



Chapter 4

Action Plans to Educate Policymakers



Chapter Learning Objectives

As a result of using this chapter, you will be able to:

- 1. Define an action plan and its components.
- 2. Discuss the benefits of creating an action plan.
- 3. Identify tools for developing an action plan.
- 4. Create an action plan.
- 5. Implement it, with updates as needed.
- 6. Use the action plan to:
 - Teach others how to effectively educate policymakers on chronic disease issues.
 - Document your health promotion policy expertise to policymakers and key stakeholders.

Educating policymakers is an ongoing process in an environment in which other stakeholders are actively demanding attention too.

To increase the odds of achieving your policy objective, we recommend creating an action plan to educate policymakers.

What Is an Action Plan to Educate Policymakers?

Action plans specify the connections between proposed actions and your specific short-term, intermediate, and long-term policy goals. Actions include both directly promoting your policies and taking steps to address potential opposition. The diagram also specifies tools, resources, and partners needed.

Action plans not only guide your efforts to educate policymakers, but also provide a . See the examples in .

What Are the Benefits of Creating Action Plans?

Without an action plan, it can be tempting to react to day-to-day changes in the policy landscape. The result can be a scattershot approach that requires a lot of effort but achieves little.

The process of formal planning helps you:

- Refine goals and objectives.
- Clarify linkages between potential strategies and actions and the goals.
- Identify resource needs and partners.
- Prepare to minimize opposition or counterarguments.
- Engage partners.
- Focus implementation.
- Establish your credibility with other stakeholders.
- Evaluate your action plan.

What Are the Main Action Plan Components?

The SOPHE template (see Planning Tools sidebar and image below) will guide you in developing your action plan to educate policymakers. The main components are:

- Goals: overall, intermediate, and short-term
- Resources: assets
- Support and opposition (sources of)
- Targets (people) and partners
- Strategies
- Action Steps (access points and tactics)
- Evaluation
- Status/Comments

In the next subsections, we give tips for each component starting with the goals column (far left) in sequence to status/comments column (far right). As you progress in planning, revise existing content in prior columns as needed.

Name: _____State: _____

Society for Public Health Education

|ACTION PLAN FOR EDUCATING POLICYMAKERS

Risk Factor/Disease/Chronic Condition:

Overall Goal:

Overall Strategy:

Intermediate Goals	Resources & Assets	Support/ Opposition	Targets/ Partners	Strategies	Action Steps	Evaluation	Status/ Comments

Planning Tools

Action Plan Template

(SOPHE)

Common Language: The Composite Logic Model (Innovation Center):

http://www.innonet.org/index.php?section_id=6&content_id=637

Developing an Action Plan in The Community Tool Box (University of Kansas):

<http://ctb.ku.edu/en/default.aspx>

Effective Advocacy at All Levels of Government (W.K. Kellogg Foundation):

<http://ww2.wkkf.org/advocacyhandbook/index.html>

Nuts & Bolts (Center for Lobbying in the Public Interest):

<http://www.clpi.org/nuts-a-bolts>

Overall Goal and Strategy

Using the policy objective you developed (), complete the top of the plan template by describing the:

- Risk factor, disease, or chronic condition about which you want to inform policy-makers.
- Overall goal for your policy education campaign, using SMART objectives ().
- Your overall strategy.

Name: _____
State: _____

Society for Public Health Education
ACTION PLAN FOR EDUCATING POLICY MAKERS

Risk Factor / Disease / Chronic Condition:

Diabetes (type II, formerly adult onset)

Overall Goal:

By May 2011, policymakers in [State/Locality] will be informed of the economic impact of diabetes and evidence-based policies that can prevent diabetes and reduce complications.

Overall Strategy:

Educate key stakeholders on issues surrounding diabetes to shift the policy discussion away from treatment (reactive) and toward evidence-based prevention policies (proactive).

Intermediate Goals	Resources & Assets	Support/ Opposition	Targets/ Partners	Strategies	Action Steps	Evaluation	Status/ Comments

We'll build on this goal and strategy in subsequent examples.

