

RE-AMP

The Art of Campaign Planning

How to Design a Successful Campaign and Win
RE-AMP Organizing Hub

2014

About RE-AMP

RE-AMP is an active network of nearly 160 nonprofits and foundations across eight Midwestern states working on climate change and energy policy with the goal of reducing global warming pollution economy-wide 80 percent by 2050.

RE-AMP brings environmental, labor, faith, youth, energy, conservation and other groups together to develop common priorities to achieve our goals in the areas of clean energy, coal, energy efficiency, global warming solutions, and transportation. With a wide array of member organizations, RE-AMP provides many opportunities for various constituencies throughout the Midwest.

To help meet RE-AMP's goal of reducing global warming pollution 80 percent by 2050, the RE-AMP Steering Committee created the RE-AMP Organizing Hub. The Organizing Hub brings together targeted policy campaigns and movement building, to build power for long-term success. The Organizing Hub focuses on campaign planning, strategy coaching and campaign skills-building for RE-AMP members.

Effective campaigns build an organization's power, and powerful organizations are able to run increasingly effective campaigns. This guide, with its emphasis on campaign planning, seeks to help build power within the RE-AMP network so that members can run more effective campaigns in the short term and build a movement to fight climate change in the long term. For more information about RE-AMP or the Organizing Hub, please visit www.reamp.org.

About the Author



Melissa Gavin, Organizing Hub Coordinator, works to build the capacity of RE-AMP members and its partner constituencies to create more environmental policy wins. She assists in program development, developing leadership, gathering and sharing campaign best practices and promoting long-term movement building within RE-AMP and its partner constituencies. Prior to joining Clean Wisconsin, Gavin served as the Executive Director of the State Environmental Leadership Program, an organization dedicated to protecting and restoring America's environment by strengthening and networking smart, powerful and well-run environmental advocacy organizations. Gavin holds a Masters of Public Affairs degree from the Robert M. La Follette School of Public Affairs at the University of Wisconsin-Madison. She completed her undergraduate degree in Environmental Studies at Florida International University, in Miami, FL. When not at RE-AMP, she can be found in a garden, whether in her plot in the community garden she helps coordinate, working with students at Sandburg Elementary where she serves as the school garden coordinator, or daydreaming about her own next garden adventure.

Table of Contents

About RE-AMP 2

About the Author 3

Introduction..... 6

 What is a Campaign?..... 6

 How We Created This Guide..... 7

Campaign Planning: Why Bother? 9

Identifying an Issue..... 11

The Campaign Planning Process 12

 What Does a Good Campaign Planning Process Look Like?..... 12

 The Campaign Planning Meeting..... 13

 Campaign Planning in a Coalition Setting..... 17

Topography of a Campaign Plan..... 20

 1. LAY OF THE LAND..... 21

 2. GOALS AND OBJECTIVES..... 23

 3. TARGETS..... 26

 4. THEORY OF WINNING..... 31

 5. POTENTIAL OPPONENTS AND ALLIES 32

 6. RESOURCES AND ASSETS 34

 7. STRATEGIES AND TACTICS..... 35

 8. MESSAGE..... 37

 9. MESSENGERS AND MEDIA 41

 10. NEEDS 43

 11. BUDGET AND FUNDRAISING PLAN..... 44

 12. EVALUATION..... 46

 13. TIMELINE 47

Updating Your Campaign Plan 48

 When and How to Update Your Campaign Plan..... 48

 Ending or Shifting Your Campaign 49

The Campaign Plan Document Formats..... 51

 Matrix..... 51

 Linear Narrative 51

 Question and Answer 52

 Matrix and Narrative Hybrid..... 53

 Writing the Campaign Plan..... 54

Conclusion 55

Resources for Additional Reading	56
Advocacy Databases	56
Campaign Evaluation	56
Campaign Planning	56
Coalitions.....	57
Power Mapping.....	57
Message.....	57
Opposition research.....	57
Organizational Power Analysis/ Asset Mapping	58
References	59
Appendix A: Topography of a Campaign Plan	62
Appendix B: Campaign Planning Discussion Guide.....	63
Lay of the Land.....	63
Goals and Objectives.....	65
Targets.....	66
Theory of Winning.....	68
Potential Opponents and Allies.....	69
Resources and Assets.....	70
Strategies and Tactics	70
Messages.....	71
Messengers and Media Strategy	73
Campaign Needs.....	75
Budget and Fundraising Plan.....	76
Evaluation	77
Timeline.....	78
Appendix C: Strategy Selection	79
Appendix D: Possible Strategies and Tactics.....	80
Appendix E: Opposition Tactics.....	84

Introduction

Successful campaigns are not accidental. They are the result of thoughtful planning and deliberate action. RE-AMP's Organizing Hub launched in 2014 to boost campaign excellence within the RE-AMP network. The Hub provides campaign planning assistance, strategy coaching and campaign skills-building trainings to RE-AMP members working on campaigns to reduce carbon emissions. This guide is a collection of best practices in campaign planning from seasoned campaign planners within and outside of the RE-AMP network. It is a guide for putting together effective issue campaigns, based on a review of campaign plans and planning processes, interviews with campaign planners, and a review of campaign planning literature.

Too many campaigns never get off the ground because they remain great intentions floating about in the organizational ether.

—Tools for Radical Democracy

Strong campaigns come in all forms, shapes and sizes. There is no magic template or formula that works for all campaigns, every time. What we do know, however, is that seasoned campaign planners generally agree on the basic elements of a good campaign plan and campaign planning process. A good campaign plan is one that is written down, contains certain essential elements and in which the authors used a solid process for collecting the contents of the plan. That process is based on good research and allows for multiple stakeholders to provide input and get buy-in on the campaign as it is being formulated. A good campaign plan is revisited often and revised as conditions change, new challenges emerge and new opportunities present themselves. It is a living document and evolves with the campaign.

What is a Campaign?

A campaign is broadly defined as an effort with a planned and organized series of actions intended to achieve a specific goal. For purposes of the RE-AMP Organizing Hub, we fine-tune that definition a bit: our campaigns have a specific policy, investment or programmatic goal with clearly established decision-makers who are able to make the identified action happen, resulting in an effort to reduce carbon emissions. While planners of other types of campaigns may find value in this document, the guide was designed to work best with policy, issue and corporate campaigns at the local, state and federal level (as opposed to electoral campaigns, for example).

How We Created This Guide

To create this guide, we did a lot of homework. We surveyed the RE-AMP membership for campaign planning best practices. The survey was sent out to 163 organizations in fall 2013. Based on responses from the survey, we followed up with 34 organizations that self-identified as effective campaign planners. We asked these organizations to describe their processes and what they include in their written plans. We followed up with phone interviews and email interviews for additional details. We also contacted leading groups outside of the RE-AMP network to understand how other organizations teach campaign planning, including Western Organization of Resource Councils, New Organizing Institute, Wellstone Action and Sierra Club. Finally, we conducted a review of advocacy campaign planning guides and templates from well-respected organizing trainers. For a list of references used in this guide, refer to our References section at the end of this document. After reviewing campaign plans and templates from inside and outside of the RE-AMP network, conducting in-person, phone and email interviews, and reviewing relevant literature, we have distilled what we believe to be campaign planning best practices into this guide. Finally, we asked seasoned campaign planners from leading environmental advocacy organizations to review the guide and provide feedback.

The “campaign planner tips” in the yellow boxes along the sidebar of the guide come from seasoned campaign advocacy campaign planners who reviewed the guide and provided advice on the brass tacks of planning a campaign. We are especially grateful to our final reviewers who provided thoughtful feedback and helped us ground the ideas in this guide. Many thanks to:

- Rachael Belz (Ohio Citizen Action)
- Joel Bradshaw (Consultant)
- Bill Davis (Consultant)
- Pete Didisheim (Natural Resources Council of Maine)
- Abby Fenton (Will Steger Foundation)
- Gail Francis (RE-AMP)
- Chris Hagerbaumer (Oregon Environmental Council)
- Jim Jensen (Montana Environmental Information Center)
- Rick Johnson (Idaho Conservation League)
- Rob Moore (Natural Resources Defense Council)

- Katie Parrish (New Organizing Institute)
- Keith Reopelle (Clean Wisconsin)
- Amber Meyer Smith (Clean Wisconsin)
- Don Strait (Connecticut Fund for the Environment)
- Deanna White (Clean Water Action)
- Kevin Williams (Western Organization of Resource Councils)

Campaign Planning: Why Bother?

Organizations build their power — their strength and influence — in part through campaigns. Campaigns can and should be a power-building exercise. This is what makes the act of planning a campaign so important. If you are reading a guide on campaign planning best practices, we probably don't need to convince you that campaign planning is valuable. But you may need help convincing your board, executive director, program director or other key individuals that campaign planning is worth the investment, so we've included this section to help you make the case.

The general who wins a battle makes many calculations in his temple ere the battle is fought. The general who loses makes but few calculations beforehand.

—Sun Tzu, On the Art of War

Here is what we've heard from seasoned campaign planners:

Campaign planning lets us look at the big picture and set the agenda instead of just incrementally responding to our opponent's actions.

—Rachel Belz, Ohio Citizen Action

We have a record of winning campaigns because we deliberately plan out our campaigns. We've had successful campaigns on legislation, rulemaking, project permits, and dam removal— all due to an intentional campaign process.

—Pete Didisheim, Natural Resources Council of Maine

To think our opponents aren't mapping out their own strategy to further their special interests would be incredibly naïve. We know our opponents are systematically planning their efforts. We do campaign planning because it helps us get out ahead of them. Campaign planning helps prevent us from being too reactive and playing only on the opponent's turf.

—Amber Meyer Smith, Clean Wisconsin

Campaign planning allows us to be strategic and not just reactive. According to the Sierra Club Grassroots Training Manual, "A campaign should be planned motion, not frantic commotion." We use our resources better when we take the time to think about the best ways to deploy them.

Campaign planning defines the boundaries of our work. Planning a campaign is as much about what we will do as it is about what we won't do. It is about strategically focusing finite resources (e.g. money, staff time, volunteers) to achieve the most progress toward our goals. The written plan helps us stay focused on whether a particular action, tactic or event is aimed at our target decision-makers. We'll say this many times throughout this guide, but writing your plan down is crucial. Campaign plans need to be written down so your team has something to follow. This is never more important than when there is staff turnover. Having a written campaign plan can help ease a transition in the face of changes in a coalition or organization and will help keep everyone, literally, on the same page moving forward.

