

ORGANIZING AND CAMPAIGN PLANNING TOOLKIT



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"Organizing is a form of leadership that enables a constituency to turn its resources into the power to achieve its goals through recruitment, training, and development of leadership. Organizing is about equipping people (constituency) with the power (story and strategy) to make change (real outcomes)."

- Marshall Ganz, in *"Leadership, Organizing, and Action"*

The Council of Canadians believes that it is people who make history. By working together, we can build power and societies that meet the needs of people and the planet. This common work begins with a commitment to make change, and to inspire other people to make that same commitment. The change we're committed to making is observable and concrete. This change sometimes includes raising awareness and having important conversations, but it doesn't end there. Together with our constituencies, we need to identify our common problems, identify a goal that will help change our collective circumstances, and work towards achieving that goal in concrete terms. This toolkit provides a roadmap to plan each step in this process.

The Council of Canadians works to support grassroots chapters and supporters in their communities. This toolkit is designed to give you resources you can use in your community to build your power. We know that organizing and campaigning can be fluid and unpredictable. Our experiences with the COVID-19 pandemic is a great example of having a wrench thrown into some well-laid plans. The Council of Canadians has historically had both small campaigns with a few people and large campaigns with thousands of people involved. Some are short in length and others go on for years. Some were ultimately successful and others were not, or had some small successes along the way but did not attain the goal. Simply put, this work is about more than outcomes – it is about building a movement, shared community, understanding political power and involving people in the important work for fundamental social change.

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The following adapted tools and activities will help your group through the campaign planning process and support you in developing a strategy to achieve your goal. Sources are included at the bottom of each section. These tools include:

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Times suggested for each section are estimates – your group is encouraged to take the time you need to complete the campaign planning process. These tools can be used in the order that makes the most sense to your group, going through them all in a single session or spread over a few. Feel free to adapt them to your own needs and contexts. If you have any suggestions or feedback on this toolkit, please email us at organizingteam2@canadians.org.





WHAT IS A STRATEGY?

A strategy, in the context of organizing and campaigning for change in your community, is the plan to get you what you want. Marshall Ganz, an organizer, trainer, and lecturer at Harvard, says strategy is “turning resources you have into the power you need to get what you want – your goal.”

This idea deserves a little bit of unpacking. Who is the “you” that is referred to? Is it an individual, small group or much larger group? What do they want? What do they have already? What do they need that they don't already have? And finally, how can they get what they need?

Some of the considerations in a strategy for social change include:

- A scan of your community. What are the problems or conditions in your community that you are interested in changing?
- Who else is working to change these conditions? What institutions, policies, cultures, etc., are maintaining the conditions you're trying to change? What is your relationship to these organizations and institutions?
- A goal. What specific and tangible change are you trying to accomplish? This could be change to a policy, an institution, an event, etc.
- A target. Who holds the power to make the specific change you are after? It's best to name not only an institution or a position within an institution, but also a specific person within that institution. Who is the person who can say “yes” to what you want?

