



Guide to Advocacy and Policymaking for Systems Change

I. PURPOSE

Codify best practices that raise the voices of those most affected by systemic barriers.

II. INTRODUCTION

At UTEC, we believe that the most effective and transformative policy change is led by those whose lives stand to benefit the most from that change. Our model blends relationship-centered direct services with youth-led advocacy grounded in love, trust, and an unshakeable belief in second chances.

This guide was created to uplift and codify the lessons we've learned through decades of organizing, advocacy, and systems-change work in partnership with young adults in Massachusetts' Merrimack Valley. We outline how advocacy teams, direct service staff, and program participants can collaborate to identify issues, build coalitions, and influence decision-makers. From hosting candidate forums to shaping state budgets, this guide highlights the many pathways to change and provides tools to navigate them. Whether you're just starting to explore civic engagement or looking to deepen your organization's policy work, this guide is designed to meet you where you are.

Our hope is that this guide serves as a roadmap to empower more organizations to integrate systems change into their everyday work. Thank you for taking the time to read it and for your partnership as we chip away at systemic barriers together.

Sincerely,

Gregg Croteau, MSW
CEO, UTEC

About UTEC

Mission

UTEC is a youth development and social justice organization that provides both direct services in the Merrimack Valley region of Massachusetts and policy and systems change work related to issues facing young adults who are out of school, involved with gangs, or returning from incarceration. UTEC's mission is to ignite and nurture the ambition of young adults to trade violence and poverty for social and economic success. We are dedicated to helping young people ages 17-25 in the communities of Lowell, Lawrence, and Haverhill overcome the very real challenges of interrupted education, gang involvement, and mass incarceration. We believe that: If young adults who are caught up in street life are

productively engaged in UTEC activities for an extended period during the critical ages of 17-25, then by 25, they will have the skills and resilience they need to pursue their dreams and avoid further involvement in the criminal justice system.

Our program starts with street outreach, gang peacemaking, and “in-reach” within local correctional facilities. Streetworkers build relationships with young adults, conduct gang peacemaking, visit young people in correctional facilities, both jails and prisons, provide support and build relationships, and recruit individuals to engage in UTEC’s programs upon returning to the community. Young adults at UTEC receive 2-3 years of intensive support services, including real-world employment experience through our multiple social enterprises (Mattress Recycling, Woodworking, Food Services, and Community Organizing). Education is provided through onsite HiSET (high school credential) preparation classes and a curriculum developed by UTEC staff that emphasizes social and emotional learning and social justice. Opportunities for civic engagement are embedded throughout every facet of the program in order to encourage young adults to find their voice through advocacy and to use their lived experience to shift the policies that impact their communities. UTEC’s approach works: 71% of young adults enrolled in UTEC’s program in 2022 had no new arraignments within one year, a great result compared to 24% of young adults statewide who were re-arraigned within three years (CSG 2018 analysis of FY11-FY14 data).

Community organizing has been at the heart of UTEC since its founding. The organization was created by young adults who took the initiative to improve their community by establishing a drop-in center, a sanctuary from gang violence. Over the years, UTEC has continued to amplify the voices and experiences of young people, demonstrating the power of their collective action to create change in their communities. As their platform expanded locally and statewide, it was a natural progression for UTEC to deepen its organizing, advocacy, and policy-making work.

In 2019, a group of young people and staff officially launched the Organizing Crew program. This program engages young adults in policy and system change, focusing on social justice issues, grassroots organizing, and policymaking. With their lived experiences and community involvement at the forefront, our mission is to address the barriers they face through legislative and systemic transformation.

UTEC’s Training Center for Excellence

Through UTEC’s Training Center for Excellence (TC4E), we offer training and technical support to a range of nonprofit organizations as part of the Massachusetts Department of Public Health’s initiative to combat gun violence, focusing on both public health and racial equity. If you are interested in more dedicated support, please reach out to our training and technical assistance team at TC4E@utecinc.org.

Values

Assume Goodness

We assume goodness behind everyone’s actions.

Madd Love

We show madd love, unconditionally accepting each person

Clean Slate

We offer everyone a clean slate.

Respectful Curiosity

We carry out respectful curiosity, always seeking out moments to connect.

We Are Sponges

We are sponges actively seeking feedback.

Contagious Passion

We embody contagious passion in all we do.

Think Big

We think big about what we can achieve

Chip Away

We continually chip away, demonstrating relentlessness in our pursuit of positive change.

Plant Seeds of Peace

We plant seeds of peace and cultivate trust.

