



# Applying the Six Phases of Policy, Systems, and Environmental Change

## How do you get started in your organization or community?

This fifth and final *Action Learning Brief* provides simple action steps and resources to help organizations and technical assistance (TA) providers learn how to adopt policy, systems, and environmental (PSE) change. The following table aligns online or in-person national resources to each phase and proposed action steps. For more information and training on how to address PSE change for sustainability, visit <https://illinoisprc.org/>.

PHASE	ACTION STEPS	GUIDES, TOOLS AND RESOURCES
<p style="text-align: center; font-weight: bold; font-size: 1.2em;">ONGOING</p>	<p><b>Strategic and systems thinking</b></p> <ul style="list-style-type: none"> <li>■ Identify connections among partners, people, neighborhoods, organizations, municipalities, counties, and states</li> </ul> <p><b>Engagement</b></p> <ul style="list-style-type: none"> <li>■ Undertake continuous conversations, formal or informal, with new and current partners</li> </ul> <p><b>Conduct Continuous Quality Improvement (CQI)</b></p> <ul style="list-style-type: none"> <li>■ Develop CQI systems to assess progress and promote learning</li> </ul>	<p><b>Strategic and systems thinking</b></p> <ul style="list-style-type: none"> <li>■ Kansas Leadership Center: <a href="https://kansasleadershipcenter.org/">https://kansasleadershipcenter.org/</a></li> <li>■ Public Health Learning Network Navigator: <a href="https://www.phlearningnavigator.org/">https://www.phlearningnavigator.org/</a></li> </ul> <p><b>Engagement</b></p> <ul style="list-style-type: none"> <li>■ Tamarack Institute: <a href="https://www.tamarackcommunity.ca/">https://www.tamarackcommunity.ca/</a></li> <li>■ Community ToolBox: <a href="https://ctb.ku.edu/en">https://ctb.ku.edu/en</a></li> </ul> <p><b>CQI process</b></p> <ul style="list-style-type: none"> <li>■ Public Health Learning Network Navigator: <a href="https://www.phlearningnavigator.org/">https://www.phlearningnavigator.org/</a></li> <li>■ Community ToolBox: <a href="https://ctb.ku.edu/en">https://ctb.ku.edu/en</a></li> </ul>
<p style="text-align: center; font-weight: bold; font-size: 1.2em;">PHASE 1</p> <p style="text-align: center; font-weight: bold;">Strategy Development</p>	<ul style="list-style-type: none"> <li>■ Assess organization and/or community needs</li> <li>■ Develop a partner structure, such as a coalition or collaborative</li> <li>■ Develop a theory of change about how activities will lead to impact</li> <li>■ Develop a strategic plan</li> <li>■ Train partners on the strategic approach and actions needed</li> </ul>	<p><b>Assessment tools</b></p> <ul style="list-style-type: none"> <li>■ Environmental Scanning: <a href="https://www.top-training.net/">https://www.top-training.net/</a></li> <li>■ Community Toolbox: <a href="https://ctb.ku.edu/en">https://ctb.ku.edu/en</a></li> </ul> <p><b>Develop a partnership structure</b></p> <ul style="list-style-type: none"> <li>■ Public Health Learning Network Navigator: <a href="https://www.phlearningnavigator.org/">https://www.phlearningnavigator.org/</a></li> <li>■ Community ToolBox: <a href="https://ctb.ku.edu/en">https://ctb.ku.edu/en</a></li> </ul> <p><b>Theory of Change</b></p> <ul style="list-style-type: none"> <li>■ Theory of Change: <a href="http://www.theoryofchange.org">www.theoryofchange.org</a></li> </ul> <p><b>Strategic planning</b></p> <ul style="list-style-type: none"> <li>■ Institute for Cultural Affairs (ICA): <a href="https://www.top-training.net/top-strategic-planning">https://www.top-training.net/top-strategic-planning</a></li> <li>■ Community ToolBox: <a href="https://ctb.ku.edu/en/developing-strategic-and-action-plans">https://ctb.ku.edu/en/developing-strategic-and-action-plans</a></li> </ul>
<p style="text-align: center; font-weight: bold; font-size: 1.2em;">PHASE 2</p> <p style="text-align: center; font-weight: bold;">Expand Engagement and Begin Adoption Planning</p>	<ul style="list-style-type: none"> <li>■ Assess decision-making structures, policies, and protocols for ways to expand beyond the original policy, systems, and environmental (PSE) change to make health and equity a part of the entire organization</li> <li>■ Develop communication plan including messages and platforms</li> </ul>	<p><b>Decision-making structure</b></p> <ul style="list-style-type: none"> <li>■ Midwest Academy: <a href="http://www.midwestacademy.com/">http://www.midwestacademy.com/</a></li> </ul> <p><b>Develop a communication plan</b></p> <ul style="list-style-type: none"> <li>■ Community ToolBox: <a href="https://ctb.ku.edu/en">https://ctb.ku.edu/en</a></li> </ul>

PHASE	ACTION STEPS	GUIDES, TOOLS AND RESOURCES
<b>PHASE 3</b> Adoption and Initial Implementation	<ul style="list-style-type: none"> <li>Finalize materials, talking points, and prepare expert testimony</li> <li>Provide training on the PSE change</li> </ul>	<p><b>Prepare materials, talking points, and testimony</b></p> <ul style="list-style-type: none"> <li>Community ToolBox: <a href="https://ctb.ku.edu/en">https://ctb.ku.edu/en</a></li> </ul> <p><b>Provide training on PSE change</b></p> <ul style="list-style-type: none"> <li>Illinois Prevention Research Center: <a href="https://illinoisprc.org/">https://illinoisprc.org/</a></li> </ul>
<b>PHASE 4</b> Implementation	<ul style="list-style-type: none"> <li>Organize community events to maintain interest and momentum</li> <li>Develop a technical assistance monitoring system and evaluate the efforts</li> </ul>	<p><b>Organize Community Events</b></p> <ul style="list-style-type: none"> <li>Tamarack Institute: <a href="https://www.tamarackcommunity.ca/">https://www.tamarackcommunity.ca/</a></li> </ul> <p><b>Develop a monitoring system</b></p> <ul style="list-style-type: none"> <li>Community ToolBox: <a href="https://ctb.ku.edu/en">https://ctb.ku.edu/en</a></li> </ul>
<b>PHASE 5</b> Institutionalization	<ul style="list-style-type: none"> <li>Conduct a decision analysis of other ways PSE change can occur within the organization</li> <li>Expand the partnership agenda</li> </ul>	<p><b>Conduct Decision Analysis and Expand Partnership Agenda:</b></p> <ul style="list-style-type: none"> <li>Midwest Academy: <a href="http://www.midwestacademy.com/">http://www.midwestacademy.com/</a></li> <li>Community ToolBox: <a href="https://ctb.ku.edu/en">https://ctb.ku.edu/en</a></li> </ul>
<b>PHASE 6</b> Expansion	<ul style="list-style-type: none"> <li>Explore collaborative leadership approaches to expand beyond one agency</li> </ul>	<p><b>Collaborative Leadership Training</b></p> <ul style="list-style-type: none"> <li>Kansas Leadership Center: <a href="https://kansasleadershipcenter.org/">https://kansasleadershipcenter.org/</a></li> <li>Tamarack Institute: <a href="https://www.tamarackcommunity.ca/">https://www.tamarackcommunity.ca/</a></li> </ul>

## ACKNOWLEDGMENTS

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## SUGGESTED CITATION

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