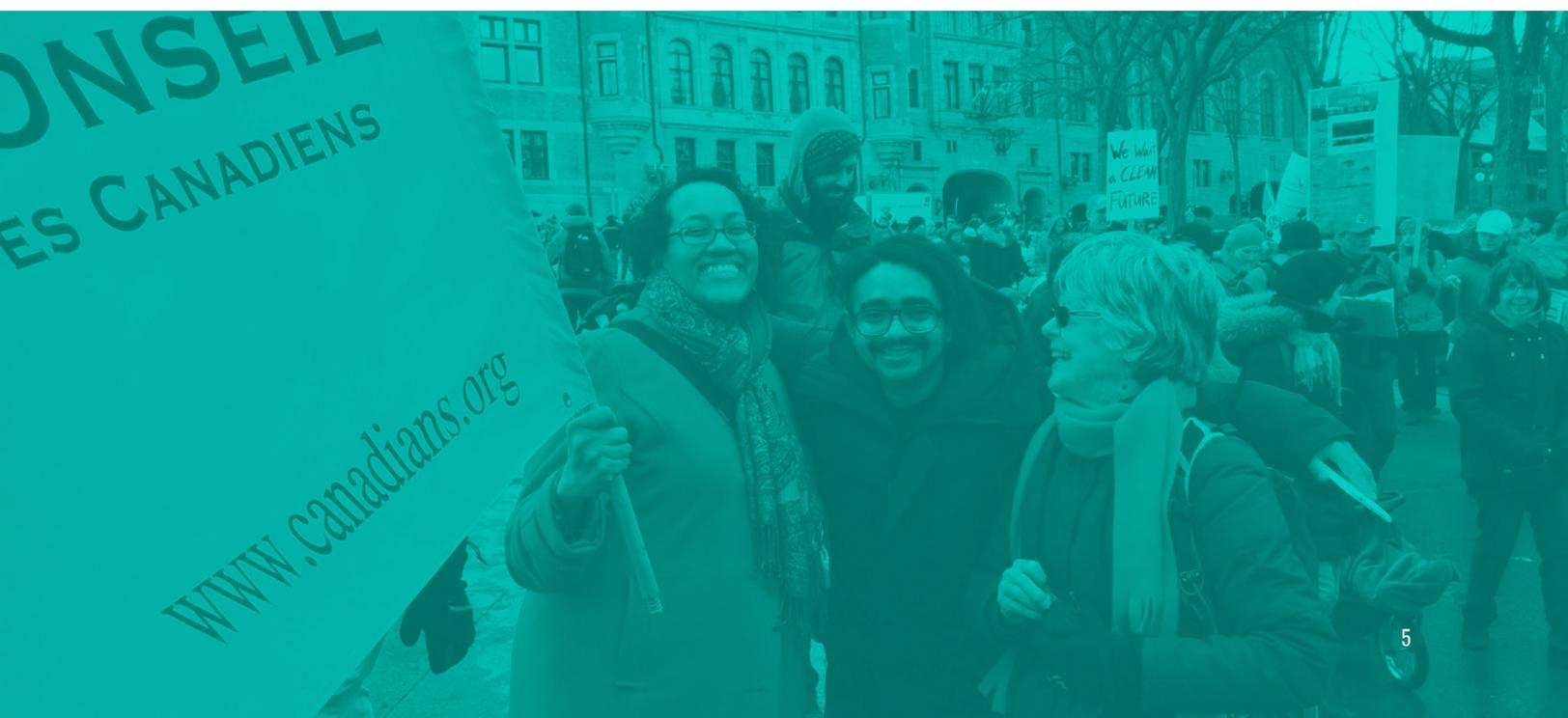
WHAT IS A STRATEGY? (CONT.)

- A power-map. Who else has influence over the target you have identified? How do you relate to those people? Are their goals aligned with yours? How much power or influence do they have?
- Tactics to accomplish your goal. What is the story of your campaign? How does your campaign engage the broader community? What are the timelines on your tactics and how do they build momentum? How do you measure success in your campaign?
- Evaluation. Is your plan working? Are your assumptions about the conditions you are trying to change proving to be correct? Do you need to tweak or change any part of your plan? What is your timeline for evaluation, both throughout and at the end of your campaign?

Developing a strategy for social change is a cyclical process. Once you develop a strategy and start implementing it, you'll likely find that the conditions you are trying to change are indeed changing themselves, and you will need to work this into your strategy.

As trainer Daniel Hunter says, "In playing football, for example, to catch the ball you need to go to where the football is going to be – not where it currently is! Similarly, as activists, we need to design strategies that move to where the trends are – where the football is heading – not just responding to the current headline."

This section was developed using documents and ideas produced by Marshall Ganz and Daniel Hunter. For more information, see the resource list at the end of this document.