Campaigns and campaign plans raise money. You will most likely have to raise money at some point, and campaign plans can help you do that. Good grant proposals are a narrative of a good campaign plan, or at least parts of a plan. Campaign planning also helps you visualize how you can involve your current members and supporters in the effort, which can deepen their engagement with your organization, often resulting in increased support from them. Campaign planning also can help you find ways to grow new members, as campaigns can attract new attention to your organization.

Campaigns build power. At its heart, campaign planning is about power: Understanding how much power your target has and how much power you have, then figuring out how to change that dynamic to your advantage. Through campaigns, you can build your power. The process of campaign planning helps you do that, so you can win.

Identifying an Issue

Before you begin planning a campaign, you need to make sure you have a good issue. Issues are not the same as problems. **A problem becomes an issue when you call attention to it and propose a solution.** Note that not all issues lend themselves well to a campaign. Think carefully about whether the issue would make a good campaign issue for your organization. What makes a good campaign issue? Issues that lend themselves to building a formal campaign around have many of the following characteristics:

- There is a real problem that ordinary people connect with their own experience.
- You are proposing a viable solution that ordinary people connect to.
- It's potentially winnable and delivers concrete change.
- It offers an opportunity to build your organization and increase your power and influence
- It has a clear decision maker/s who can deliver on a demand the campaign is seeking.
- It affects and involves a lot of people.
- It is congruent with your organization's mission, values and capabilities.

Most groups we spoke to acknowledged that it is rare for issues to meet every criterion, but the more the better.

The Campaign Planning Process

A good campaign process results in the **co-creation** of a campaign plan, which increases the likelihood that planning participants will work together effectively throughout the campaign. In co-creating a campaign plan, you establish consensus on the most important parts of your campaign plan. A good campaign process can build in accountability, bring in fresh information, generate new ideas and provide an opportunity for buy-in from those you will need as part of your team. In this section, we'll discuss the elements of a good campaign planning process.

What Does a Good Campaign Planning Process Look Like?

The process to create the first draft of the campaign plan involves a meeting or a series of meetings to convene key like-minded stakeholders and get input and agreement. In total, it may be anywhere from a half-day meeting to a series of several meetings spread out over a few weeks, depending on the complexity of the issue, number of people involved and available resources. Ideally, stakeholders meet in person to establish the campaign's goals, targets, theory of winning, strategies and other core elements of the campaign plan and then meet again to revisit the plan once underway.

Many groups facilitate the meeting themselves, but we recommend using a facilitator with experience in campaign planning. This will allow key campaign staff to fully participate while someone else skillfully guides the process. It also increases the chances that the campaign plan reflects the full range of perspectives, which is particularly important for making the buy-in process authentic in a coalition or collaborative setting.

The Campaign Planning Meeting

Before the Meeting

Find a facilitator. If your budget allows, bring in a facilitator with experience in campaign planning. If this is not possible, you'll need to balance between effectively guiding the process and encouraging participants to do their best thinking with your need to fully participate in the discussion. In some cases, RE-AMP's Organizing Hub staff can facilitate campaign planning sessions for RE-AMP member groups at low or no cost.

Invite the right mix of meeting participants. Staff of your organization, staff of allied organizations, board members, community members, funders, and other stakeholders may all add value to the process, particularly in the power mapping process of campaigns.

A planning meeting should have the right mix of experience, expertise and authority in the room. But you also want to make sure you don't have too many cooks in the kitchen. A good meeting can include up to 20 people, but most campaigners prefer to have smaller meetings. When deciding who to invite, consider the following types of people who you may want to include:

1. The people who will do the work
2. The people who have information or access to information you need
3. The people who you need buy-in and/or authorization from

Gather information beforehand. Review the Topography of a Campaign Plan and anticipate the kind of information you will need about the issue. What is the political lay of the land? Who might be the targets? What do you need to know about them? How are decisions made by the relevant decision-making body?

Send out an agenda. Explain the goals of the meeting and the time expectation for participants. An experienced facilitator can help craft a strong agenda.

Planning process tips:

- Convene campaign stakeholders
- Bring necessary information to the meeting
- Use a facilitator
- Provide food and drinks
- Schedule follow-up meetings before everyone leaves
- Share the draft plan within 48 hours

Create your flipchart pages. Use a flipchart to guide the discussion and collect ideas. Before the meeting, make a flipchart page for the agenda and label a separate page of flipchart paper for each element of the campaign plan (e.g., goals, objectives, targets, strategies, tactics, message, etc.). Have them ready for the meeting. Use large lettering (approximately one inch) in a dark color and capital letters.

During the Meeting

Provide food. If the meeting is more than two hours long, make sure food and drinks are available to attendees. Food always helps boost participation. If the meeting is less than two hours, offer drinks.

Make introductions. Even if most participants already know each other, make introductions.

Review the agenda. Use this as an opportunity to restate the goal of the meeting: to draft the elements of a campaign plan.

Establish ground rules for the meeting. Write them on a piece of flipchart paper for all to see. You may consider some or all of the following:

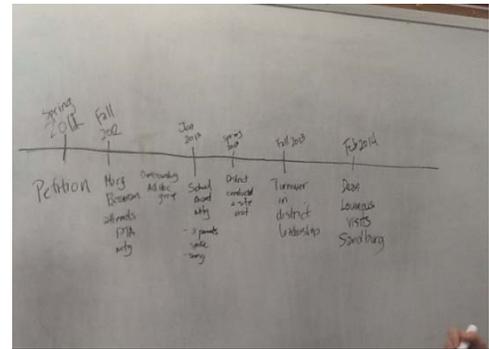
- One speaker at a time
- No side conversations
- No need to repeat
- We value brevity
- Listen to learn
- Everyone participates, no one dominates
- We assume positive intent
- Disagree without being disagreeable
- Don't keep your ideas to yourself

Discuss the Lay of the Land. This discussion can help ground everyone in the context of the issue and provide an opportunity to hear significant updates or recent developments. Depending on how much experience attendees have with the evolution of the issue, it can be helpful to draw a timeline

of the issue, including important developments such as when the problem first arose, past actions by those present in the room, actions taken by key leaders, etc.

Begin planning. Post the pages of the flipchart on the walls, so attendees can clearly see each page.

Start with a discussion of the campaign's goals and work through each of the 13 elements in the Topography of a Campaign Plan, but recognize that the planning process is not linear. You may often go back and forth between elements of the campaign plan. For example, often participants have new ideas for targets after they have thought more deeply about strategies, or ideas for messages come up before you have identified your needs and assets. That is perfectly normal and the process will flow more easily if you accept that campaign planning is an iterative process.



Timeline created during a lay of the land discussion at a February 2014 advocacy campaign planning meeting

Take the temperature of the group. Monitor energy levels, take breaks as necessary. Depending on how the discussion is going, how much ground has been covered, and how much information is needed to make decisions, you may find that you need to adjourn the meeting sooner than you planned and set up a follow-up meeting, or you may find that you use all of the available time and still need more. Acknowledge this to the group and ask them what they would like to do.

Review next steps. Write these down on a sheet of flipchart paper and clearly indicate who will do what. This builds accountability into the process. **Decide at the meeting who will draft the plan** and when participants can expect to see it.

Adjourn and thank everyone. Make sure you thank everyone for coming. Restate when they can expect to see a draft campaign plan and other items discussed at the meeting. If the group decides to convene a follow-up meeting, **set up the next meeting before everyone leaves**. Send out a reminder of the next meeting immediately after this meeting concludes.

Campaign Planner Tip:

Follow-up is often where many efforts fall apart in a coalition setting. During the campaign planning session, have the group identify an individual to write the campaign plan.

After the Meeting

Properly handle the flipchart pages. Make sure each flipchart page has a title at the top and then number each page. Consider taking a picture of each page as well. Stack them together and then roll them up, rather than folding them, which will create creases. On the outside of the roll, write the name of the meeting, the date and your name.

Type up meeting notes. Convert flipchart pages into computerized notes to more easily copy and paste ideas and information into the draft campaign plan.

Draft the campaign plan. Using the notes from the meeting, draft the campaign plan. Circulate this to attendees as soon as possible, preferably within 24-48 hours of the meeting so the fledgling campaign doesn't lose steam. Ask for feedback within a week. Revise the campaign plan based on feedback from meeting participants.

Campaign Planning in a Coalition Setting

Coalitions are common in the environmental movement, so we'll draw special attention to them here. A coalition is an organization of (ideally) diverse interest groups that combines resources to affect a specific change the members are unable to bring about independently. They are usually temporary and disband once the stated goals have been accomplished.

Much of this document can be applied to campaign planning in a coalition setting, however, it takes additional capacity to engage in a coalition campaign. For instance, coordinating campaign calls with coalition members, facilitating coalition meetings and generating the written campaign plan all have to be done by someone. In a coalition setting, you must be very clear about whom that someone (or multiple people) will be and how to allocate resources based on those responsibilities.

Most often, organizations resort to coalitions upon realizing they don't have enough power to affect change on our own. Done well, they can build your power and help win the campaign. Done poorly, they can diminish your power and drain organizational capacity.

Coalition Best Practices

Here are some best practices when engaging with coalitions:

- **Set the partnership parameters.** Clearly establish the parameters of the coalition at the start: Who makes decisions? How are decisions made? Who speaks for the coalition? How will joint funding be handled? Consider crafting a Memorandum of Understanding or agreed-upon operating principles put into writing. Put ground rules into writing.
- **Develop a written campaign plan together.** This builds in accountability and reduces lone wolf behavior and side negotiations.
- **Determine the bottom line for negotiations on your demand.** Get very clear about what constitutes the bottom line position for the coalition that will not be negotiated away.
- **Acknowledge and be transparent about self-interest.** Organizations need to believe they are benefiting from coalitions. When each organization puts its self-interest on the table, all the partners can take those needs into account and talk about whether and how they can be met.
- **Speak up, but agree to disagree.** When a partner does something your organization disagrees with, communicate quickly, clearly and professionally. Honest, non-defensive

communication is key. However, recognize that not all coalition members will agree on all issues. Focus on your shared goals and avoid issues on which you do not agree.

- **Maintain regular contact with your partners.** Do this with regular in-person meetings and conference calls in-between meetings. During these meetings, review your campaign plan and make adjustments.
- **Coalitions live and die on trust.** You build trust by being honest, consistent and following through on your promises.
- **Plan for the time it takes to participate in coalitions.** Factor in the time it takes to participate in coalition work into campaign plans and work plans.