Intermediate and Short-Term Goals

Develop intermediate (perhaps a 1-2 year timeframe) goals that directly support progress toward the overall goal for educating policymakers. Intermediate goals can represent key milestones, such as media penetration, targets for public opinion polls, or a public hearing on your issue. As needed, add rows to the table in the template.

Short-term goals should build toward intermediate goals. They could be outputs relating to numbers of target audience reached, number of partners trained, or new organizations joining your coalition.

Your goals should be measurable, realistic, and attainable within the timeframe you specify. See sidebar for examples.

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Examples

Intermediate Goal:

In one year, 15 individuals will have been trained to effectively educate their state legislative representatives on evidence-based diabetes prevention policies.

Short-term Goal:

By July 2011, a partnership will be built with our local American Diabetes Association chapter.

Examples

Resources and Assets

- Members of the American Diabetes Association
- Funding for webinar hosting program
- Advocacy training tools on the SOPHE Chronic Disease Policy website: <http://www.sophe.org/chronicdiseasepolicy/index.cfm>

Resources and Assets

For each intermediate and short-term goal, list the primary resources available to help you accomplish that goal. Listed items could be general or specific.

- General: coalition members’ skills, government partners, potential grant from foundation
- Specific: local health data, Dr. Smith at state university school of public health, vice chair’s offer of in-kind media relations assistance, Greenville’s health fair on May 10

Consider a range of assets or resources.

- Financial: coalition members’ dues, a grant, or an in-kind donation that reduces future expenses
- Tangible: public library as optional meeting space, space on monthly school lunch menus for health promotion messages, summer intern working toward MPH degree
- Intangible: Mayor Garcia’s invitation to meet, midtown neighborhood, ideas on CommunityCommons.org, your organization’s capacity (or power) to act

Also, list resources and assets needed, such as local data needed on number of people on dialysis in community. The needs could be flagged with a different font or other notation. Make plans to obtain them.

Intermediate Goals	Resources & Assets	Support/ Opposition	Targets/ Partners	Strategies	Action Steps	Evaluation	Status/ Comments

Short Term Goals	Resources & Assets	Support/ Opposition	Targets/ Partners	Strategies	Action Steps	Evaluation	Status/ Comments

Support and Opposition

Identify organizations or even individual leaders who are supportive of an intermediate or short-term goal. You could also include important stakeholder groups or coalitions.

Then write down stakeholders, organizations, or individual leaders that could oppose your goal. When possible, list the reasons why they oppose your evidence-based policy, and then develop your strategy to minimize dissent.

You can use a different font or notation to differentiate between supporters and opposition.

If your action plan will be shared, consider using more generic terms to refer to specific organizations and individuals that are not on public record as supporting or opposing your goal. Embarrassment and diminished credibility are reasonable risks if people outside your immediate confidants gain access to an action plan that specifies names.

Intermediate Goals	Resources & Assets	Support/ Opposition	Targets/ Partners	Strategies	Action Steps	Evaluation	Status/ Comments



Short Term Goals	Resources & Assets	Support/ Opposition	Targets/ Partners	Strategies	Action Steps	Evaluation	Status/ Comments

Examples

Strategies:

- Hold a webinar training for partners on educating state health policymakers about evidence-based policies that have been successful in reducing rates of diabetes.
- Use annual release of state KIDS COUNT data to publicize the impact of diabetes-related health disparities via coalition members’ media relations.
- Sponsor exhibit at county fair to educate the public about diabetes and coalition membership.

Examples

Targets:

- Metro Digest’s health reporter
- Legislative health committees
- Community members
- Local NAACP
- Fairtown taxpayers

Partners:

- American Diabetes Association
- Columbus county health department
- Community clinics
- Maya (youth advocacy group)

Targets and Partners

Identify and list targets that are important to obtaining each goal. As relevant, include specific people or leadership positions. Other targets might be organizations, coalitions, audiences, or stakeholders. Think about not only audience(s) that you want to educate directly, but also targets that would be effective messengers for educating policymakers. Be sure to also identify existing partners and ones that could support your goal.