TOOL: WHAT IS A STRATEGY? (15 MINUTES)

PURPOSE

Distinguish between tactics, strategy and goals.

To build a better world, we need a roadmap. Goals, tactics and strategy are all key parts of that map. However, it's crucial to be able to distinguish between the three. This activity will take your group through a process to distinguish between the tactics we love to use and the underlying strategy behind them.

Share the following riddle with your group:

Once upon a time a farmer went to a market and purchased a wolf, a goat and a cabbage. On the way home, the farmer came to the bank of a river and rented a boat. However, crossing the river by boat, the farmer could carry only herself and a single one of her purchases: the wolf, the goat or the cabbage.

If left unattended together, the wolf would eat the goat, and the goat would eat the cabbage.

The farmer's challenge was to get herself and her purchases to the far bank of the river, leaving each purchase intact. How can she do it?

Have the group solve the riddle together, and use the following questions to debrief the experience:

- What was the goal of this activity?
- What were the tactics used?
- What was the underlying strategy the group used to achieve the goal?

Summarize the key differences between goal, strategy and tactics. The purpose of the activity was the goal, the strategy was the method devised to achieve the goal, and the tactics were the particular ways that the group implemented the strategy.

Ask participants to share about the different activities they've engaged in with the Council of Canadians. How have they related to goals, strategies, and tactics? Show the group Appendix E (Summary Strategy document) and let them know that you will be filling it out at the end of your process to condense your discussions into something that's easy to reference later.

This section was developed using Training for Change's What Is Strategy resource. For more information, see the resource list at the end of this document.

WORKSHEET: GETTING STARTED - COMMUNITY SCAN (45 MINUTES)

PURPOSE

Familiarize yourself with the bigger picture of what is going on around your campaign and lead a conversation that will hone in on your goals, targets, allies and tactics.

MATERIAL (in-person)

Appendix A (Community Scan), a whiteboard or flipchart paper and markers.

MATERIAL (online)

Computers and collective access to the “Community Scan” slide of this collaborative online template (make sure to save it separately and share the link with your group at the beginning of the process.)

Presumably there is an experience or interest driving your desire to make change in your community. Starting with that personal or organizational point of interest, it can be useful to look around your community to see who else is engaged in that issue. Here we use the word “trend” to describe that point of interest. Perhaps you’re concerned that housing is getting more and more expensive, or that developers in your city are pushing terrible plans through city hall despite clear negative impacts on the community. These would be considered “trends.”

It is helpful to start with this type of scan because you will familiarize yourself with the players and context of your community. It’s likely that your group is not the first to become aware of the problematic conditions you are trying to change, and that other people are working on some aspects of this problem already.

Some questions that can be answered by a scan are:

- Who else is working to change these conditions?
- What institutions, policies, cultures, etc., are maintaining the conditions you’re trying to change?
- What is your relationship to these organizations and institutions?

The purpose of this scan is to get a big picture look at what is going on around you, and to fuel the following conversations that hone in on your goals, targets, allies, and tactics. Not everything you list in this scan will be incorporated into your strategy.

It is helpful to do this in a group. If you’re able to meet in the same place, lay out flipchart paper or set up a whiteboard to make space for each of these questions and a list of answers for each.



WORKSHEET: GETTING STARTED - COMMUNITY SCAN (CONT.)

The layout of the table for the scan can be found in Appendix A. If you’re working from a distance, use a collaborative document tool like our collaborative online template (see “Materials” for this section).”

Here are some questions to guide your community scan. It is helpful to be as specific as possible in answering these questions. For example, instead of saying “the banks” or “city hall” you might say “TD Bank” or “the mayor and these five councillors.” It’s okay if you don’t have all the answers off the top of your head – some research may be required.

- What is the problem or experience that is driving your commitment to make change?
- What are the policies, institutions, interest groups, funding sources, behaviours, etc. that lead to your experience?
- Who else in your community experiences this problem?
- Who in your community is working to make change in relation to that issue?
- Who in your community is working to maintain the status quo, or prevent change in relation to this issue?
- How is your group uniquely positioned to contribute on this issue?