Also, consider the three things that most commonly blow up a coalition, as noted by Teresa Erickson, staff director of Northern Plains Resource Council:

- **Money.** The fight over resources is a major source of tension and a very real issue for coalition members. Mitigate this with MOUs, open and honest communication, and a clear campaign plan, constructed jointly. Crafting a campaign plan, which should include a budget, gets everyone on the same page about objectives, strategies and tactics, which makes it easier to see how resources need to be allocated.
- **Credit.** An organization's ability to survive and thrive often depends on the amount of public credit it receives. Ignoring that fact creates a huge fault line in the coalition and will likely result in trouble.
- **Deadwood.** Have an open and honest discussion about what each organization brings to the table and what the coalition needs to succeed.

Setting Ground Rules in a Coalition

Consider answering the following questions to help establish the operational ground rules for a coalition:

- Who can make decisions regarding the campaign?
- How will decisions get made (e.g., consensus, simple majority, 2/3 majority)?
- Who can speak for the coalition?
- Who will control and spend funds?
- What is the process for changing the campaign plan?

- How will disagreements be handled?
- How will the group ensure accountability?
- What are the ramifications if a participating group fails to complete a task?
- How will the coalition deal with lone wolf behavior by an individual group?

Topography of a Campaign Plan

Effective campaign planning is as much about process as it is about the written plan itself. In the course of conducting research for this guide, we found a spectrum of campaign planners, ranging from those who always create a written plan but do not have a formal process for creating the plan to those who have a solid process but rarely, if ever, generate a written plan. We recommend using a deliberate process and creating a written plan.

In this section of the guide, we'll describe the elements of a solid written campaign plan and considerations for formulating them for your campaign. Remember that writing your campaign plan down is vital.

We call it the "Topography of a Campaign Plan" because the 13 elements we've included here are the significant features of your planning landscape. Topography is the process of studying the features of land and the process of making maps. In this case, you are making a map of your campaign. By thinking about, discussing and mutually agreeing on these 13 elements with campaign partners, you will have mapped out a campaign that is smart, strategic and successful.

<u>Topography of a Campaign Plan</u>	
1.	Lay of the Land
2.	Goals and Objectives
3.	Targets
4.	Theory of Winning
5.	Potential Opponents and Allies
6.	Resources and Assets
7.	Strategies and Tactics
8.	Messages
9.	Messengers and Media Strategy
10.	Campaign Needs
11.	Budget and Fundraising Plan
12.	Evaluation
13.	Timeline

1. LAY OF THE LAND

The lay of the land section sets the stage for the rest of the campaign plan. It considers both the external and internal contexts of the campaign. Through this discussion, you begin to sketch out what becomes the roadmap for your campaign plan. You take a look at the myriad other factors affecting your issue, acknowledge obstacles, consider other perspectives and perform a reality-check on your ideas. In doing so, you co-create the foundation of your campaign.

Co-creating a campaign with meeting participants (rather than writing a plan and sharing it with other participants for their approval at a planning meeting) is the most effective way to ensure that planning participants understand, agree and will participate in campaign decisions and subsequent efforts. Getting consensus from meeting participants in the lay of the land discussion sets a tone of inclusiveness and cohesion that can help bind the campaign and make everyone feel listened to and acknowledged.

One note: When working in a coalition setting, this section can often be the most contentious. This is where some of the key elements of your campaign plan will begin to surface in discussion: your goals, strategy, key tactics, etc. It is also where you'll begin thinking about external and internal influences on your campaign and what their presence means for your work. You will have better success if you recognize going into this discussion that it has two goals: 1) to establish the context that your campaign operates in and influences your efforts and, 2) to establish a foundation of respect and openness, where all coalition voices are heard and acknowledged.

External Context

Sometimes as passionate advocates, we become myopic in our quest to make the changes we seek. Our issue looms large in our mind and crowds out other issues. In doing so, we forget to consider the wider context surrounding our work. Political consultant Joel Bradshaw explains that this is where most campaigns start to go wrong, "Before you can follow the organizing adage, 'Start where they are, not where you are,' you need to understand where your target audience is starting from. To do that, you have to look beyond your immediate issue." These external considerations have a profound impact on the success of our campaign. In this section, consider the following questions:

- What is going on here?
- What are the topics our target audiences are most concerned with?

- What is the economic context?
- What is the political climate?
- Who are the key decision-makers and what are their priorities?

Internal Context

Describing the history of an issue and its current status also helps set the context for a campaign. This section is important because it begins to build the case for the campaign. Some of this language may be used later in fundraising efforts or education material, but it's also important because it captures institutional memory. In the case of staff turnover, this description of the issue and its evolution can be invaluable.

Consider the following questions when writing this section:

- What is the history of the issue?
- How has the issue changed over time?
- What is the current status of the issue?
- How could this issue develop in the future?
- Are there clear patterns in how this issue has evolved, and how could these patterns affect your campaign?
- What kind of opposition have you faced or are you likely to face? What are the issues, concerns and priorities of the opposition?
- Who else is working on this issue? What interest groups, organizations and individuals have been involved with it?

We are not fit to lead an army on the march unless we are familiar with the face of the country—its mountains and forests, its pitfalls.
—Sun Tzu, On the Art of War

This section should not be an exhaustive history of the issue, but should provide adequate context enough so that everyone understands where you are starting. It should also be corroborated by others in the campaign, since this will be referred to often after the campaign has been launched.

2. GOALS AND OBJECTIVES

This section describes specific goals and objectives for your campaign. This is one of the most important sections in the campaign plan and, accordingly, it is common to spend the bulk of a campaign planning meeting agreeing on these. Because everything flows from this section, being clear about your goals is paramount.

Devising Goals

Broad and visionary goals can be useful in helping you see the bigger picture and how specific actions are connected, but these are best left to the level of organizational strategic plans. Campaigns run best when there is a specific goal being sought; it can be a bit risky for issue campaigns to be visionary or broad, because it can make it nearly impossible to win them.

Campaign Planner Tip:

Treat campaign goals as very specific and achievable, not wishful thinking.

When creating your goals, make sure you consider the long-term outcomes of your goal. Is your solution time-bound?

What will happen when that time expires? Are there communities that may be affected by your proposed solution that you have not consulted? What might happen if your solution is wildly successful? What might the effects look like in 5, 15 or 50 years?

Goals vs. Objectives

Goals and objectives are sometimes used inter-changeably, even in a few of the templates we reviewed for this guide. This is where some campaign planning meetings can disintegrate into linguistic debates. We'll provide guidance on goals versus objectives as we use them in this document, but do not get so hung up on teasing out goals from objectives that it grinds your planning to a stop. They are both important for a campaign plan, but serve different purposes. The bottom line is that your campaign plan must define what you are trying to achieve in a clear, succinct way.

GOAL EXAMPLE:

Create programs to fund consumer energy efficiency at three municipal electric utilities in Southern Wisconsin by 2016.

The intermediate steps to achieve your goal are your objectives. Objectives are precise, measurable, time-phased results that support the achievement of a goal and these intermediate steps are critical. Many campaigns operate in phases (e.g., bill introduction, committee vote, floor vote). Each phase can be an objective under the same goal. Alternatively, some organizations describe short-medium-and long-term goals. Use a format that makes sense for your particular campaign.

Before committing your objectives to your written campaign plan, pause to confirm that your objectives meet the SMART criteria. Crafting SMART objectives will help you maintain focus, campaign discipline and an efficient use of your resources.

Are they:

- **Specific?** Is it clear what is included in the work and what is not?
- **Measurable?** Is there a way to know when you've succeeded?
- **Achievable?** Is it realistic to assume you can accomplish this with the context you are operating in?
- **Relevant?** Does the objective sync up with your goal?
- **Time-bound?** When will you have a decision? When will you know if you have been successful?

“Is that a goal or an objective?”

This debate has stalled many good campaign planning processes.

Bottom line: Your campaign plan must clearly articulate what you are trying to achieve, and what you are trying to achieve should be specific, measurable, achievable, relevant and time-bound.

OBJECTIVES EXAMPLE:

Goal: Create programs to fund consumer energy efficiency at three municipal electric utilities in Southern Wisconsin by 2016.

Objectives:

- 1) Develop and share model energy efficiency programs report with utility staff in 2014
- 2) Conduct residential survey of electricity costs in spring 2014
- 3) Organize citizen outreach effort to municipal utilities in summer 2014
- 4) Develop pilot program to pitch to Mount Horeb Utility, Stoughton Electric Utility and Sun Prairie Utilities in fall 2014.
- 5) Pitch pilot programs to Mount Horeb Utility, Stoughton Electric Utility and Sun Prairie Utilities in 2015

Types of Goals

All campaigns should include both **programmatic** and **organizational** goals. Programmatic goals describe the desired external outcome of the campaign (e.g., pass a new renewable energy standard in X state in the 2015 legislative session). Organizational goals ensure that the campaign leaves the organization stronger than when it began, regardless of the campaign outcome (e.g., identify three new leaders). Setting the intention to build your organization's power at the outset of a campaign is the best way to make sure it happens. You do this by embedding it into your campaign plan. For example, in the goal section, consider including power-building goals such as organizing a new constituency, developing new leaders, raising your profile, increasing grassroots connections, enhancing media relationships, increasing grassroots activists, new foundation relationships, etc. Of course, these types of goals will also require SMART objectives. Midwest Academy, Sierra Club and Western Organization of Resource Councils routinely include power-building goals into their campaign plans.

Campaign Planner Tip:

Always make a goal to become a stronger organization, coalition or leader. That is how you still win if you lose.

3. TARGETS

Power is the heart of this section. Here not only will you consider who your target is but how much power they have and how much power you have comparatively. You may decide to conduct a formal power assessment of your organization to understand how much power you have to sway your target; RE-AMP's Organizing Hub can help you do this.

Who is a Target?

Targets are decision-makers who have the power to give you what you want. When assessing who your target is, you should always target the person who you have the best chance of moving *and* can meet your demands. Remember that decision-making bodies are made up of individuals and are not monolithic. **Targets are always individuals**, never groups of people or institutions. Targets have to have names to be effective. For example, the “legislature” or “the public” are not effective targets for a strategic campaign.

Your targets may be different individuals as the campaign progresses. For instance, in the first phase of your campaign, you may target the chair of the Senate energy and environment committee. Once the bill passes the committee, your targets will change to another subgroup of the Senate. Find out everything you can about the way the governing body operates to be sure your targets are accurate.

Primary Targets vs. Indirect Targets

Primary targets are those individuals who have the power to deliver a victory for you. An indirect target is an individual who can get the primary decision-maker to do what you want. These are individuals who have direct influence over your target. They are sometimes called agents of change, secondary targets or grasstops.