See Beyond the Mask

We see beyond the mask, knowing there's always more beneath the surface.

Ignite Social Justice

We ignite social justice.

Spark Sustainability

We spark sustainability – for our young people, our enterprises, and our physical environment.

[Click here to read UTEC's DEI Pledge.](#)

III. ADVOCACY AND POLICYMAKING GUIDE

Approach

This guide is designed to help organizations integrate advocacy and systems change into their direct service work. It is a reflection of UTEC's experience leading youth-driven policy efforts and offers actionable strategies for organizations at any stage of their advocacy journey, with practical tools, best practices, and real-world examples. These strategies are rooted in persistence, respect, and a deep commitment to uplifting the voices of those most impacted, and are meant to be adapted to a variety of unique communities.

Team Structure - Utilizing Your Team to Win Change

People with Lived Experience:

The central focus of our organizing is people who are directly impacted by the issues we seek to change. They identify the issues to work on, testify for budget initiatives and legislation, participate in coalition work, and receive training for careers in politics, community organizing, and public service.

Staff Members - Policy and Organizing Staff

The organizing and policy team members play a crucial role in managing daily activities, external policy and organizing efforts, and collaborating internally with community members and program participants with lived experience. Staff collaborate with participants to identify their issues and priorities, draft and monitor budgets and legislation, and work with coalitions on shared interests. To support the success and advancement of participants, staff conduct regular training sessions.

Staff Members - Direct Service Teams, Development, and Administration

Whenever possible, it is important to hire staff who reflect the communities served in terms of race, culture, and lived experience. Direct service team members are on the front lines, and they possess valuable insights into program participants' needs, challenges, and aspirations. Development and administrative teams are expert storytellers who can help secure additional resources and install infrastructure to help program participants thrive. These teams will also provide crucial support in facilitating opportunities to create spaces for open dialogue and help communicate the importance of the advocacy work being done.

Training and Development

Providing training and professional development opportunities for program participants and staff alike is key to building relationships with potential coalition partners, cultivating skills, and supporting the ongoing success of those who contribute to campaigns. Conferences are a valuable tool that helps to strengthen connections and learn emerging best practices. By sharing expertise and developing leaders, future generations gain the tools to ignite and sustain change.

Organizing Staff

Staff professional development should focus on advocacy, mentorship, and effective community engagement, including but not limited to the topics below.

- *Advanced Legislative & Budget Advocacy:* Deeper dives into legislative processes, budget tracking, and relationship-building with policymakers.
- *Coalition Management & Partner Collaboration:* Training on working with advocacy groups, state agencies, and grassroots organizations.
- *Communications & Media Relations:* Enhancing storytelling, press engagement, and digital advocacy skills.
- *Trauma-Informed Care & Crisis Intervention:* Best practices in supporting participants who have experienced violence, incarceration, or instability.
- *Anti-Racism & Equity Training:* Ensure your work remains aligned with racial justice

- and anti-oppression principles.
- *Mentorship and Coaching:* Help staff develop skills to guide participants in their leadership journeys.

Program Participants

Community members with lived experience are creating meaningful change while learning new skills in organizing and policymaking. Their activities should focus on leadership, advocacy, and personal growth.

- *Legislative Process & Policy Advocacy:* Trainings on how laws are made, how budgets work, and how they can influence policymaking.
- *Public Speaking & Storytelling:* Workshops on how to effectively share personal experiences in testimony, media interviews, and public events.
- *Career Pathways in Public Service and Organizing:* Exposure to careers in policy, community organizing, and social justice sectors.
- *Workplace Skills Training:* Resume building, professional communication, and financial literacy training.
- *Trauma-Informed Leadership:* Understanding trauma's impact and how to lead with resilience in community advocacy.
- *Peer Mentorship and Leadership Development:* Pair participants with staff mentors to strengthen leadership skills.
- *Mental Health & Wellness Workshops:* Coping skills, stress management, and wellness practices to sustain long-term engagement.
- *Conflict Mediation & De-Escalation:* Skills to manage community tensions and promote nonviolent solutions.

Key External Relationships

Advocacy is centered on storytelling and relationship-building – cultivating relationships expands the network of potential advocacy partners.

Community:

Building strong relationships within local communities is essential. Organizations should:

- Take time to understand the local landscape and key stakeholders.
- Learn about the community's mayor, city council members, and other local leaders.
- Attend community events whenever possible.
- Participate in peace walks, rallies, outreach to the unhoused community, and other local initiatives.
- Invite City Council Members, the Mayor, and state-level officials to engage with program participants. Be open to hosting them, meeting with them, and fostering meaningful connections.

