

**[INSERT COMMITTEE NAME]  
WORKBOOKS**

# Each committee will hold weekly meetings from November to February to complete three key phases of work

<b>Phase 1: Foundation setting</b>	1. Setting a foundation 2. Theory of change	What are our objectives? How are we going to work together to produce actionable recommendations to generate impact all constituents can see and feel? How will each policy transform lives?
<b>Phase 2: Planning</b>	3. Policy levers 4. Action planning 5. Action planning	How could each policy be implemented, and through whom? What can we realistically (but ambitiously!) achieve? What key steps need to be taken, and in what order, to successfully implement each policy?
<b>Phase 3: Measuring</b>	6. Identifying key metrics	How will we measure our progress and tell the story of our success?
<b>Phase 4: Draft Report</b>	7. Reviewing Report	Provide a draft report to committee and solicit final feedback.

Set a deadline for Policy Committees to deliver final recommendations to the Transition Director in report format

# Meeting 1: Setting a foundation



## Meeting objectives:

- Ground our work in what we've heard from constituents
- Understand the committee's purpose and objectives
- Establish working groups and routines

### Pre-work:

- Review policy commitments from the campaign
- Read online input from constituents
- Pre-sort members into working groups based on policy expertise



### In-meeting activities:

- **Committee overview:**  
Facilitator to provide an overview of the committee's purpose, objectives
- **Committee structure:**  
Discuss working groups, roles and responsibilities and assigned policies; finalize members of working groups



### Expected outputs:

- Finalize working groups
- Provide committee members access to their workbooks

# Meeting 2: Understanding the theory of change



## Meeting objectives:

- Understand the theory of change for each policy and how they could transform the lives of all constituents
- Use the theory of change for each policy to ground future meetings in a shared understanding of policy goals

### Pre-work:

- Working group members to review the list of policies under their purview
- Read available background material on policies



### In-meeting activities:

- **Theory of change:** Working groups to discuss how each policy could transform the lives of constituents



### Expected outputs:

- Draft theory of change “if...then...” statements for each policy



## Post Meeting 2 output



Use the table below to draft your theory of change statements for each policy.

Policy	Theory of change statement <i>If we implement [X policy], then we will affect [X change] that will drive/grow/sustain [X impact].</i>

# Meeting 3: Mapping potential policy levers and key stakeholders

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## Meeting objectives:

- Map potential policy levers - (i.e., legislative, executive order, appointees, task forces, public-private partnership, etc.).
- Map the detailed implementation mechanism for each policy, identifying key stakeholders needed.

### Pre-work:

- Brainstorm potential levers and key stakeholders to discuss during the meeting
- Review feedback from constituents, if available



### In-meeting activities:

- **Policy levers:** Working groups to discuss feasible policy levers
- **Key stakeholders:** Working groups to outline how and through whom policies could be implemented



### Expected outputs:

- Recommend levers for each policy commitment
- Recommend implementation mechanisms for each policy



## Post Meeting 3 output

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Use the table below to indicate your recommended levers for each policy commitment.

Policy	Recommended levers	Key stakeholders and their roles	Potential risks

# Meetings 4-5: Action planning

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## Meeting objectives:

- Identify what short- and long-term actions need to be taken for each policy commitment.
- Draft a roadmap of the first moves the administration should take to build momentum to successfully implement each policy.

### Pre-work:

- Brainstorm potential achievements for each policy
- Review agency reports/meet with current agency leaders to understand the current state
- Review feedback from constituents, if available



### In-meeting activities:

- **Action planning:** Working groups are to map the key steps needed to successfully implement each policy



### Expected outputs:

- Recommend short and long term actions for each policy
- Recommend roadmaps of the first moves agencies should take to successfully implement each policy and why



# Committees should recommend a roadmap for each policy commitment's successful implementation

<b>First moves</b>	<p>What are the <b>first moves</b> that need to take place to set each policy commitment up for success? If these actions did not take place, would successful implementation within the first term still be possible?</p> <p><i>Examples: allocating budget, creating a task force, establishing a new role, gap analysis, etc.</i></p>
<b>Short term</b> <i>6 months to 2 years</i>	<p>Some policies may require <b>laying groundwork</b> for subsequent years (e.g. building momentum around a particular program). These actions should be sequenced in the short term to enable impact in the long term.</p> <p><i>Examples: piloting a program, passing legislation to enable long-term change, conducting stakeholder interviews, advocacy efforts, etc.</i></p>
<b>Long term</b> <i>2+ years</i>	<p>Many policies will have broad intended outcomes and require resources from <b>multiple agencies/partners</b> to implement.</p> <p><i>Examples: launch and scale new programs, large-scale infrastructure projects, etc.</i></p>

## Criteria to consider

1. Is the work already underway?
2. Do we have the resources needed? (staff, budget, etc.)
3. Does the work require resources/inputs from multiple agencies/partners? How many?
4. Do we have a clear lever identified to achieve our objective?
5. Do we already have the legislative authority to implement the policy?
6. What barriers exist? How will they impact our potential time frame?



## Post Meeting 4 & 5 output

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Translate your action planning into a list of steps per policy. For each policy, produce the chart below.

Action	First Move? ( <i>Immediate Step</i> ) Short-Term? ( <i>6 Months – 2 Years</i> ) Long-Term? ( <i>2+ Years</i> )	Responsible <i>Person or agency</i>	Comments <i>Provide details and/or rationale for this action</i>

# Meeting 6: Identifying key metrics

## Meeting objectives:

- Identify how we will measure progress and tell the story of our success
- Identify potential gaps in existing data systems
- Review final recommendations across working groups and acknowledge participants for their contributions

### Pre-work:

- Brainstorm potential key metrics to discuss
- Review information provided by previous administration such as agency reports to guide what data state staff and/or the public can access



### In-meeting activities:

- **Identifying key metrics:** Working groups to discuss potential key success metrics for each policy
- **Put it all together:** Working groups summarize their recommendations for each policy



### Expected outputs:

- Recommend up to 2-3 key metrics for each policy



# Post Meeting 6 output

For each policy, recommend up to four key success metrics to track. Please indicate whether this data is tracked by current agencies (if the information is available).

Policy	Recommended metric	Currently tracked? Y/N

# Meeting 7: Drafting Report

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Use this table to summarize your recommendations for each policy from your working group.

Policy	Theory of Change Statement	Policy Levers	Short Term Actions <i>First Moves, 6 mo - 2 years</i>	Long Term Actions <i>2+ years</i>	Key Leaders	Metrics
	If we implement [X policy], then we will affect [X change] that will drive/grow/sustain [X impact].	Executive Order, Legislative Action, Task Force, Budget Allocation, Private-Public Partnership			Please use position titles, offices, or organizations; do not name individuals	Brief Bulleted List