This section was developed by building on experience and collective knowledge at the Council of Canadians.

BRAINSTORM: GOAL-SETTING (30 MINS)

PURPOSE

Identifying the goal or the outcome that your group will be building a campaign around.

MATERIAL

(in-person)

Whiteboard or flip-chart paper and markers.

MATERIAL (online)

Computers and collective access to the “Goal-setting” slide of this collaborative online template.

With any given campaign, a step to take early on is deciding your goals. Even if you are mid-way through the campaign, it can also be useful to press the pause button to reassess.

Sometimes campaign goals might seem obvious. In order to become more intentional about our work, we have devised this tool to help you and your chapter define your goals and objectives.

For clarity, goals are the bigger picture outcomes that your campaign aims to accomplish, whereas objectives are the specific steps you hope to achieve along the way. Goals should be specific, reasonably realistic and engaging. While “ending all forms of racism” or “ending the climate crisis” are crucial, these aims are too broad to be campaign goals. They are better suited to a vision or theory of change.

Ideally, your goal or goals should be single-sentence statements that are easily understood. Simply articulated goals are important because they will keep the group focused on the systemic change you seek and will make development of strategy easier.

Goal-setting can be done by asking yourself/your group a few questions:

- What do we want?
- What constitutes victory?
- How will the campaign win concrete improvement in people’s lives? Give people a sense of their own power? Alter the relations of power?
- What needs to change, and to what extent?
- How is your group uniquely positioned to contribute on this issue?

One way to focus your goal is to use “SMART” criteria. SMART stands for “Specific, Measurable, Achievable, Realistic/Relevant, Time (-bound, -based, or Timely).” Ask your group how your goal fits within these criteria.

BRAINSTORM: GOAL-SETTING (CONT.)

Examples of clear campaign goals include:

- The goal of Disarm Domestic Violence, a world-wide campaign launched in 2009 by the International Action Network on Small Arms, is to ensure that anyone who has had a history of domestic abuse are is denied access to a firearm, or have their gun licence revoked.
- The goal of the Council of Canadians' Blue Communities campaign is to get municipal governments to enact a water commons framework in their legislation that recognizes water as a shared resource for all.
- The goals of the Council of Canadians' offshore drilling campaign are to stop offshore drilling off Nova Scotia and to build organizing capacity in the Atlantic region. A sub-goal of this campaign is to get a moratorium on drilling until a public inquiry is complete.

Short-term goals or smaller wins to achieve broader campaign goals will emerge as you build your strategy and tactics. These sub-goals are important – having wins along the way is important for motivation, engagement and intentionality.

Your goal and sub-goals do not need to be fully formed or perfect as you begin this process. The following exercises are intended to narrow the focus of your goals and show how you can begin working towards and communicating about them.

This section was developed by scanning several websites that talk about goal-setting, like this one, and building on experience and collective knowledge at the Council of Canadians. For more information, see the resource list at the end of this document.



TOOL: POWER-MAPPING (45 MINUTES)

PURPOSE

Map out the stakeholders impacted by your campaign; focus in on your target(s) and what pillars of power (explained in the tool below) support them.

MATERIALS in person)

Appendix B and C (Power-mapping), a whiteboard or flip-chart paper, sticky notes and markers.

MATERIALS (online)
Computers and collective access to the “Power-mapping” slides of this collaborative online template.

With a goal chosen, consider the context in which your group will be working to achieve it. Have group members individually write out everyone they can think of who is engaged in or affected by this issue on individual sticky notes. Be as specific as possible – name individuals or specific organizations.

Using the first power-mapping handout, a larger reproduction of the handout, or the collaborative online template, have the group work to place those written on the sticky notes on the axis. The first group placed on the power map should always be your group.