What enables a wise sovereign and the good general to strike and conquer, and achieve things beyond the reach of ordinary men, is foreknowledge. This foreknowledge cannot be elicited from spirits; it cannot be obtained inductively from experience, nor by any deductive calculation. Knowledge of the enemy's dispositions can only be obtained from other men.
—Sun Tzu, On the Art of War

Though it can be tempting to brainstorm an exhaustive list of indirect targets, for your campaign plan, an indirect target must be able to do two things:

- 1) Agree with your position. Does this person share your goals?
- 2) Be able to persuade the primary target. Would they be willing to use their connectedness to further your goal?

A note about language: When working with community members, the term, “target” can be perceived as hostile. While common in the advocacy community, be sensitive to the way it is perceived by individuals who are not immersed in issue advocacy work. Many community organizers use the term “decision-makers” or even “human decision-makers” instead.

Understanding your Targets

You’ll need to thoroughly understand your targets before you can figure out how to move them effectively. Consider the following:

- What are their values, experiences and frame of references and how will those things impact their decision on this? What motivates them? What do they care about?
- Who do they listen to?
- What media outlets do they rely on?
- What are their outside affiliations?
- If an elected official, what is their political context? For example, are they vulnerable or safe? What is the vote distribution in their district?
- If an elected official, what do you know about their district?
- If not an elected official, what do you know about their community? (e.g., local businesses, major employers, etc.)
- Who are their activists, donors and influentials?
- Can you recruit messengers in their district?
- What other major issues may they be facing right now? How will your issue command or compete for your target’s attention?

Power Mapping

Power comes from many places. For legislators, it comes from voters, votes from other legislators, campaign supporters and tenure in office. For CEOs, it may come from personal wealth. For agency heads and other high level bureaucrats, it comes from the executive who appointed them.

For those involved in the policymaking process, power generally comes in three forms: Money, relationships and information. These sources of power are not equal, however. Of the three, information pales in comparison to the power that comes from money and relationships. Our power as advocates generally lies in relationships and information. We will never have the amount of money our opponents often have. And since information is a distant runner-up as a source of power, this means power for us is largely about people and the relationships among them. Understanding this and then intentionally building and leveraging our power are critical to our success. This is where power mapping comes in.

Power mapping looks at key decision-makers and identifies ways to reach them. Power mapping is an exercise routinely performed by campaign organizers, and ways to power map vary, but all good power maps share core elements: an assessment of who has influence on your targets, including professional and personal relationships, and paths to gain influence on those targets. Power maps can be used for many purposes: to analyze the political landscape of a city, county, state, etc. around competing long-term agendas; to look at the power relationships of a specific issue; to analyze the power relationships surrounding a specific decision-maker, and more.

A power map is useful for many reasons:

- It creates a simple way for a group of people to share and visualize the knowledge they have about key individuals in the campaign;

Power determines the outcome. If two or more groups care about an issue, and one of them has a lot more power, that group will get what it wants, no matter what the facts are or who will be hurt.

—Organizing Handbook, Center for Health, Environment and

If you neglect to analyze the power relationships in a campaign, you should probably not launch it in the first place.

—Kevin Williams, Western Organization of Resource Councils

- It can help inform strategies to reach key decision-makers to make spending campaign resources more effective; and
- It provides a shared understanding of the power relationships involved in the campaign.

The Center for Health, Environment and Justice’s Organizing Handbook states, “Power determines the outcome. If two or more groups care about an issue, and one of them has a lot more power, that group will get what it wants, no matter what the facts are or who will be hurt.” Thus, the way to change the outcome is to change the power dynamic.

Learn where your target derives his or her power. For example, elected officials draw their power from voters. Agency officials derive their power from elected officials. Private sector individuals, such as CEOs, usually derive their power from personal wealth or from trustees or shareholders who oversee their activities. Dig deep. Don’t assume you know where your targets derive their power based on your gut or cursory information.

Sierra Club routinely embeds power mapping directly into their campaign plans. Western Organization of Resource Councils suggests having a written campaign plan completed first to provide more detail on primary and indirect targets, allies and opponents, swing groups and unorganized constituencies.

We recommend developing power maps in a separate process because it takes a fair amount of time. There are certain individuals for whom it will invariably be useful to have power maps, such as a governor. These power maps can be developed outside of the context of a particular campaign. This is often preferable because you will want to engage expertise that is not part of your campaign. Whether completed during the campaign planning process or afterwards, analyzing power within the campaign is a critical step in the campaign’s success. For examples of power mapping, see Gail Francis’ 2012 guide on Power Mapping best practices for RE-AMP.

A good practice is to conduct a power assessment on your own organization or your coalition to identify where your power comes from. Power assessments can be helpful in the midst of a campaign in understanding how much power you have over your target. In this section, even if you elect not to conduct a formal power assessment on

*Power is not only what you have,
but what your enemy thinks you
have.*
—Saul Alinsky

your organization, spend some time getting into your target's head and looking at yourself. Where does your organization get its power and how much power does your target think you have? RE-AMP's Organizing Hub may be able to help you structure a power assessment. For a guide on conducting power assessments, see our Resources section at the end of this document.

4. THEORY OF WINNING

Most campaign planning templates specify strategies: the “how” of your campaign, but some also include the “why of the how,” or strategic rationale. Western Organization of Resource Councils calls this their “theory of winning,” and Sierra Club calls it their “strategic rationale.” This section provides an explanation of why you are choosing the path you have chosen. Why and how will your approach and strategies get you to where you want to go? Why are you selecting these strategies? How do these strategies get you to your goal? You can think of this as a meta-strategy or theory of change.

This is often a weakness for our campaign plans. We often fail to articulate why we are choosing the strategies we are choosing, and in doing so, we cannot fully evaluate whether our strategies are optimal for our goal. Getting our theory of winning on paper can allow us to question our assumptions and debate our strategies. This also enables us to more readily change course in our strategies when external factors change. By having an explicit theory of winning in our campaign plans, we can more easily judge when the underlying assumptions are no longer accurate or relevant.

THEORY OF WINNING EXAMPLE:

Municipal electric utilities comprise a large percentage of the service area in Wisconsin, yet have anemic programs to help consumers cut electricity usage. Research shows that the cost of energy efficiency investments is a major barrier for residential energy consumers. If each municipal electric utility had a strong and robust consumer energy efficiency program with a goal of reducing energy consumption 20 percent, it would have substantial impacts on carbon emissions. We are starting in south-central Wisconsin because we have good relationships with the municipal energy providers here, and because they are considered leaders by other municipal energy providers. If they become early adopters of a model program, others in the state are likely to follow suit.

5. POTENTIAL OPPONENTS AND ALLIES

Who is with us and who do we need to convince or neutralize? Here we describe our potential allies and our potential opponents. Note that at the beginning of a campaign, many groups will not have a position, or perceived allies may have conflicting interests and may end up opposing your campaign. Address this by acknowledging that these are *potential* allies and opponents.

Potential Opponents

List your expected opponents and the arguments they will use. You'll want to convert or neutralize as many potential opponents as possible and then prepare for those you can't influence. Expect opposition. Be ready. Do not wait to be surprised when opposition (inevitably) arises to your effort. Expecting opposition will mean that you will not be in the position of simply reacting, and it will allow you to neutralize potential opponents, or at least be several steps ahead of them. In this section, describe:

- Potential opponents
- The purpose of their opposition
- Tactics and arguments they may use
- Your strategy to counter the opposition

Most power occurs because one side is better organized than the other.

—Seth Godin, “What Happens When We Organize?”

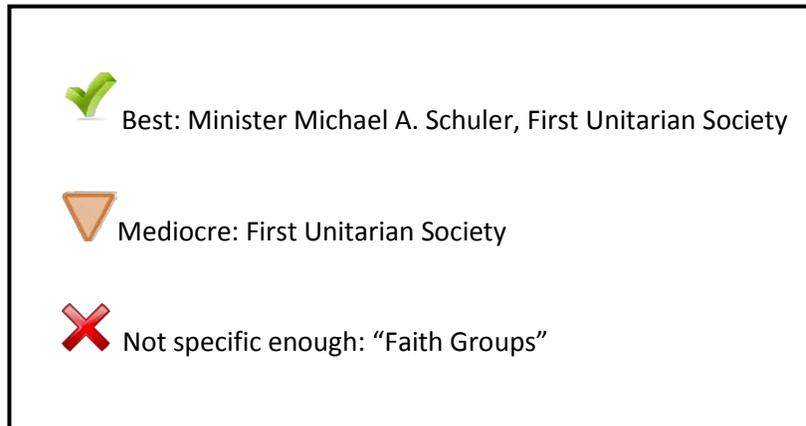
After listing your potential opponents, categorize and prioritize them. Deanna White from Clean Water Action in Minnesota suggests the following for determining how to direct your efforts:

- Against us and actively campaigning → Fight
- Against us but not doing anything → Neutralize
- Against us because friends are against us → Neutralize

For information on how to research your opposition on a shoestring budget, read Western Organization of Resource Council's “How to Research Corporations” and Center for Health, Environment and Justice's “Research Guide for Leaders.”

Potential Allies

Likely allies are those who have a strong self-interest and deep concern for the issue and low risk in joining you. Find out their self-interest by directly asking them what they need to get out of working with you to achieve your campaign goal. In this section describe your potential allies. As with your opponents, the more specificity, the better.



Unless you can run the campaign alone, try to identify **at least three likely allies**. Then try to identify **at least three unlikely allies**. The unlikely allies will often be the most effective messengers for your campaign. In your timeline, include the specific ways you plan to engage with allies.

Similar to your work in identifying potential opponents, you'll want to categorize and prioritize your efforts directed at potential allies. Consider the following categories of potential allies and their level of priority:

- Actively with us → Lower priority
- Should be with us and need to be activated → Focus
- With us but don't add significantly to the fight → Lower priority

To build real power, you often go beyond the familiar and cultivate a range of partners.

—Tools for Radical Democracy

6. RESOURCES AND ASSETS

Identify your campaign's resources and assets in this section. This is a way to ensure that you are tapping into all of your available assets and using them effectively. This will be easier if you have conducted an organizational power assessment/asset map before engaging in planning your campaign. For more information on organizational power assessments, see the Resources for Additional Reading. How much can you afford to invest in this campaign? Include:

- Financial resources available (e.g., grants or funding from general support for campaign)
- The number and kind of people available and committed (e.g., paid staff, volunteers and organizational members)
- Communication technologies
- Facilities and materials
- Information, data, guides, etc.
- Key relationships
- Other

Campaign Planner Tip:

Indicate which campaign actions are covered by current grants in your campaign plan. This ensures you know what actions still need funding in order to carry out, as well as ensures that grant deliverables are embedded into your campaign plan.

