

Organizational Influence Worksheet

Instructions

Take 5 minutes to reflect on your organization's current capacity, relationships, and opportunities for policy and advocacy engagement. Add your thoughts directly under each section. We'll review this together and discuss it as a group.

Stakeholders

List your organization's key stakeholders in each category. Describe the nature of your current relationship (e.g., strong, informal, new, needs improvement).

A. Board and Donors

- Key individuals or groups:
- Nature of relationship & policy expertise:

B. Grantees

- Who is currently funded and engages in policy/advocacy?
- Opportunities for support or collaboration?

C. Advocacy and Policy Organizations

- Current or potential partners:
- Existing or needed relationships:

D. Elected Officials

- Who do you/your leadership know?

- Relationship status (formal, informal, strong, new):

E. Peer Foundations

- Which peer organizations are active in policy/advocacy?
- Gaps or opportunities for collaboration?

Organizational Influence

Reflect on your organization's internal strengths and experience. Where do you already have relevant assets?

- Staff expertise in policy, advocacy, systems change:
- Past activities (e.g., convenings, research, public education):
- Unique voices, credibility, or resources:
- Gaps or areas for development:

Strategic Options & Activities

Review the three pathways below. For each, note where your organization is already active and where you see potential to do more.

A. Information Broker

- Current activities (e.g., research, reports, data, public education):
- Opportunities to expand:

B. Convener/Connector

- Current convenings, roundtables, or dialogue spaces:
- Opportunities to expand or deepen:

C. Taking Action

- Direct advocacy, lobbying, public campaigns, legal advocacy:
- Opportunities to expand:

Reflection:

After completing the exercise, respond to these prompts.

- What are our biggest strengths/assets for engaging in policy and advocacy?
- Where are our biggest gaps or blind spots?
- What opportunities excite us most, or feel most urgent?
- What questions or concerns do we have before moving forward?
- If you have already been doing advocacy and policy, what areas can be further developed?