Once this is complete, ask the group what gaps they notice – who is or should be working on this issue and isn’t represented on this map? Why were some groups decided to have more or less power than others? What constitutes power in this context? As you work through your campaign, the way that power is distributed across these listed groups should change – they should move around on the power map as relationships change. Save this map so you can come back and make adjustments as your context changes. It visualizes how your campaign is changing power dynamics on this issue in your context.

Next, identify two or three individuals on the spectrum who have the power to give you what you want (are instrumental in you attaining your goal). Using the second power-mapping handout, write each person’s name into the centre of one of the inverse triangles.

Inverse triangles cannot stand on their own – each of the identified individuals is supported by people and institutions that give them their power. On the pillars supporting the triangles, identify who gives power to the individual. If it is an elected official, consider how their constituents or the media hold them up and give them legitimacy. If this person is the head of an academic institution, consider who they rely on to give them power – from staff to government grants to student unions. Are any of the other people or institutions on this map pillars who hold up or have influence over your primary target? Be as specific as possible.

TOOL: SPECTRUM OF ALLIES (30 MINUTES)

PURPOSE

To identify where potential allies and opposition folks in your broader community stand in relation to the campaign issue.

MATERIALS (in person)

Appendix D (Spectrum of Allies), a whiteboard or flip-chart paper, sticky notes and markers.

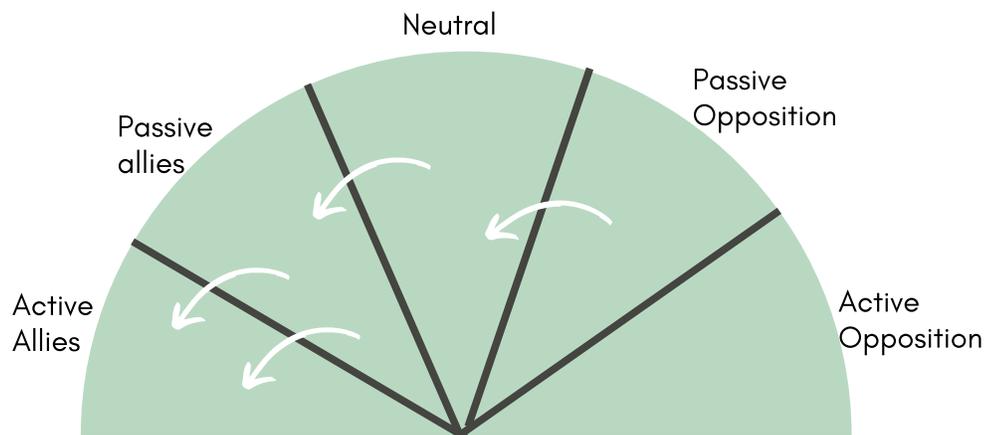
MATERIALS (online)

Computers and collective access to the “Spectrum of Allies” slide of this collaborative online template.

In order to organize our communities for real change we must first understand who “our community,” or constituency, is. It is sometimes simpler to identify an issue that needs solving, but to truly solve the problem and keep it solved, we must work with our constituency with the resources we have and the goals we set together to make change.

The group may be asking themselves how it is possible to influence the decision makers that you identified with the inverse triangle activity. Show the Spectrum of Allies Appendix or slide – note the tension between those who are acting for change and those who don’t. Those who want change, our allies, are on the far left of the diagram – our opponents, who are opposed to the change we would like to see, are on the far right side of the diagram.

Take the list of people and organizations that your group brainstormed during the power-mapping exercise. Place each person or organization into the appropriate wedge in the spectrum.



TOOL: SPECTRUM OF ALLIES (CONT.)

Note that your campaign doesn't have to move everyone to our side. It is often enough to shift each wedge one turn towards our side. Sometimes your actions will polarize the issue and move some wedges or groups towards your opposition. However, you can still achieve your goals if the majority of people move in your direction.

