





Scoring Sheet

Within each phase of the process, it is important that a trainer/coach has a fundamental understanding of the various “themes” or components in each phase.

 The first theme is that of the **theory**, or the “why”, behind each phase. These are ways of thinking that impact how we approach the work. For example, we can know how to do something (i.e. implementation), but if we’re not thinking with an equity mindset, the results may have a negative impact.

 The next theme is that of the **process skills** that are ideal for each phase. These are skills needed to help people work together to achieve your goal. These are things like understanding collective impact, facilitation, and conflict management.

 The third theme is that of the **technical skills** needed within that particular phase. These are skills needed to achieve the different tasks throughout each stage of the policy or systems change model being used. They are things like data collection, issue analysis, policy design, evaluation, etc.

 The last theme is that of **content competency**. This is knowledge related to the issue you are trying to address (i.e. substance abuse, food insecurity, housing, etc.), like understanding primary prevention, data aligned to issues, and systems change strategies.

Key

Areas You’re Confident in Coaching Around: ★

Areas You’re Not as Confident in Coaching Around: ?

Areas You’re Unfamiliar With/Need the Most Support Around: !

PRECONDITION PHASE:

Purple	• Systems change basics	
	• Collective impact (if applicable)	
	• Preconditions of collective impact	
	• Policy change and the CDC Policy Process (if applicable)	
	• Readiness for policy change and/or collective impact	
Yellow	• Systems change basics	
	• Issue analysis	
Red	• Primary prevention	

GETTING STARTED PHASE:

Purple	• 7 Types of power	
	• Mindsets and behavior change	
Green	• Defining a vision and purpose	
	• Community organizing	
	• Relational meetings (aka one-on-one meetings)	
Yellow	• Anti-oppressive facilitation	
	• Equity assessments	
Red	• Creating a community profile	
	• Data-based planning for effective prevention	
	• Values-driven community engagement	

GETTING ORGANIZED PHASE:

Green	• Coalition development and management (if applicable)	
	• Team development (storming, forming, norming)	
	• Group decision making	
Yellow	• Interest matrix (aka partner mapping)	
	• Resource scans	
Red	• Policy law (if applicable)	
	• Prevention strategies	
	• Community data informing possible prevention activities	

DEVELOP A PROFILE PHASE:

Green	• Conflict management and resolution	
	• Authentic Community Engagement (those affected by the issue are at the table and involved/in shared leadership in choosing policy approach/solution)	
Red	• Data-based decision making	
Yellow	• Power mapping	
	• Data sourcing and analysis	

	• Centering racial equity throughout data integration	
	• Gaps analysis	
	• Results-based accountability	

DEVELOP A PLAN PHASE:

	• Strategic planning	
	• Leadership development	
	• Selecting indicators and performance measures	
	• Policy analysis (what policy options are there in our chosen topic and which one is right for the unique community conditions)	
	• Policy scan (looking at local code vs. looking at policy options)	
	• Education policy, rules and laws from your organization around advocacy (if applicable)	
	• Local government structures and processes	

POLICY PASSAGE PHASE (Only applicable to policy change):

	• Building a public narrative and storytelling/building community buy-in	
	• Decision maker strategy (who is supportive and who isn't)	
	• Drafting best practice policy language	
	• Local policy process norms (Study session, 1st reading, 2nd reading and passage)	
	• Active advocacy and education at decision maker meetings	
	• Anticipating and planning for opposition	
	• Policy amendment	
	• Presenting and being a Subject Matter Expert (SME) at Decision Maker meetings	
	• Speaking and Organizing others to speak during Public Comment periods	

POLICY ENACTMENT PHASE (Only applicable to policy change):

	• Critical reflection	
	• Regrouping if policy did not pass on next steps to continue the work	
	• Policy enactment	
	• Process/plan for continued policy evaluation and assessment of efficacy	

IMPLEMENTATION AND EVALUATION PHASE:

	• Policy implementation	
	• Strategy implementation	
	• Qualitative and quantitative evaluation methods	
	• Continuous and emergent learning	
	• Local, regional and state-level data	