For both targets and partners, remember to think about non-traditional partners, such as faith-based groups, students or retirees, influential bloggers, and civic networks. about building and sustaining coalitions.

Name: _____

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State: _____

ACTION PLAN FOR EDUCATING POLICYMAKERS

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Strategies

Strategies are access points to your targets and the means for accomplishing goals.

For each goal, create one or more strategies that you will pursue. The process requires using your partially drafted plan to:

- Consider the resources or assets that are available (or that you must obtain).
- Build on existing support and strategies that minimize opposition.
- Engage the targets or partners who are essential to success.

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Examples

Action Steps:

Action steps for a webinar training on educating state health policymakers about evidence-based policies:

- Identify effective diabetes prevention policies and compare to existing policy support.
- Collect resources to share with trainees.
- Obtain grant or ask partners for in-kind donations.
- Schedule webinar and invite expert speakers.
- Publicize webinar to target audience.
- Develop evaluation survey.
- Host webinar.
- Analyze evaluation results.

Action Steps

Break each strategy into a series of action steps in the next column. Some action steps may apply to more than one strategy. In the column of examples to the right, one step is getting expert speakers for your webinar training. After the training, you can build on this relationship and invite them to join your coalition.

Add due dates for each step so that your plan is concrete and you can track progress.

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Evaluation

Identify one to three evaluation measures that you plan to use to evaluate your work. Depending on the resources for evaluation, you can plan to measure process, outputs, or outcomes. Regardless of type of measure, make sure each evaluation item relates to the goal in that column.

See Chapter 3, _____ for additional guidance about evaluating your policy education efforts.

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Examples

Evaluation:

Upon completion of this webinar training, do you:

- Feel confident in your ability to effectively educate your state health policymaker on diabetes prevention issues?
- Plan to contact your state legislature regarding diabetes prevention issues?

Note the correspondence between our strategy (a webinar training) and our intermediate goal (In one year, 15 individuals will have been trained to effectively educate their state legislature on evidence-based diabetes prevention policies).

Examples

Status/Comments:

- Webinar plans are set
- One week after training, send participants some tools to support outreach

Status/Comments

When you initially develop your action plan, leave this status/comments column blank. Alternatively, if you have peers review your action plan, encourage them to provide feedback in this area.

Every two months (or other timeframe), review your progress and make notes in the Status/Comments cells. Keep your partners informed by sharing your updated action plan.

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Short Term Goals	Resources & Assets	Support/ Opposition	Targets/ Partners	Strategies	Action Steps	Evaluation	Status/ Comments

How Do I Implement My Action Plan?

Before Finalizing, Seek Reviews

Now that your action plan is drafted, ask key partners to review it. Their suggestions may help you discover a new opportunity, connect with a new stakeholder, or avoid a pitfall. Further, the mere request for review helps nurture buy-in to your overall approach and plans. By incorporating partner feedback into a plan revision, you signal a sincere interest in collaborating.

Follow the Plan

During implementation, the action plan provides a step-by-step roadmap for your policy education efforts. Use it as such. Enter the steps into your calendar, task manager, or project management platforms.

Update the Plan

View your plan as a work in progress because it will need periodic updating as the policy landscape evolves . Continuously scan for changes in public sentiment and emerging opportunities, then reflect these changes within your plan. For example, build in flexibility to respond to a policymaker’s office or a journalist needing information in a hurry. In short, effectively educating policymakers requires some fluidity in your plan. Update it regularly and keep it current.

(See also Status/Comments page.)

Further Leverage the Plan

The action plan itself is useful in two additional ways. First, developing an action plan requires skills and knowledge; thus, other people will view the plan as documentation of your health promotion policy expertise.

Second, use your action plan as a tool for teaching others about how to effectively educate policymakers about chronic disease issues.