As activists, we often think that we need to have everyone onside to push for change, or that the only people we can target are power holders. This is a recipe for despair. There are a wide variety of strategies and tactics that your group can employ to strategically shift public opinion and put pressure on those who can ultimately make the decisions that affect your goal as a group.

However, it is important to actually reach out to various groups you are mapping in order to make a good evaluation of where they land in the spectrum. Some very powerful coalitions have been built by organizing with unusual suspects—like the Cowboy and Indian Alliance in the U.S., for example. Sometimes we can think that a group would be an ally or an opponent, but doing a bit of outreach to verify this is important. Make sure to assign this outreach to group members who will reach out during or after the strategic planning exercise.

This section was developed using 350.org's Spectrum of Allies resource. For more information, see the resource list at the end of this document.



TOOL: PAPER PLATE STRATEGIC CAMPAIGN PLANNING EXERCISE (1 HOUR)

PURPOSE

To help plan the tactics your group will use to influence decision makers and achieve your goal.

MATERIALS (in person)

Paper plates (3-4 per person, plus extras), markers and lots of floorspace.

MATERIALS (online)

Computers and collective access to the “Paper Plates Strategic Activity” slide of this collaborative online template.

As the group moves from power-mapping and the spectrum of allies into developing tactics and strategy, provide a quick overview of the work that you have done so far, noting especially that there is more than one way to push for change. The group has an idea of the decision makers they need to shift, and who influences them. Collectively, the group also has an idea of who your natural allies are in this goal, and the individuals and organizations you need to shift to attain your goal.

Write your goal on a plate and drop it to the far right of your floorspace. If you are planning digitally, write your goal on the slide.

Next, hand out 3-4 paper plates to each person, and have each group member write down one tactic or action per plate that they can see moving your work forward towards the goal. Encourage people to be creative and dream big – there is no action too small or silly! After a few minutes, have everyone share their ideas by putting down the plates in the middle of the floor.

These ideas will sometimes overlap. You can stack plates that have the same idea. Once plates are placed on the floor, begin to order the tactics towards the goal. Think through what is necessary for each tactic to happen. Add in extra plates if there is other work that needs to be done before a specific action (for example, if you want to have a rally with labour leaders in your community, write “build relationships with labour leaders” on a plate and place it in front of your “rally with labour leaders” plate.)

Questions to help motivate thinking through how these tactics relate and contribute to your work:

- How do these tactics build off each other and create momentum?
- Who do we have to engage in the campaign in order for these tactics to happen?

TOOL: PAPER PLATE STRATEGIC CAMPAIGN PLANNING EXERCISE (CONT.)

- How do these tactics engage other members of the community?
- How are these tactics accessible to the community? (people with disabilities, elderly people, young families). Read tips on how to make your work more accessible.

Following this discussion and the prioritization of your tactics, talk through the strategy of attaining your goal as it is shaped by the tactics discussed. Questions to prompt discussion and deeper thinking about the overall strategy include:

- Does your group tend to stick to the same actions?
- How can you be more creative and bold?
- What is the story of your campaign?
- How does your action fit within that larger, coherent story?
- How will you ensure that your story is simple, clear and easily communicated?
- What is the timeline for your goal?
- Does it feel realistic considering the capacity of the group and the political reality of your community?
- How does your campaign further engage those who participate in it?
- Are there tangible ways to measure success in your campaign?
- When will your group debrief and evaluate?

As this conversation comes to a close, note that you can only attain your goal by ensuring the strategy and tactics are taken up by your group. Go through the paper plates and tactics one final time and assign people to each plate by writing their names on the rim. Several people can be assigned to each tactic – make it clear that whoever’s name is written on a plate takes responsibility for the tasks and thinking through what is necessary around that piece. If you are online, write up a list of action items and assign them to individuals or groups.

Take a picture of the timeline and assign someone to type the timeline up and share it with the group. Hand out the plates or share the action items with the responsible group members and set a follow-up time with the group to go over the most immediate pieces of your strategy, and to revisit your goal.

