

How to Use this Resource

This resource provides background on civic and policy engagement as an approach to health equity. Use this resource to understand the foundational concepts and strategies for implementing practices to increase individual, community, and organizational civic engagement practices in your health equity work.

For more context on civic and policy engagement and health equity

To maximize benefits of this resource, Partners for Advancing Health Equity (P4HE Collaborative) recommends reviewing the level-setting resources provided to participants during this workshop series. For more background information on engagement with policy and civic processes, see [Approaches for Health Equity: Policy and Civic Engagement](#).

Level Setting

New to civic and political engagement?
Below are level setting resources recommended by the workshop facilitator and authored by the P4HE Collaborative.

Facilitator Recommendations

- › [Mississippi Black Women's Roundtable](#)
- › [Engagement Ladder Theory](#)
- › [MSBWR 2025 Legislative Agenda](#)

P4HE Resources

- › [P4HE Level Setting Dialogue: Political Engagement](#)
- › [P4HE Resource Spotlight: Political Engagement for Health Equity](#)
- › [P4HE Blog: Political Engagement in Action](#)
- › [P4HE Podcast: Bridging Policy and Health](#)
- › [A Call for Continued Collaboration](#)

Have a resource you would like to share on this topic?

- › Recommend resources and topics [for our library](#)

Workshop Focus

The Partners for Advancing Health Equity Collaborative hosted a three-series workshop sprint on advancing health equity through policy and civic engagement led by Cassandra Welchlin, Executive Director of the [Mississippi Black Women's Roundtable \(MSBWR\)](#). MSBWR is an intergenerational statewide network with a mission to amplify the organizing power of Black women to shift power at the voting booth and the policy agenda to ensure their economic security.

› **Session 1:** speakers introduced key principles of grassroots organizing and coalition building. Speakers provided firsthand examples of MSBWR's efforts to organize individuals, communities, and organizations to mobilize for women's economic security within Mississippi.

› **Session 2:** speakers discussed the role of civic participation in systemic change with a specific focus on civic processes beyond voting (i.e. advocacy, policy influence, proactive organizing). Political engagement between distinct sectors and how to identify opportunities for cross-sector collaboration were shared.

› **Session 3:** speakers guided workshop participants throughout a question and discussion-based approach to developing a strategic planning framework for organizations interested in drafting concrete strategies for political and civic engagement within their sector.



Moving to Action

Below, we've summarized how to develop a strategic planning framework in order to be civically and politically engaged in pursuit of disrupting traditional approaches for health equity.

Strategic Planning Framework

A strategic planning framework is a structured approach used by organizations to define priorities, determine action steps in line with defined priorities, plan the allocation of required resources, and ensure that partners are working towards their common goals. Developing a strategic planning framework helps organizations interested in civic and policy engagement systematically identify the needs of a community, set clear goals for engagement, and develop actionable plans to encourage meaningful civic participation and drive positive social change.

› Set Long-term Goals for Engagement

The first step in developing a framework to approach community partnerships for civic and political goals is identifying long-term engagement goals for the organization. This action step prioritizes the key outcomes for an organization and starts the process of identifying what short-term and long-term action steps are needed to progress towards broader organizational goals. To identify these long-term goals, consider:

- › What are our long-term goals for engaging the community?
- › What are we hoping to see happen, and on what timeframe?
- › What will success look like?

Examples of long-term goals for community civic engagement may include examples such as the following:

- › Achieve more active constituents in a low-participation state with respect to voting and policy.
- › Develop resilience and empowerment within an identified community.
- › Expand access to healthcare.

These long-term goals set expectations for organizations to collectively work towards, despite the fact that different members of the organization may be conducting different kinds of work to achieve them. This encourages a shared vision of the organization's future and allows for the development of concrete strategies to implement in order to achieve long-term goals.

› Identify Specific Strategies to Build Power and Influence Policy

Once an organization establishes long-term goals for civic and policy engagement, it can begin developing strategies to achieve these goals. To identify these strategies, it can be useful to think about your long-term goals and ask the question **“What specific actions can be taken in the next 6 months to progress towards this goal?”**. Responses to this question will identify immediate action steps that organizations can pursue. Once identified, organizations can determine what follow



up actions are feasible. For example, organizations that are new to the political and civic engagement space may respond to this question in the following way:

- **Goal:** To have a clear baseline understanding of what we need and want, and what our partners need and want.
- **Immediate Actions:** Internal meetings with staff to co-develop a list of needs and wants, meetings with partner organizations to discuss their needs and wants.
- **Follow up Actions:** Develop an engagement action protocol that meets the needs and wants of each party, to the extent possible.

This resource outlining the [Engagement Ladder Theory](#) can help you identify the different levels of engagement you're your organization may be at or ready for in relation to long-term community mobilization.

Other examples of follow up actions in pursuit of long-term goals may include:

- Develop safety plans and processes for an organization interested in community events.
- Establish cultural relevance and significance within the community by meeting with community members in their spaces and through formal focus groups.
- Develop Memorandums of Understanding (MOUs) and principles of engagement.

➤ Identify Barriers and Courses of Action to Address Challenges

To adequately advocate with and mobilize marginalized communities, it is essential to be proactive in identifying existing and emerging barriers to civic and political engagement. Ask the question **“What challenges might we face when working towards these goals, and how can they be solved?”** Beyond an awareness of the pre-existing intersectional challenges that may face a marginalized community (e.g. access to affordable healthcare, food deserts, wage inequality, etc.), it is important to build structures that allow for community members to express the barriers they face to political and civic engagement. For barriers that may seem too large or out of scope for your organization, it is key to collaborate with partners for their direct assistance or referrals to other potential partners.

Examples of identifying barriers and a course of action to address them include the following:

- MSBWR frequently heard during community events that individuals were interested in their bootcamps and higher-commitment leadership programs; however, expenses, such as childcare and transportation, were a barrier to participation. To address this challenge, childcare was provided for program participants on-site at no cost.
- Communities that don't speak English as a primary language may experience reduced civic engagement. To address this barrier, consider partnering with advocates from multilingual communities to help translate communications from your organization into multiple languages.

When identifying ways to address barriers and challenges, consider:

- What resources or partnerships do we need to reach our community engagement goals?



- Are we providing resources that are tailored to the needs of the community, rather than a one-size-fits-all approach?
- What opportunities can we provide to ensure community members have a space to provide feedback?

➤ **Measure Successes**

The last step in developing a strategic planning framework for civic and political engagement is to determine the metrics for measuring success within your organization. Defining success in civic and political advocacy will vary according to many factors such as an organization's area of expertise, political climate, and the scope of their long-term goals. While success will inevitably look different according to each organization, defining success and the key indicators of success play a pivotal role in measuring the degree to which political and civic engagement strategies are effective at achieving goals and determine when strategies may require new and/or refined action steps. When defining success metrics consider:

- How can we track progress towards short-term and long-term goals?
- What data points will indicate progress towards our goals (e.g., participation data)?
- What key milestones will serve as evidence of progress towards the achievement of our long-term goals (e.g. legislation passed to expand Medicaid coverage)?

As organizations develop standards of success and systems to measure success, it is essential to keep each of the other steps outlined above to ensure that metrics of success are reflective of long-term goals, manageable and measurable over time, and inclusive of how barriers to engagement may impact success.