforts
- How will you engage your decision-makers in your campaign efforts?
- How will you create decision-maker champions or engage those decision-makers who are already champions of your issue and PSE change efforts?