

Public Policy Planning Checklist

Organizational planning

- Convene a special board member dedicated solely to the issue of advocacy and public policy. Discuss ways to both advance and protect your organization's mission through advocacy at the state or local level. Appoint someone to come back a month later with a board resolution declaring your organization's long-term commitment to advocacy and public policy, and explaining why. Provide advocacy training for your board and staff. See "[Connect the Dots.](#)"
- Dedicate one staff person or volunteer to work at least 3 hours per week on public policy issues and building relations with government. See "[Make a Difference for Your Cause in 3 Hours Per Week,](#)" by the Center for Lobbying in the Public Interest (now part of the National Council of Nonprofits).
- Gather lists of potential allies including constituents, clients, donors, board members and people in the community that support your organization and might be a source of volunteer action in your advocacy and public policy work.
- Don't feel like you have to do this alone. The best way to get help and learn what the hot issues are in your state is to [join your state association of nonprofits](#). And through your State Association, by uniting together with other nonprofits, you can provide the meaningful leadership your community needs.

Issues planning

- Identify the laws, regulations, and external policies and practices that affect the work of your organization. Make three lists: (1) those that are preventing you from advancing your mission, (2) those that could threaten your ability to advance your mission, and (3) those that if put in place would leverage your work to help you achieve your mission.
- Write a paragraph about what life would be like for your organization/community if public policy were changed in your favor.
- Identify the government officials that have influence over the laws and regulations that affect the work of your organization.
- Identify the government officials, business leaders, community leaders, and opinion leaders that have influence over the laws and regulations that affect the work of your organization.
- Contact other groups, such as [your state association of nonprofits](#) or associations in your subsector/field of service, to put you in contact with others who work on public policy issues of interest to your organization.

Funding resource planning

- Identify part of your organization's general operating support that may be used for lobbying and set aside a portion for advocacy and public policy related activities.
- Make sure your organization has taken appropriate legal steps necessary to simplify the compliance and reporting by electing to use the free and easy [501\(h\) expenditures test](#) for 501(c)(3) charitable nonprofits under the Internal Revenue Code.

- If you will be engaging in legislative lobbying, determine if you need to register as a lobbyist or file as an organization that lobbies with the appropriate state or local government office that regulates lobbying activities.
- Become familiar with the basics about advocacy and lobbying [using foundation grant funds](#).

Board, staff, and volunteer planning

- Discuss at the board and staff levels, as well as with volunteers, how current laws, regulations, and external policies and practices that affect the work of your organization might be changed to help advance your mission and services.
- Use the three-part list of the laws, regulations, and external policies and practices that affect the work of your organization – (1) those that are preventing you from advancing your mission, (2) those that could threaten your ability to advance your mission, and (3) those that if put in place would leverage your work to help you achieve your mission – to engage your board, staff, and volunteers in a discussion of the connection between key public policy issues and the needs of your constituents and programs.
- Review your nonprofit’s overall strategic plan and identify how changes in public policy may affect the goals and direction of your organization.
- Review your mission statement and values. Develop a crisp and clear explanation on how advocacy and working on public policy issues connect to the beliefs and goals of your organization and will advance your mission.
- Form a small committee of staff, board members, clients, residents, and other volunteers to discuss and plan appropriate next steps in advocacy and public policy.

Action planning

- Use “[Make a Difference for Your Cause in 3 Hours Per Week](#)” as a reference tool for carrying out activities.
- Attend a coalition meeting with organizations that share your concerns to discuss the problem and plan how collectively you can work together to inform and better shape public policy.
- Schedule brief meetings with your city, county, state and federal legislators as appropriate to discuss the policy changes you and your coalition are seeking. Bring a board member and a person that receives benefit from your services with you.
- Follow through on the next steps from meetings with legislators or other government officials. Keep the pressure on to schedule a meeting.
- Contact the [state association of nonprofits in your state](#) for further assistance or to answer questions.