This need not be an exhaustive list, nor should it include items irrelevant to the campaign. You do not necessarily win if you have more assets than needs. However, by spending a few minutes thinking through this section, you may find that you have more resources than you initially assumed and you are more likely to be strategic in using those resources after cataloguing them.

7. STRATEGIES AND TACTICS

In this section, you'll need to describe your strategies and tactics. Simply put, your strategy should be the best way to get the target to give you what you want within your capacity. According to the authors of *Radical Democracy*, "Strategy development is not complicated, but it does require you to look at information, think deeply about it and decide how to act."

Strategies and tactics are the "hows" of your campaign. They flow from your goals, objectives and theory of winning and describe how you will ensure that your target hears your message. Strategies and tactics are typically the "meat" of your campaign plan (that is, they often take the most space) and should be as detailed as possible.

Spend some time thinking through the range of outcomes you will need to react and adapt to. For example, if your campaign goal is to pass a bill, how will you respond if it fails? What if it passes?

Strategies vs. Tactics

Just as the debate between goals and objectives can grind a planning process to a halt, the debate between strategies and tactics can lead to unnecessary wheel spinning. Though we provide guidance on what constitutes a strategy versus a tactic, you will invariably run into semantic questions about whether something belongs in one section of a campaign plan or another. The important thing is to not get too hung up on these questions, but to get your information down on paper.

Strategies are broad, overall priorities or directions about how to best accomplish the campaign's goals— they are general plans of attack. Tactics are specific steps within these strategies you will take along the way. See Appendix D for possible strategies and tactics. Grassroots organizing and alliance building efforts are typical strategies. A strong campaign plan will have detailed strategies for reaching each objective and detailed tactics for carrying out each strategy.

The best actions are within the experience of members and outside the experience of the target.

—Saul Alinsky

"Is that a strategy or a tactic?"

This debate has stalled many a good campaign planning process. Bottom line: your campaign plan must clearly articulate how you are going to achieve your goal, in as detailed a way as possible.

When choosing strategies, do so by considering whether each strategy will achieve the goal of convincing your target to support you and whether you have the capacity to employ the strategy effectively. While more than one strategy can be used, this will require more capacity. Also, keep in mind that strategies should build off each other and be synergistic rather than isolated efforts.

Campaign planner tip:

Don't waste time on a cool tactic that is popular with the group but doesn't actually reach your target.

Many participants enjoy planning tactics. These can be fun to plan, but consider some of parameters to tactics: they should be nonviolent, appropriate to the goal and effective for the target. When choosing tactics, try thinking like your target or even like your opponents. What tactics would make it more difficult for your target to ignore your demands? As notable community organizer and leader Saul Alinsky once said, "The best actions are within the experience of members and outside the experience of the target."

You'll also want to consider your return on investment on tactics. How much will the tactic cost versus what you will get out of it? Sometimes you do an action not because it furthers the campaign but because it builds the organization. That's okay. Whether executing a tactic because it will move your target or build your organization, be mindful of the costs, benefits and how they compare.

8. MESSAGE

In this section, provide your campaign message.

Campaign messages should be persuasive to your target audience and they should be tested. If you have not already tested them, describe how you will test your messages in this section as well.

Campaign planner tip:

Messages are crafted for your target audience... but remember you are not your audience.

What is a Message?

Every campaign needs a core message. A core message lets your audience know in simple terms what you are doing and why it matters. A message can come in the form of a single compelling sentence that captures the essence of what you are trying to accomplish. Or, it can be a paragraph that frames your story and delivers the key (most compelling) information. Your message should capture the essence of the issue at hand in the most accessible way possible. What is your campaign trying to accomplish and why? Who are the victims, the villains, the heroes? What is the problem and what is the solution?

Your message must create a connection with people. Your message is credible if it lines up with what they see and what they experience.

—Joel Bradshaw

Ideally, your campaign will develop a communications plan to feed into your campaign plan. If you do not have communications staff to help develop a campaign communications plan, Spitfire Strategies has great resources for campaign communications planning. See the Resources for Additional Reading section at the end of this document. If you do have a campaign communications plan, refer to it in this section and attach it to the written campaign plan.

What Makes a Good Message?

Political consultant and trainer Joel Bradshaw describes the five core components of a good message:

1. **Context.** Describing the context you are working in is important because you'll need to help people understand how they are connected to the issue.

2. **A statement of the problem you are trying to address.** What is the problem that you are trying to fix? Avoid jargon and arcane language. Describe the problem in a way that people outside of your organization can understand.
3. **Your proposed solution.** How will you fix the problem? Just as in the problem statement, your solution should be couched in easily accessible language.
4. **Contrast.** What sets your idea apart from that of your opponent or the status quo?
5. **Call to action.** What do you want people to do? Be clear and specific.

Effective messages appeal to people's emotions, as well as core, common values. Humans make decisions based more on emotions than rational thought. And when we appeal to core values, people feel a stronger connection to our issue and have a better understanding of our motivation. Good messages resonate with our audience because they create a connection through emotions and shared values. Information matters, but when it comes to motivating people to take action, emotions and values matter even more.

It is important to take into account what you learned from your lay of the land assessment. What other issues are your target audiences concerned with? How might your message conflict or support those issues? Who else is working on this issue? How will your message work with the message of your allies or others working on the same issue? Make sure the messages do not conflict with those of your allies.

While you do not need to embed an entire communications plan in the campaign plan, this section should include the following:

- Your core message
- Points in support of your core message (may be tweaked for different audiences)
- Campaign slogan (12 words or less)

Simpler is always better. Simpler messaging tends to have a more unifying and persuasive effect because it leaves less room for interpretation. For best results, think through the need to tailor a core message for differing subsets of your audience. For example, it could be beneficial to rethink the way you talk about your campaign in a presentation to doctors versus a church group or a local civic club.

When writing your campaign slogan, Bradshaw advises that you avoid vague or overly cute slogans, “The best campaign slogans sum up the campaign message. They are not necessarily clever or full of alliteration. They should be put on the end of your message to crystallize it for your audience.”

Message Tips

- Messages are crafted for your audience, not your planning committee.
- Keep it simple. The fewer words, the better.
- Be direct. Avoid nuance and jargon.
- Use pictures whenever possible to illustrate your point. Keep those pictures simple so there is less room for interpretation. (For example, a close-up of a smoke stack tends to be more effective than a full shot of a power plant.)
- Appeal to people’s emotions, as well as core, common values.
- Repetition, repetition, repetition. Repeat your message in as many media outlets as possible.
- Stay on message: Exercise message discipline when talking about the campaign.
- Test your messages with others, particularly with members of your target audience.

Always test your messages. Do not assume that your message resonates with your audience because it is backed by multitudinous data or because you like the way it sounds. Remember, you are not your target audience.

Finally, message discipline is paramount. Once you have crafted your campaign message and tested it with your target audience, stay on it. This can be one of the more difficult things to do once a campaign gets underway. Campaigners often go off message when they are attacked by opposition. Reacting reflexively to these distractions can take the campaign off course. When crafting your messages, prepare for your opposition’s response. A seasoned communications expert can help you craft messages that lay the ground work for rebuttals to your opposition. Campaign leaders and advocates can get bored or tired of their message after a while, but note that the average person has likely only heard the message once. As Democratic political consultant David Axelrod once said, “Here is the rule we follow with our clients: when the campaign staff and the reporters become physically ill over the repetition of the message, only then have you begun to penetrate the public consciousness.”

A note about visual communications: When crafting your communications plan, be mindful of how you can incorporate visual storytelling into your campaign. Our brains organize the world around us by processing visual information and with the advent of smartphones, digital cameras and iPads, it has become much easier to convey ideas through visual information— images. Knowing this and incorporating visual communications into your campaign strategy will make your campaign much more effective. For ideas on how to use visuals in your advocacy campaign effectively, see Resource Media's "[Seeing is Believing: A Guide to Visual Storytelling Best Practices.](#)"

If your organization (or coalition) has the resources, consider hiring a communications consultant if you do not have communications experts on staff. In our experience, message development is where environmental advocates tend to need the most help.

9. MESSENGERS AND MEDIA

In this section, you will describe how you will get your message out. You will list key messengers and spell out a media strategy for ensuring that your target hears your message.

Messengers

For many decision-makers, the messenger is the message and the person who shares the message is more influential than the actual words. Think carefully about who your target needs to hear from and equip them with your message. Effective messengers are people who your target audiences listen to and trust. Key messengers may be community leaders, news outlets, constituents, donors, etc. If engaging community members and leaders as messengers, get them on message. Make sure messengers have talking points or a message page and consider hosting a message training for key messengers.

Media

When you have developed your message, you'll need to find ways to share it. This is where your media strategy comes in. If creating a campaign communications plan, a media plan would be included in that. If you do have a separate campaign communications plan, simply refer to it in this section and attach it to the written campaign plan. If you do not have a separate communications plan, include your media strategy in this section. Be specific and realistic in regards to your capacity. Consider:

- Which media outlets will reach your target audiences?
- Which reporters do you need to target?
- Do you have an updated media database? What do you need to do to update it?
- What deliverables do you need to produce to provide to media outlets? (e.g., press kits, media advisories, fact sheets, news releases, informational reports, etc.)

If they hear about it once, they may ignore it. If they hear about it from another source, they may stop and think. If they hear about it one more time, they may actually do something. Our goal should be to figure out as many ways as possible to reach our target audience.

—Chris DeCardy, Former Executive Director of Environmental Media Services

- Who will develop those deliverables?
- Who will engage with the media and when? (e.g., pitch the story to reporters, conduct media briefings, get letters to the editor placed, book spokespersons on radio and TV, and use social media tools?)
- What is your budget for media engagement?

Note that each medium has strengths and weaknesses. For example, paid media can be effective for helping to maintain the drumbeat of your message but may not have a high level of impact, while earned media may make a big splash but will not be continuous.

