

Public Policy Planning Checklist

Infrastructure planning

- 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.
- Identify office space, computer, printer, copier, telephone and email address that may be used for lobbying and other public policy activities.
- Prepare a section of website for description of key public policy issues.
- 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 public policy and lobbying work.

Issues planning

- Identify the current and future needs from government as it fulfills its mission.
- Identify the laws, regulations and public policies that affect the work of your organization.
- Identify the government officials that have influence over the laws and regulations that affect the work of your organization.
- Contact associations in your field of service to put you in contact with someone who works on public policy issues of interest to your organization.
- Identify how current laws and regulations might be changed to help your mission and services. Write a paragraph about what life would be like for your organization/community if public policy were changed in your favor.

Funding resource planning

- Identify part of your organization's general operating support that may be used for lobbying and set aside a portion for public policy and lobbying related activities.
- Make sure your organization has taken appropriate legal steps necessary to lobby including taking the [501\(h\) lobby election](#) by 501(c)(3) organizations under the Internal Revenue Code. Determine if you need to register as a lobbyist, or file as an organization that lobbies with the appropriate state government office that regulates nonprofits, i.e., the Attorney General's office, or the IRS. See CLPI materials for more information.

- Become familiar with the basics about lobbying and public policy activity using foundation grant funds. See “[Four Important Facts About Lobbying with Foundation Grant Funds](#),” by the Center for Lobbying in the Public Interest.

Volunteer and Board planning

- Based on your issues planning, prepare to engage the board and key volunteers in public policy work vital to the services you provide.
- Use the discussion guide with the video to engage your board in a discussion of the connection between key public policy issues and the needs of your constituents and programs.
- Review your 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 rationale for working on public policy issues that connect to the beliefs and goals of your organization.
- Form a small committee of staff, board members, clients, residents and other volunteers to discuss and plan appropriate next steps in the public policy arena.

Action planning

- Use “[Make a Difference for Your Cause in Three Hours Per Week](#),” by the Center for Lobbying in the Public Interest as a reference tool for carrying out activities.
- Attend a coalition meeting or convene a meeting of organizations that share your concerns to discuss the problem and plan how, collectively you can work together to 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 your state association of nonprofits at <http://www.ncna.org/> or the Center for Lobbying in the Public Interest <http://www.clpi.org/> for further assistance or questions.