Coalition Partners:

Coalitions can significantly strengthen advocacy efforts. Organizations should:

- Research like-minded organizations relevant to legislative goals.
- Identify working groups focusing on related issues.
- Collaborate with coalition partners on key legislative issues.
- Attend coalition meetings and stay informed about their events to align advocacy

efforts.

- Participate in events held by coalition partners and bring program participants to amplify their voices when possible.

Legislative Partners:

Fostering relationships with legislators and their staff is critical, especially during budget season. Organizations should:

- Develop relationships with legislators and their staff. Cultivate relationships with key staff, such as the Chief of Staff, Legislative Aides, and Legislative Directors.
- Learn legislators' backgrounds—know their affiliated party, the committees they serve on, and their general stance on issues. While it's not necessary to know everyone personally, it's helpful to recognize them and engage with them outside their offices.
- In-person meetings with legislators are often the most effective, especially when advocating for budget items or legislation.
- Understand the legislative cycles and time constraints, particularly during busy periods like the budget season. Advocacy should be sensitive to these schedules and mindful of the legislative workflow.
- Participants must have the opportunity to directly share their stories with legislators. They must hear firsthand how specific budget items or legislation will impact their lives.
- Invite legislators for site visits. A site visit allows legislators to engage with participants and staff, deepening their understanding of our mission. If appropriate, invite the media to these visits.
- Regular one-on-one meetings with legislators are key to building long-term relationships. Make it a priority to visit legislators at least once or twice a week during legislative sessions.

Coalition Building

Coalitions consist of organizations aligned on shared goals. During advocacy campaigns, various organizations and groups are likely to advocate for similar causes. By uniting diverse groups, each contributing unique resources and perspectives, coalitions can mobilize larger groups and amplify a campaign's momentum. Coalitions can happen at any level and exist all over the country, locally, statewide, and nationally.

To initiate a coalition, organizations should reach out to potential partners and convene meetings where resources, information, and frustrations can be shared. From there, organizations can work collaboratively to find potential policy solutions that benefit the entire ecosystem. Research should be done on similar campaigns held in other jurisdictions – they can create partnership opportunities as well as provide insight on successful strategies.

Working with Directly-Impacted Program Participants

The stories, needs, and challenges of people who are directly impacted shape every meaningful campaign. Below are some best practices for engaging with community members in a meaningful, respectful way:

- **Meet People Where They Are:**
 - Approach each participant with empathy and understanding. Acknowledge their individual experiences and meet them where they are, both emotionally and practically.
 - Be mindful of the personal challenges they may face. If a participant is dealing with a serious issue, connect them to any supports offered at your organization.
- **Build Trusting Relationships:**
 - Be present, listen actively, and engage consistently to build trust.
 - Participate in programming activities to connect with participants on a deeper level and understand their perspectives.
- **Empower Voices:**
 - Put participants at the forefront of advocacy efforts. Bring them to speak with legislators, testify on the issues they care about, or simply attend for the experience. Even if they choose not to testify, we foster curiosity and bravery by encouraging them to engage in new experiences.
 - Encourage participants to reclaim their own stories. Create a safe space for them to share their experiences, whether publicly or privately, and help them shape their narratives for advocacy.
 - Ask questions like:
 - What issues do you want to advocate for?
 - What challenges or systems have you faced that need to change?
 - What could have helped you when you were at your lowest, and how can we ensure others don't face the same struggles?
- **Respect Boundaries:**
 - If a participant doesn't feel ready to share their story, that is OK! Ask if their story can be shared anonymously.
- **Create Opportunities for Community Engagement:**
 - Involve participants in community initiatives, such as voter registration, candidate forums, and local outreach. Empower them to take action on issues that matter to them, giving them the tools to make a meaningful impact in their communities.

Policy Approach

Candidate Forums

Candidate forums are an effective way to engage the local community and initiate policy and systems change. The process of organizing candidate forums helps transition and propel the work forward in the varied areas of an overall approach to policymaking. Based on the candidates' responses, candidate forums surface the potential to develop specific advocacy campaigns. The questions asked and information shared during candidate forums are made available to voters far and wide, making it possible for them to be better informed on candidates' views and the issues that impact justice-involved emerging adults.

Common formats for a candidate forum include a moderated panel, a series of 1-1 interviews, or a town hall. Program participants or organizing staff can moderate. Forums can take place in person or virtually over Zoom or livestream.