Tracking your Media Hits

Often we fail to systematically track media hits in a way that allows us to strategically analyze our strengths and weaknesses over the long haul. Develop a simple way to track your media hits so that you can perform the analysis you need to of your campaign's media reach. You can download a simple, straightforward template from the RE-AMP commons by logging into the Commons and navigating here: <http://www.reamp.org/files/simple-way-to-track-earned-media/>

10. NEEDS

What do you need to make this effort successful? List the additional resources you need at this point. This will flow into the campaign budget, so the more granular you get, the better. Do not be tempted to write, "Money." All organizations need money. In this section, describe how you would use that money. Examples include:

- Information (in-depth analysis, research, etc.)
- New or deeper relationships with constituency X
- Office space for volunteers
- Equipment and materials
- Funding to move a staff person from half-time to full-time
- Volunteers for specific activities

11. BUDGET AND FUNDRAISING PLAN

You'll need to spend resources on this effort. By including numbers in your campaign plan, you are better able to set priorities and boundaries for your work. In this section, you'll create both a budget and if necessary (and it usually is), a fundraising plan.

Budget

Budgets tell your story in numbers. By indicating where and how you deploy resources, a budget will ground your effort in reality and clarify your priorities. Your budget will flow from your strategy and tactics, messenger and media, and needs sections. Create a line item budget to get maximum specificity and to enable you to create a fundraising plan, if necessary.

Be cognizant of how the campaign budget fits into the organization's budget and in particular, think about cash flow. If there is no general support funding available for this campaign and it cannot be supplemented from outside sources, it is especially important to think about how the campaign will pay for its activities. Note that as activities ramp up, you may hit a cashflow crunch. Try to avoid that by projecting your expenses and income (in daily, weekly or monthly increments) and budgeting well.

You may consider using the following template for a budget:

SAMPLE EXPENSE BUDGET

Staff salaries and benefits	\$
Polling	\$
Phone banking	\$
Paid media	\$
Technology	\$
Meeting expenses (venue, food, drinks)	\$
Travel	\$
Printing & copying	\$
TOTAL	\$

Fundraising Plan

Creating a fundraising plan is a natural next step. How much more money do you need and how will you get it? What is your plan to approach foundations, increase membership, bring in online donations, etc.? In this section, describe how you will obtain additional funds, including who will do what and when. Note that fundraising can be used to bring new supporters into a campaign. Once involved in a campaign as a financial supporter, they may find they want to get involved in other ways with the campaign such as talking to decision-makers or convening their friends and family members to learn more about the issue. They may also become interested in the broader organization. This is referred to as ascending the ladder of engagement. In this way, you can build your organization's capacity in multiple ways.

12. EVALUATION

Campaign evaluation is the process of monitoring the impact of your campaign on moving your target. Conducting an evaluation is much more effective if you build it in at the beginning of the process rather than trying to reverse-engineer the evaluation process midway through or at the end of a campaign. In this section, describe how you will know if your campaign strategies are working. You should evaluate four main elements of the campaign: progress in meeting your objectives; the impact of your actions; changes in power dynamics; and overall effectiveness of the campaign. Consider the following when writing this section:

- How will you know if actions are successful or on track to succeed? What are the indicators of success for the campaign?
- What systems do you have or need to put in place in order to measure the success of an action? (e.g. set up and conduct interviews, review records, count online advocacy actions taken during the legislative session)
- When will you review these measurements?
- Who will track your progress?
- How will the information be used to improve the effort?
- Have there been similar efforts to your campaign by other organizations? If so, what were their metrics and how did they use them?

Remember to include an evaluation of your organizational goals as well as your programmatic goals. Even if you do not win this particular campaign, your organization should be stronger for having run it and that should be captured in reports to your board, funders, allies, etc.

Policy change can take time, so plan for incremental success. You can do this describing your indicators of progress. How will you know you are moving toward your goal, even if you have not won your campaign yet? At the same time, build evaluation in at every action step of the campaign. To do this, make sure you debrief with other campaign leaders following the execution of every action step/tactic. Document what went right and what went wrong. Use this information to recalibrate your strategies and tactics as necessary.

13. TIMELINE

The timeline provides the most concrete sense of your campaign efforts by indicating the actions you'll take, when they will be performed and who will do them. Some organizations also tie this to their budget and indicate whether an effort will cost money and if it is covered by committed funding. Some organizations use the timeline as a basis of evaluation as well. In all cases, it can be used as a way to hold others in the campaign accountable.

To create your timeline, use "backward planning." Start with your end-goal decision point and work backward. Assess what steps are needed to accomplish your goal by that date and identify tasks along a timeline backward from the deadline to figure out when you need to start. Since your goal and objectives should be time-bound, these will provide natural goalposts in your timeline. You can use whatever format you prefer, but it may be easier to create a table with several columns for the action, date and individual responsible.

For example, let's say you want to send out direct mail appeals regarding an upcoming ballot initiative on November 3. Pull out a calendar and work backward from Election Day to understand when things will need to happen. When will you need to order voter lists? Create the materials? Print the materials? Get postage? Recruit volunteers to compile and send out mailings? Backward planning can help you understand when things need to get done so you are not caught by surprise when your final decision point draws near. Lay out the key steps for each action, tactic and/or phase of the campaign (how you do this depends largely on the campaign, but you'll probably want to use backward planning for major actions and events.)

SAMPLE TIMELINE

Timeframe	Activity	Responsible staff person	Cost

Updating Your Campaign Plan

Campaign planning is an iterative process. Power dynamics shift, opponents become neutralized, or new ones emerge. You carry out flawless tactics, but your target remains unmoved. Remember that campaign planning is as much about the process as it is about the written plan itself. Your campaign plan is a written reflection of the information you have at hand and how you will use it to move your target. As you move through your campaign, you will update your campaign plan based on new information, changes in power and your evaluation of how things are going.

When and How to Update Your Campaign Plan

As you enter into the campaign implementation phase, you engage in action. After every action, debrief with fellow campaign leaders. Did you conduct an event? Meet with leaders to debrief. Did you meet a campaign objective? Meet with leaders to debrief. Takes notes at the debrief session, because you will likely forget things afterward. Do this immediately following each action, and at most, within a week after the action is complete. In this debrief, evaluate the action. Did it work? Did it accomplish your goals? Did the target meet your demands? What did you learn about the target? Use these notes to retool your campaign plan at regularly scheduled campaign meetings.

Campaign Planner Tip:

With intense campaigns, consider holding campaign meetings as often as once per week.

Establish regular campaign meetings (e.g., bi-weekly, monthly, quarterly) with other leaders involved in your campaign. Decide how often you will conduct them and set those dates on the calendar in advance. Remember that you can always add more meetings as necessary, but setting these regular check-in points at the beginning of the campaign will ensure you have scheduled opportunities to revisit the campaign plan with fellow leaders. During these meetings, review the campaign plan. Review strategies, tactics, messages, budget, etc., based on the regular and ongoing evaluations you have been conducting. Are the messages effective? Are the tactics working? Are you able to get the attention of your target? Retool as necessary.

When evaluating your campaign, consider four main aspects to evaluate:

- Progress in meeting objectives

- Impact of your actions
- Changes in power dynamics
- Effectiveness of the entire campaign

It can be tempting to deviate from the plan once the campaign is underway and new opportunities and challenges arise. There is no bright line for knowing when you need to update your campaign plan or even throw it out and start again. But before you make significant revisions to your campaign plan, political strategist Joel Bradshaw suggests asking yourself this question: **“What about our initial assumptions has been demonstrated to be false?”** If you do not have a clear answer for this, think twice before making major revisions to the campaign plan.

You may need to make significant changes to your campaign plan when:

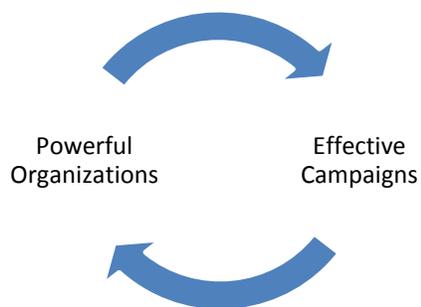
- The power dynamics have shifted (e.g., a new entity enters the fray and you now have significantly more or less power)
- Your target has changed (because of an election, change in rules, new appointment, etc.)
- Your strategies aren’t moving the target

Ending or Shifting Your Campaign

When your target gives you what you want, the campaign is over and you have won. Sometimes, however, it’s not that clear-cut, and organizations have a hard time knowing if the campaign is over. This is one reason why we recommend setting goals and objectives that are time-bound. Simply put, **the campaign is over if your actions are no longer moving a resistant target or achieving your objectives.** In this case, campaign leaders will need to consider the following:

- Should we move to a new phase in the campaign?
- Should we develop a different campaign with a new goal, target, strategies, etc.?
- Should we come back to this campaign at a later time?

When you end a campaign, **always debrief and evaluate.** Even if this campaign was not successful, you have no doubt learned important lessons along the way. Document that and let it inform future campaigns.



Note that power building and effective campaigns reinforce each other. When you run effective campaigns, you build your organization's power, and when you build your organization's power you dramatically increase your chance of winning your next campaign. You do this best by internalizing lessons learned from previous campaigns and running stronger campaigns the next time.

The Campaign Plan Document Formats

Strong and effective campaigns are planned, not serendipitous, and as the adage goes, “If it ain’t written down, it ain’t a plan.” Campaign plan formats vary from organization to organization (and even within organizations) and from campaign to campaign. What we’ve found after reviewing dozens of campaign plans and campaign plan templates is that there simply is no single magic format for a good plan. We realize that this can either be liberating or terrifying, depending on your personality, so we try to walk the middle path by refraining from imposing a particular structure on campaign plans and recommend that every campaign planning process consider the core elements of an effective campaign plan, which you’ll find in our Topography of Campaign Plan.

If you find it liberating to hear that there is no single magic format for your campaign plan, you may want to skip this section. However, many planners find it useful to begin with some structure and modify it to suit their needs. You may find one of the following structures useful to begin your planning.

Matrix

Midwest Academy and the State Environmental Leadership Program use a matrix format for campaign plans. The advantages of this format are that it keeps targets, tactics, timeline, etc., all grouped together by objective, making it easier to think through the particular considerations for each objective. It also makes the plan look neat and organized. Here is an example:

Goal:				
Objectives	Target	Strategies & Tactics	Desired Outcomes	Timeline

Linear Narrative

This was by far the most common format for campaign plans we reviewed. In many cases, organizations start with a campaign planning template that has sections for each core element, and they complete the document using narrative in a linear fashion. The guideposts for formats like this

are similar to the elements in our Topography of a Campaign Plan, but of course, vary by organization. Here is an example of what this might look like:

- I. Lay of the Land
- II. Goals and Objectives
- III. Targets
- IV. Theory of Winning
- V. Potential Opponents and Allies
- VI. Resources and Assets
- VII. Strategies and Tactics
- VIII. Messages
- IX. Messengers and Media Strategy
- X. Campaign Needs
- XI. Budget and Fundraising Plan
- XII. Evaluation
- XIII. Timeline

Question and Answer

Some campaign plans are much simpler and use a series of questions to guide the planner. Democracy Centre and Will Steger Foundation guide the process in this way. Democracy Centre recommends planning advocacy campaigns based on a sequence of nine questions:

1. What do we want?
2. Who can give it to us?
3. What do they need to hear?
4. Who do they need to hear it from?
5. How do we get them to hear it?
6. What have we got?
7. What do we need to develop?
8. How do we begin?
9. How will we know it's working, or not working?

