



Change AGENTS Policy Action Checklist

This checklist has been developed as a supportive tool for the Change AGENTS policy change projects. The checklist identifies actions that might be necessary to complete the change project, regardless of the current stage of the change project (research, strategic thinking, coalition building, education/advocacy, etc.). It can also be used to track progress and plan next steps.

Identify and Frame the Policy Issue	
	<ul style="list-style-type: none"> <input type="checkbox"/> Identify the problem and possible solutions. <input type="checkbox"/> Gather data, stories, and supporting evidence of the problem and solution. <input type="checkbox"/> Frame your issue or practice change in jargon-free language. <input type="checkbox"/> Work on message development – problem/solutions/local angle. <input type="checkbox"/> Write and practice an “elevator speech.” <input type="checkbox"/> Create a one-pager that tells the economic, social and personal story about the issue. <input type="checkbox"/> Brainstorm who could become a champion or leader on the issue.
Educate Yourself	
	<ul style="list-style-type: none"> <input type="checkbox"/> Understand the basics of the legislative and regulatory processes. <input type="checkbox"/> Research laws or current legislation related to your topic (federal/state). <ul style="list-style-type: none"> ○ Has your policy been introduced before (federal/state)? ○ Who are the current and past champions? ○ Identify stakeholders responsible for your policy change. <ul style="list-style-type: none"> ▪ What kind of value does your intervention provide? ▪ Do they care about that value? <input type="checkbox"/> Research the relevant legislative committees involved with the topic. <ul style="list-style-type: none"> ○ Identify the key legislative players (federal/state). <input type="checkbox"/> Research state or federal regulations related to policy change. <ul style="list-style-type: none"> ○ Identify departments, offices, or agencies that enforce those regulations (federal/state). <input type="checkbox"/> Look into the politics of the issue: who supports/who opposes?
Strategic Advocacy and Coalitions	
	<ul style="list-style-type: none"> <input type="checkbox"/> Identify key stakeholders (federal/state). <input type="checkbox"/> Develop partnerships with individuals/organizations related to your issue. <input type="checkbox"/> Find a coalition to support your cause. <ul style="list-style-type: none"> ○ If no coalitions relate to your issue, consider creating your own



	<p>coalition, task force, work group, or committee.</p> <ul style="list-style-type: none"> ▪ Involve an allied organization on a joint campaign. <p><input type="checkbox"/> Build alliances among unlikely or unexpected allies.</p>
<p>Contact Your Elected Official</p>	
	<ul style="list-style-type: none"> <input type="checkbox"/> Set up meetings. <ul style="list-style-type: none"> ○ E-mail or call your legislator’s office. ○ Ask to meet with a staff member who covers your issue (ex. aging, health, Social Security, etc). ○ Provide a brief background on issue and provide bill number (if available) <input type="checkbox"/> Consider inviting your allied organizations to the meeting. <input type="checkbox"/> Prep for your meeting <ul style="list-style-type: none"> ○ Review and rehearse the key points you want to make. ○ If multiple people are joining the meeting, decide in advance who will be the spokesperson for the group. ○ Bring multiple copies of your handouts. <input type="checkbox"/> Visit your elected official. <ul style="list-style-type: none"> ○ Identify yourself, state where you live, and your affiliations. ○ Explain primary purpose of meeting ○ Use personal and local examples to emphasize the importance of the issue. ○ Ask how your lawmaker stands on the issue. ○ Ask for the official’s support for the change effort. <input type="checkbox"/> Send a follow-up “thank you” e-mail/note to the staff member. <ul style="list-style-type: none"> ○ Include electronic versions of your handouts in your e-mail.
<p>Strengthen Your Base of Support</p>	
	<ul style="list-style-type: none"> <input type="checkbox"/> Organize a media campaign (ex. write op-eds, letters to the editor, press releases, or post a blog about your issue) <input type="checkbox"/> Coordinate a grassroots action campaign. <ul style="list-style-type: none"> ○ Have your organization’s members write, call or visit their legislators. ○ Create action alerts. <input type="checkbox"/> Use state and local leaders (grass tops) to support your effort. <input type="checkbox"/> Develop a white paper using the results of evidence-based research, data, and/or policy analysis to support your effort. <input type="checkbox"/> Host a briefing or forum on the issue. <input type="checkbox"/> Work with coalitions if possible.



Advocacy at Home	
	<ul style="list-style-type: none"><input type="checkbox"/> Continue to track your issue.<ul style="list-style-type: none">○ Use www.congress.gov○ You may also use the Government Printing Office website www.gpoaccess.gov,<input type="checkbox"/> Continue to communicate with your legislators and their staff.<ul style="list-style-type: none">○ E-mail or call your legislator’s office.○ Develop lasting relationships with your legislators by contacting them every month or two with progress reports and helpful information.○ Sign up for their e-newsletters.○ Connect with them via social media (“Like” their Facebook pages and follow them on Twitter)

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