Organizations should use consistent, transparent criteria for who gets invited and include clear guidelines and expectations for participation. All candidates who attend should be thanked at the end of the event.

Candidate forums are great vehicles for widespread engagement, and organizations can utilize flyers, social media, newsletters, community calendars, and coalition partners to help spread the word! Organizers can continue to amplify the event even after it starts by recording it, streaming it on social media, or sending a recap to their email subscribers.

Budget Advocacy

By establishing specific line items in the state or national budget, community-based organizations can address funding gaps in critical services that directly impact program participants, ensuring they have consistent access to the resources they need. Budget advocacy campaigns also present an opportunity to work with other organizations to ensure the local ecosystem has the resources needed for new services. Budget investments promote economic growth, enhance public services, and ensure that services are well-maintained for future generations.

To do this effectively, staying informed about developments at the state level is crucial. Since the state budget is a living document that evolves, it is important to track policy changes and engage with statehouse staffers, representatives, and senators. Building strong relationships with these key decision-makers ensures that communities can advocate effectively for necessary funding when emergency budgets arise.

Here's an example of how UTEC was able to use the budget process to drive transformative change in Massachusetts:

- **Emerging Adults Reentry Grant Program:** This was a brand-new budget line item that provided new programming and services for young adults currently incarcerated in county jails and state prisons. This new statewide line item was passed three years ago at \$4 million and was then increased to \$6 million.

Legislative Advocacy

In the legislative arena, knowledge is power. Organizations must build relationships with local advocates and lawmakers, participate in the coalitions and lobby days of their peers, and find real-world advocacy experiences for program participants, including testifying in support of legislation.

Door-knocking is a time-tested way to meet and lobby legislators and staff to support and co-sponsor bills. Organizations should plan to be present at floor votes to push for favorable reports. Amidst the hustle and bustle of lawmaking, it is important to prioritize creating a supportive environment for participants who lobby and testify at hearings by inviting staff and peers to attend. When a campaign ends, whether or not the desired outcome was

achieved, legislative champions and co-sponsors should be thanked for their role in advancing the cause.

Administrative Advocacy

This category of policy work focuses on those changes that can be done administratively, i.e., through the direction of the Governor or his/her Secretariats, or the leadership of other elected officials such as Sheriffs or District Attorneys. Rather than passing new laws, this approach engages directly with administrative agencies, correctional institutions, and policymakers to drive change within existing systems.

Examples of administrative changes include: executive orders, agency rulemaking, guidance documents that shift how laws are enforced, and waivers exempting certain groups or localities from policy.

While relationship-building is important in all areas of advocacy, here it is critical. Organizations should bring their concerns about administrative policies directly to those in charge, utilizing stories from program participants to illustrate their points. In these instances, your program and participants can act as a “thought partner” to the administrative agency they are seeking to change – by treating stakeholders as the true partners that they are, they can invest deeply in the campaign.

Glossary

Actions/ Events/ Rallies	Refers to organized activities designed to engage the public, generate awareness, and mobilize support for a specific cause, issue, or candidate.
Bond Bills	Is legislation that authorizes the state to borrow money through the issuance of bonds to finance specific capital projects. These projects include infrastructure improvements, such as transportation, education, environmental projects, and public buildings.
Champion	Legislators that will file amendments/legislation.
Coalition	A group of people and organizations that come together to work and advocate for a cause.
Conference Committee	A temporary, bipartisan panel formed to reconcile differences between leaders in the House and Senate versions of a legislation.
Delegation	Refers to the group of elected officials/ legislators in the House and the Senate.

Governor's Budget	Is a comprehensive financial plan submitted annually by the Governor to the state legislature. It outlines the administration's revenue estimates and spending priorities for the upcoming fiscal year starts on July 1 and ends on June 30 of the following year. (Oftentimes it is late and it is extended until July 31st).
House Budget	What the House files after the governor files their budget.
Legislation	A bill, language that was filed to become a law.
Media Availabilities	Refers to a scheduled time when a public figure/politician makes themselves available to the media for questions and interviews; i.e.a press conference, a brief Q&A session.
Senate Budget	What the Senate files after the House debates their budget.
House Ways and Means Committee	A legislative committee responsible for overseeing the state's budget and finances. It plays a central role in the development and review of the state budget, taxation, and other financial matters.
Senate Ways and Means Committee	A legislative committee responsible for overseeing the state's financial matters, including the state budget, taxation, and appropriations. It plays a significant role in shaping the fiscal policies and financial management of the Commonwealth.