Matrix and Narrative Hybrid

This format takes elements of the previous structures and combines them. Here's an example:

- I. Lay of the Land
- II. Theory of Winning
- III. Goals, objectives, targets, strategies and tactics, timeline and outcomes:

Issue Goal: Adopt high-performance building codes in City X by 2015				
Objectives	Target	Strategies & Tactics	Timeline	Desired Outcomes
Objective 1	Mayor X	Strategy 1	Feb 2014	
		<ul style="list-style-type: none"> • Tactic 1 • Tactic 2 	June 2014	
Objective 2	City Council members X,Y,Z	Strategy 2		
		<ul style="list-style-type: none"> • Tactic 1 • Tactic 2 	March 2014	
		Strategy A	August 2014	
		<ul style="list-style-type: none"> • Tactic 1 • Tactic 2 		

- IV. Potential Opponents and Allies
- V. Messages and Media Strategy
- VI. Messengers
- VII. Resources and Assets
- VIII. Budget and Fundraising Plan
- IX. Campaign Needs
- X. Evaluation

Writing the Campaign Plan

We can't say this enough. ***Have a written campaign plan.*** Ideally, a staff member would draft the campaign plan after the planning meeting and circulate it to meeting participants within 48 hours after the meeting. The written plan is based on the dialog and decisions made at the meeting, but should be spearheaded by a single individual or a small group. Decide at the meeting who will draft the plan and when participants can expect to see it.

As your campaign gets underway, you will update your plan based on changing power dynamics, ongoing evaluations of your efforts, initial assumptions that have proven to be incorrect and other factors. This comes with the territory of campaign planning. Campaign planning is an iterative process. As written campaign plans are updated, always make sure campaign partners have the most current version.

Conclusion

There's an old adage that says, "It's not that most plans fail. It's that most people fail to plan." When we take the time to plan, we use our resources better, stay focused, can more effectively build our power and capacity, **and are much more likely to win.**

The essence of good campaign planning is not mystical. *Decide what you want. Make a plan. Write it down. Work on it every single day. Revisit and revise. Keep going till you get there.*

Include the core elements found in the Topography of a Campaign Plan and make sure you are evaluating and revising along the way. Be intentional about building your own organization's power, despite what may come in terms of your success on the specific campaign. No matter the outcome of this campaign, your next campaign will be all the stronger for it.

Resources for Additional Reading

Advocacy Databases

Tools for Radical Democracy: How to Organize for Power in Your Community by Joan Minieri and Paul Getsos, 2007. Chapter Six: Uploading Technology

Engagement Organizing: The Culture and Technology of Building Power. Matt Price and Jon Stahl. Fall 2012.

The 2014 Field Guide to Software for Nonprofits: A Quick Guide to Essential Software for your Organization, Idealware, 2014.

Campaign Evaluation

Community Toolbox, A Framework for Program Evaluation: A Gateway to Tools:
<http://ctb.ku.edu/en/node/1227>

Community Toolbox, Our Evaluation Model: Evaluating Comprehensive Community Initiatives:
<http://ctb.ku.edu/en/node/24>

Community Toolbox, Gathering Information: Monitoring Your Progress:
<http://ctb.ku.edu/en/node/1287>

Campaign Planning

How to Develop a Winning Strategy, Western Organization of Resource Councils.
<http://www.Western Organization of Resource Councils.org/userfiles/Develop-a-Winning-Strategy.pdf>

Sierra Club Grassroots Organizing Training Manual, 1997.

Tools for Radical Democracy: How to Organize for Power in Your Community by Joan Minieri and Paul Getsos, 2007.

“The Just Enough Planning Guide: A Roadmap to Help Nonprofits Reach Their Campaign Goals,” by Spitfire Strategies

Organizing Handbook: How to Build a Strong Organization and Define Winning Strategies published by Center for Health, Environment and Justice, 2012.

Coalitions

“Working Together: A Toolkit for Cooperative Efforts, Networks and Coalitions,” Institute for Conservation Leadership.

“Building and Joining Coalitions,” in Organizing for Social Change by the Midwest Academy.

“How to Work in Coalitions” Western Organization of Resource Councils, 2010.

Power Mapping

“The Path to Power: Best Practices in Power Mapping,” Gail Francis, REAMP, 2012.

Power Analysis: Don’t Campaign Without it! Western Organization of Resource Councils, 2012.

Message

“Communications Planning Workbook,” by Resource Media

“Seeing is Believing: A Guide to Visual Storytelling,” by Resource Media

“Spin Works!” Spin Project (out of print but available by PDF: <http://spinacademy.org/wp-content/uploads/2012/04/SPIN-Works.pdf>)

Opposition research

Western Organization of Resource Council’s “How to Research Corporations”

Center for Health, Environment and Justices, “Research Guide for Leaders”

Organizational Power Analysis/ Asset Mapping

Tools for Radical Democracy: How to Organize for Power in Your Community by Joan Minieri and Paul Getsos, 2007. Chapter Eight: Researching the Politics of an Issue

State Environmental Leadership Program, "Power Analysis Process Guide"

References

Allison, Michael and Jude Kaye. "Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook." The Support Center for Nonprofit Management. 1997.

Bradshaw, Joel. Phone interview, 22 May 2014.

Bray, Robert. Spin Works! A Media Guidebook for Communication Values and Shaping Opinion. Independent Media Institute, 2002.

Belz, Rachel. Ohio Citizen Action. In person interview, 25 February 2014.

Center for Health, Environment and Justice. Organizing Handbook: How to Build a Strong Organization and Define Winning Strategies. March 2010.

Clean Wisconsin. Campaign Plan template. 2012.

Davis, Bill. Independent consultant. In person interview, 7 March 2014.

Denherder-Thomas, Timothy. Grand Aspirations. Email interview, 1 March 2014.

Elder, Jane. Communications Strategy Planning Template. July 2007.

Gavin, Melissa. "Power Analysis Process Guide" State Environmental Leadership Program, 2011.

Godin, Seth. "What Happens When We Organize?"
http://sethgodin.typepad.com/seths_blog/2008/04/what-happens-wh.html. Accessed 2 April 2014.

Hollister, Don. Ohio League of Conservation Voters. Phone interview, 12 March 2014.

Kaner, Sam. "Facilitators Guide to Participatory Decision-making." Jossey-Bass, 2007.

Minieri, Joan and Paul Getsos. Tools for Radical Democracy: How to Organize for Power in Your Community. Wiley, John & Sons, 2007.

Midwest Academy. Strategy Chart. http://www.tcsg.org/sfelp/toolkit/MidwestAcademy_01.pdf. Accessed 6 March 2014.

Morrison, Don. Dakota Resource Council. Phone interview 9 January 2014.

Mulkoff, Sarah. Michigan Environmental Council. Email interview 5 March 2014.

Natural Resources Council of Maine, Campaign Plan Template. November 2012.

Ohio Citizen Action. Campaign Planning Template. March 2014.

Price, Matt and Jon Stahl. "Engagement Organizing: The Culture and Technology of Building Power." 2012.

Resource Media, "Seeing is Believing: A Guide to Visual Storytelling." Undated.

Rosenberg, Ralph. Iowa Environmental Council. Phone Interview 24 February 2014.

Sierra Club. Grassroots Organizing Training Manual. 1999.

Sierra Club. Sierra Club 2014 Campaign Planning Matrix. 2014.

Spitfire Strategies, "The Just Enough Planning Guide: A Roadmap to Help Nonprofits Reach Their Campaign Goals." Undated.

Sprechmann, Sofia and Emily Pelton. "Advocacy Tools and Guidelines: Promoting Policy Change. A Resource Manual for CARE Program Managers." Cooperative for Assistance and Relief Everywhere, 2001.

State Environmental Leadership Program. Campaign Plan Template. 2010.

Strand, Scott. Minnesota Center for Environmental Advocacy. Phone interview 6 March 2014.

The Campaign Plan. Wellstone Action.

http://www.wellstone.org/sites/default/files/attachments/The-Campaign-Plan_1.pdf. Accessed 6 March 2014.

The Community Tool Box, University of Kansas. Outline for Planning an Advocacy Campaign. <http://ctb.ku.edu/en/advocating-change>. Accessed 17 March 2014.

The Democracy Centre. Nine Steps to Plan Advocacy Campaigns.

The Praxis Project. Advocating for Better Policies. http://www.unnaturalcauses.org/assets/uploads/file/UC_PolicyAdvocacy.pdf. Accessed 18 February 2014.

Tzu, Sun, *On the Art of War. Roots of Strategy*, Edited by Brig Gen. T.R. Phillips, Stackpole Books, 1985.

Wegner, Amanda. Clean Wisconsin. In-person interview 19 February 2014.

Western Organization of Resources Councils, "How to Develop a Winning Strategy." 2006.

Western Organization of Resources Councils, "How to Research for Organizing." Undated.

Western Organization of Resources Councils, "How to Work in Coalitions." 2010.

Western Organization of Resources Councils. "Elements of a Campaign Plan." Undated.

Western Organization of Resources Councils. "Power Analysis: Don't Campaign without it!" September 2012.

Western Organization of Resources Councils. In person Interview: Kevin Williams 2 February 2014.

White, Deanna. Clean Water Action. Phone interview 7 November 2013.

Will Steger Foundation. Take Action Guide. Undated.

Williams, Kevin. "Identifying the Right Issue." Western Organization of Resources Councils. June 2010.

Williams, Kevin. "Tips for Running Issue Campaigns." Western Organization of Resources Councils.

Appendix A: Topography of a Campaign Plan

The following elements are part of a strong campaign plan, which is the result of intentional planning and strategic thinking. While different formats may work better for different campaigns and organizations, the following elements should be considered when planning a campaign:

1. Lay of the Land
2. Goals and Objectives
3. Targets
4. Theory of Winning
5. Potential Opponents and Allies
6. Resources and Assets
7. Strategies and Tactics
8. Messages
9. Messengers and Media Strategy
10. Campaign Needs
11. Budget and Fundraising Plan
12. Evaluation
13. Timeline

Appendix B: Campaign Planning Discussion Guide

Throughout this text, we've included many questions for you to consider during the campaign planning process. This Campaign Planning Discussion Guide brings those questions together and may be helpful in shaping the conversation during your next planning process.

