

## Establishing a children’s fund: an A to Z checklist

System-building	
A	Identify community-wide goals and desired outcomes for children and youth
B	Identify/strengthen an intermediary that convenes providers and partners to engage in system-building and quality improvement
C	Educate the public about the needs of kids and successes of the current system
Research	
D	Conduct a needs assessment of children and youth in your community (or identify a recent assessment)
E	Perform a fiscal scan of all spending on children & youth (identify gaps, compare to total local spending, identify proportion spent on prevention)
F	Research the taxing authority of the locality to identify feasible options for generating revenue and potential limitations
G	Research the history of local ballot measures
H	Research the political path for generating and dedicating revenue for children and youth (e.g. voter-approved ballot measure)
I	Conduct polling on public opinion and use the results to guide messaging, how the purpose of the fund is framed, and the rate of the tax
Coalition-building	
J	Identify potential allies within the following stakeholder groups: providers, intermediaries, youth, families, community organizers, local elected officials/policymakers, civic leaders, business leaders, faith leaders, local funders/philanthropy
K	Conduct outreach and informational meetings with individual stakeholder groups
L	Build your list of coalition partners and champions based on interest shown at outreach meetings
M	Create opportunities for engagement at multiple levels, such as: members of the campaign committee; members of the steering committee as the plan for the dedicated fund is conceived; and volunteers on the campaign.
N	Engage youth and family representatives in decision-making around the plan for establishing a fund from the beginning.
O	Make an ask of coalition partners, either to provide volunteers, support fundraising/provide funds, or use social or political capital
P	Select a convening entity (organization, network, or coalition) with the credibility and capacity to convene meetings, organize partners, and fundraise for pre-campaign groundwork
Campaign readiness	
Q	Identify coalition members willing to serve on a campaign committee to perform the below activities
R	Identify the target election date and know what else will be on the ballot
S	Identify committee chairs whose names will be on the committee and bank account, as well as every campaign material
T	Develop a campaign committee name, recruit a treasurer, establish a bank account, and file this information with your state’s campaign finance authority. Some states also require filing with a local authority such as a county clerk or board of elections.
U	Create a fundraising plan for the campaign (engage a professional political fundraiser where necessary)
V	Campaign committee identifies a campaign consultant who can develop a campaign plan and manage firms and consultants
W	Craft the establishing legislation (e.g. ballot measure). This will involve negotiating with stakeholders on the fund purpose and structure.
X	Launch a public education campaign with information on the need in the community and what it will take to meet it
Y	Measure is placed on ballot. Once a measure is on a ballot, the public education phase ends and the advocacy/campaign phase begins
Z	Launch, run, and win your campaign!