This section was developed using 350.org’s Paper Plate Campaign Planning resource. For more information, see the resource list at the end of this document.



CAMPAIGN EVALUATION (5 MINUTES DURING THIS SESSION 1HR+ IN THE FUTURE)

PURPOSE

Collective evaluation of the strategy opens up the space for reflection on what worked and what didn't, and allows your group to share and capture lessons learned.

In order to have an effective tool for evaluation, some indicators and measures for outcomes need to be included in the development of your strategy. Evaluation needs to be relevant to the context, and can happen either when it's necessary (after a major action or shift) and/or on a regular schedule (seasonal or every 6 months, for example). Research indicates that this is more useful than a one-time, end-of-campaign evaluation.

Here are some sample questions you can use to evaluate, but we invite your group to create more context-specific evaluation questions as well:

CAMPAIGN EVALUATION QUESTIONS

Shorter term evaluation:

- Are we doing what we planned to do?
- Why or why not?
- Which allies could we engage more?
- Has anything shifted in terms of the political context within which we're working?
- How does this impact our goals and strategy overall?
- Are there other strategies we should consider, moving forward?

Seasonal / longer-term evaluation:

- Are we having a political impact?
- Are we building a base?
- How are we building power in our base?
- Looking at your power-map, how have relationships of power shifted?
- Are we being intentional about both 'offensive' and 'defensive' organizing strategies?
- Did you get the supports you needed?
- Have you made space for allies or coalition members to give their perspective on the campaign?

This section was developed by building on experience and collective knowledge at the Council of Canadians.



CAMPAIGN PLANNING PROCESS DEBRIEF (30 MINS)

PURPOSE

Reflect on the work you've done and connect with your group before beginning campaign work.

MATERIALS (in person)

Appendix E (Summary Strategy), a whiteboard or flip-chart paper, sticky notes and markers.

MATERIALS (online)

Computers and collective access to the "Summary Strategy" slide of this collaborative online template.

First, fill out Appendix E (Summary Strategy) as a group to condense your discussions into a document that is easy to reference later on. You can also assign this to a group member to fill out following the campaign planning process to share with the group.

Then, take the time to check in with the group before everyone leaves to begin working on their parts of the strategy.

Some suggested debrief questions include:

- What were the highlights and lowlights of this process for you?
- What support will you need leaving this space?
- How are you feeling about the session?
- What could have made this experience better for you?



RESOURCES USED TO DEVELOP THIS TOOLKIT

<http://communitylearningpartnership.org/wp-content/uploads/2017/01/Ganz-Marrakesh-training-guide-.pdf>

https://www.trainingforchange.org/training_tools/strategy-in-an-hour/

<https://www.thechangeagency.org/campaigners-toolkit/trainingresources/strategy/>

<https://beautifulrising.org/tool/power-mapping>

<https://trainings.350.org/resource/how-to-create-a-campaign-plan-the-paper-plate-challenge/>

<https://trainings.350.org/resource/spectrum-of-allies/>

<http://communitylearningpartnership.org/wp-content/uploads/2017/01/Ganz-Marrakesh-training-guide-.pdf>

<https://www.bhopal.net/take-action/skills-resources-toolbox/how-to-plan-your-campaign/#plan-1>

https://www.lapiana.org/Portals/0/Documents/Nonprofit_Strategy_Revolution_Tools.pdf

Organizing for Social Change, Midwest Academy manual for activists (Fourth edition, 2010) (midwestacademy.com)

Glossary

Appendix A: Activist Training Slidedeck - “Community Scan”

Appendix B: Activist Training Slidedeck - “Power-mapping”

Appendix C: Activist Training Slidedeck - “Power-mapping”

Appendix D: Activist Training Slidedeck - “Spectrum of allies”

Appendix E: Activist Training Slidedeck “Summary Strategy”

Appendix F: Accessible Community Organizing.

Appendix G: How to Debrief

Appendix H: Evaluation Tool.



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