Lay of the Land

1. What is going on here?
2. What are the topics our target audiences are most concerned with?
3. What is the economic context?
4. What is the political climate?
5. Who are the key decision-makers and what are their priorities?

Targets

1. Who can give you what you want (Primary targets)?

2. For each primary target:
 - What are their values, experiences and frame of references and how will those things impact their decision on this? What motivates them? What do they care about?

 - Who do they listen to?

 - What media outlets do they rely on?

 - What are their outside affiliations?

 - For elected officials:
 - What is their political context? (e.g., are they vulnerable or safe? What is the vote distribution in their district?)

 - What do you know about their district?

 - If not an elected official, what do you know about their community? (e.g. local businesses, major employers, etc.)

- Who are their activists, donors, and influentials?

- Can you recruit messengers in their district/ community?

- What other major issues may they be facing right now? How will your issue command or compete for your target's attention?

3. Who agrees with your cause that can influence your target? (Secondary targets)

4. How much power do you have currently to influence your target?

Theory of Winning

Why are you selecting these strategies? What is the cause and effect logic by which you will convert resources to outcomes?

Potential Opponents and Allies

Allies

1. Who are your likely allies?
2. What is their self interest?
3. Who might be an unlikely ally?
4. Of these, which will you prioritize in your efforts?

Opponents

1. Who are your potential opponents?
2. Of these, which will you prioritize in your efforts?
3. What is the purpose of their opposition?
4. What tactics and arguments might they use?
5. What will your strategy be to counter the opposition?

Resources and Assets

How much can you afford to invest in this campaign? Consider the number and kind of people available and committed (e.g., paid staff, volunteers and organizational members); financial resources available (e.g., grants or funding from general support for campaign); communication technologies; facilities and materials; key relationships; etc.

Strategies and Tactics

How will you use your resources to move your target? List your key strategies and tactics.

2. How will your message work with the message of your allies or others working on the same issue? Or what steps will you take to ensure that it does?

3. How will you test your message?

- Who will engage with the media and when? (e.g., pitch the story to reporters, conduct media briefings, get letters to the editor placed, book spokespersons on radio and TV, and use social media tools?)

- What is your budget for your media engagement?

Campaign Needs

What do you need to make this effort successful? Be specific.

1. Relationships:

2. Information:

3. Materials/ equipment:

4. Volunteers:

5. Other:

Budget and Fundraising Plan

	Budgeted expense	Committed	To be raised
Staff salaries and benefits	\$	\$	\$
Polling	\$	\$	\$
Phone banking	\$	\$	\$
Paid media	\$	\$	\$
Technology	\$	\$	\$
Meeting expenses (venue, food, drinks)	\$	\$	\$
Travel	\$	\$	\$
Printing/ copying	\$	\$	\$
Administration/ Overhead	\$	\$	\$
Miscellaneous	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
Total	\$	\$	\$

Fundraising

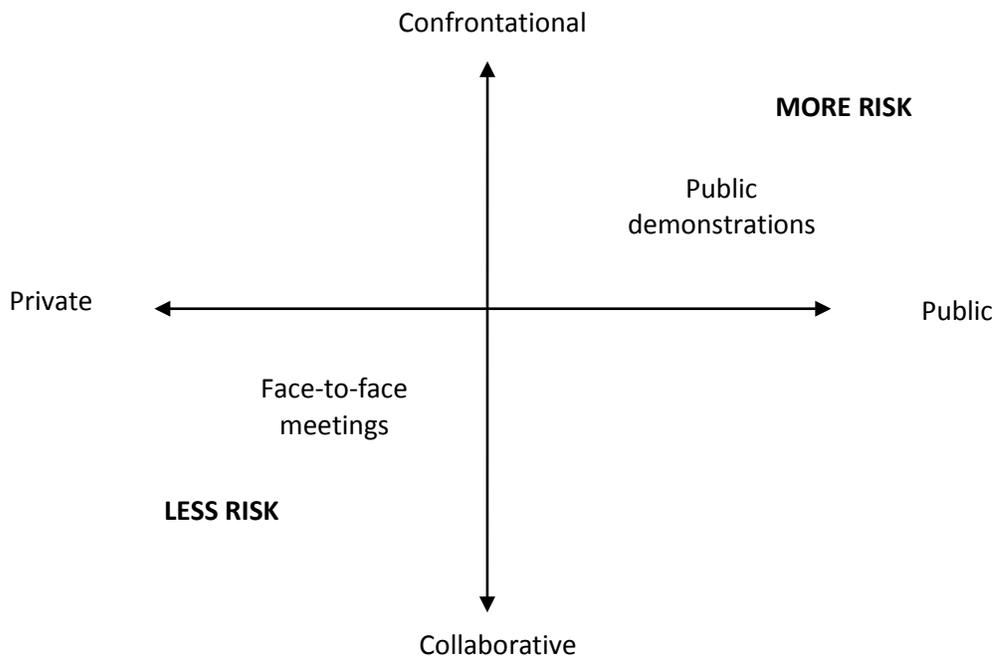
How much more money do you need and how will you get it? What is your plan to approach foundations or increase membership, etc.? Who will do this?

Evaluation

1. What will be evaluated?
2. What criteria will be used to judge program performance?
3. What standards of performance on the criteria must be reached for the program to be considered successful?
4. What evidence will indicate performance on the criteria relative to the standards?
5. What conclusions about program performance are justified based on the available evidence?

Appendix C: Strategy Selection

Choose strategies based on whether they will be effective for reaching your goal, whether your organization has the capacity to effectively carry them out, and whether they are congruent with your organization's culture (e.g. collaborative vs. confrontational, etc.). Be mindful of the risks you may take on in this campaign and weigh them against your possible returns. Do you have the capacity to carry a strategy out effectively? If not, it is likely not worth the risk. Will a particular tactic alienate your allies? Shift public opinion against your organization? Consider risk versus return when choosing strategies and tactics. The following diagram depicts strategies based on approaches and risk.



Credit: Sprechmann, Sofia and Emily Pelton. "Advocacy Tools and Guidelines: Promoting Policy Change. A Resource Manual for CARE Program Managers."

Appendix D: Possible Strategies and Tactics

Strategy development is not complicated, but it does require you to take a clear-eyed look at information, think deeply about it and decide how to act based on what you know. To do that, figure out the best way to get the target to give you what you want that is within your capacity. Always choose strategies and tactics based on solid research on your target and/or a well-informed power map, not because they've worked for other campaigns, are trendy or seem effective based on perfunctory research.

Advocacy: Establishing, defeating or changing laws, rules, policies or procedures that affect the issue. Tactics may include:

- Passing or changing a local resolution or ordinance
- Passing or changing a state law
- Passing or changing a federal law
- Administrative rulemaking
- Moratoriums
- Mandated studies

Alliance-building: Building power through partnerships and combining organizational strengths.

Tactics may include:

- Convening
- Joint projects/actions
- Short-term partnerships
- Formal coalitions
- Coordinated campaigns

Corporate: Working with private entities to change internal policies and practices. Tactics may include:

- Good neighbor agreements
- Volunteer agreements
- Stockholder organizing
- Boycotts

Direct Action: Controlled interaction/confrontation with a target. Tactics may include:

- Accountability sessions
- In-district meetings
- Public hearings
- Rallies and marches
- Public demonstrations
- Town hall meetings
- Lobby days
- Call-in days
- Patch-through phone-banking

Disruption: Interrupting the target's day-to-day schedule or interfering with normal operations.

Tactics may include:

- Pickets
- Strikes
- Sit-ins
- Boycotts
- Disrupting public meetings
- Civil disobedience

Electoral: Affecting the outcome of an election. Tactics may include:

- Voter registration
- Voter education
- Get out the vote efforts
- Candidate education
- Citizen initiative or referendum

Grassroots Organizing: Capacity building to increase the core strength of your organization.

Tactics may include:

- Petitions
- Canvassing

- Flyering/leafleting
- Phone-banking
- House meetings/neighborhood meetings
- Leadership trainings

Legal: Using the legal system to put pressure on your target. This supports but does not replace main power-building strategies. Tactics may include:

- Lawsuits
- Negotiation
- Enforcement
- Permit challenges
- Precedent setting

Media and public education: Raising an issue in the public consciousness. Tactics may include:

- News conferences
- News articles
- Op-eds
- Special features
- Letters to the editor
- Print, radio, cable, and web ads
- Blogs
- Social media: Twitter, Facebook
- Flash video
- Street theater
- Flyering/ leafleting
- Banner drop
- Yard signs
- Polling

Targeted information sharing: Serving as a trusted resource for information, expertise and ideas. Tactics may include:

- Legislative briefings
- Economic assessments
- Serving on advisory committees
- Research, analysis and reports
- Polling
- Technical consultants for testimony
- Myth vs. fact sheets

Appendix E: Opposition Tactics¹

Some tactics your opponents may use are:

- *Deflect*: they could divert the issue to a lesser, side issue; or could "pass the buck" to a lower official who has no real power.
- *Delay*: your opponent could make you think they are addressing the issue, when nothing is really being done. For example, forming a "study commission" that has no real power to give you the change you want.
- *Deny*: your opponent may say your claims and your proposed solutions, or both, are invalid.
- *Discount*: your opponent may try to minimize the importance of the problem, question your legitimacy as an agent of change or both.
- *Deceive*: your opponent may deliberately try to make you and your group feel like they are taking meaningful action, when they in fact have not; they may never have had any real intention to consider your issues.
- *Divide*: your opponent may sow the seeds of dissent into your group's ranks, and use a "Divide and Conquer" strategy.
- *Dulcify*: your opponent may try to appease or pacify your group, or people who are undecided about the issue, through offers of jobs, services, and other benefits.
- *Discredit*: your opponent may try to cast doubt on your group's motives and methods.
- *Destroy*: your opponents may try to destabilize or eliminate your group through legal, economic, or scare tactics.
- *Deal*: your opponent may decide to avoid conflict by offering a deal, working with your group towards a mutually acceptable solution.
- *Surrender*: the opposition may agree to your demands. If this is the case, you should remember that the victory is not complete until the opposition follows through with its promises.

¹ Excerpted from Community Toolbox, "Identifying Opponents " <http://ctb.dept.ku.edu/en/table-of-contents/advocacy/advocacy-principles/identify-opponents/main>

