Developing a Winning Strategy

HOW ARE WE GOING TO WIN?

After spending two months doing research to develop a campaign for transitional jobs for people leaving welfare, Community Voices Heard (CVH) members meet to reflect on what they have learned and to consider the strategy they can use to win the campaign. The meeting includes fifteen people from the research team and the CVH leadership, as well as the organizer, Martha.

Betsy, a leader who has been meeting with allies and other stakeholders, reports that key community and policy organizations are in favor of the CVH Transitional Jobs Bill. She writes their names on a flip-chart and circles the half dozen or so that say they would support the campaign. They are mostly small organizations without a lot of power.

She lists the unions and says they have been reluctant to support the bill. They may even oppose it. They fear the jobs program will solidify a second-tier workforce in city government and cut wages for union workers. “We have to work to get them involved, because without the unions—it will be hard to win this program,” Betsy concludes.

Members start talking about what strategies they could use to move the target of the campaign, the city council speaker. Gail hands out a sheet that describes what the research team has learned in its target research. The speaker represents a working-class district in Queens. He does not have a record of championing progressive legislation or focusing on poverty. He is, however, planning to run for mayor, so he may be more open to supporting a jobs program in the coming year.
He is also seeking the support of the city’s largest union—which is affected by WEP. “Many of the groups we talked to says he shuts down in confrontational settings,” Gail continues. “He won’t work with groups that he sees as attacking him, and when he gets mad at a group he stays that way. He will kill any legislation the group proposes in the council.”

Members consider their capacity to use various strategies. They are clear that a disruption strategy will not work with the speaker, but they do think that with a direct action strategy of worker actions, culminating with a mass rally at city hall, they can convince the speaker to support the jobs program. Karen, a WEP worker leader, says, “We can do this on our own, we don’t need the unions. There are forty thousand WEP workers. Let’s show everyone how powerful WEP workers are.” Others agree. “It shouldn’t be hard,” a new leader says, “I have thirty women at my site, and they are all angry. I’m sure I can get them to go.”

As they move toward deciding on a strategy, Martha, the organizer, asks people to evaluate the last five CVH actions. She writes the names on a flip chart, as members yell out: Albany Lobby Day! Ground Hog Day! Labor Day Action! City Hall Picket! WEP Worker March! She asks how many people came out for each of these actions. As she writes the numbers on the chart, the mood in the room slowly changes. Twenty-five people, forty-three, sixty-five, ten, and finally the largest action—250 for the Albany Lobby Day, which CVH did jointly with another organization. “How can we move the second most powerful person in New York City,” she asks, “when we have an average of forty people at an action—and two organizers?” The members look at each other. Betsy stands up and turns back to the flip chart page where she wrote the list of organizations and unions. “We need more groups involved if we are going to win, especially the unions,” she says. Everyone reluctantly agrees.

What Is Campaign Strategy and Why Is It Important?

Campaign strategy is the way or ways that a community power-building organization uses its power to win a demand. An effective strategy provides the framework and method for the campaign.

You figure out the best way that is within your capacity to move the target to give you what you want. This strategy determines the actions and tactics you use in the campaign. You start by asking, “Will a disruption strategy move this target?” and “Do we have the capacity and ability to use disruption?” You do not start by saying, “Let’s take over offices.”
If the organization just plunges into action with no clear strategy, it goes from event to event with no deep payoff. Targets are strategic. They don’t become powerful by doing things without really thinking them through. Organizations need to be strategic to create change. Exercise 9.1 helps people understand what strategy is.

**Is Our Constant Base-Building a Strategy?**

*Yes! Base-building is the core strategy of community power-building organizations.*

Through base-building, you bring more people into the political life of a community. You build the power of the community so it can do more than engage in defensive campaigns. It can set the agenda. Sometimes organizations do use strategies without base-building and achieve short-term wins. For example, a media campaign defeats a bill to lift regulations on toxic materials. But corporations are likely to lobby for that bill again. Although you might see some immediate results without base-building, only when those families and individuals who want a clean, toxic-free community have power will corporations stop advancing the pro-toxic law.

**What Are the Various Strategies We Can Use?**

*There are seven main strategies: direct action, disruption, legislative, advocacy, alliance-building, media and public education, and legal strategies.*

Tool 9.1 summarizes the following material in a handout, and Tool 9.2 provides a checklist to help evaluate if you have what it takes to implement a particular strategy.

*Direct action.* In a direct action strategy you engage a target in controlled confrontation. You are in direct negotiation with the target. You mobilize constituents and members of your organization in well-organized, nonviolent events where they directly make a request of a target. This strategy is a show of power. It also builds your power by engaging new people. To use this strategy the organization needs to have a good understanding of when and how to mobilize its base.

Direct actions include accountability sessions, which are mass meetings in which constituents publicly ask yes or no questions of a person with power, the answers to which they can later hold her or him accountable. Direct action also includes target meetings. In a target meeting, a small group of people who represent the larger organization get a meeting with the target because the organization has demonstrated its power. For example, the target agrees to meet with five people in his office because of the five hundred people chanting in his lobby. In
these meetings, leaders elicit statements from the target that the organization can hold him accountable to.

Controlled confrontation through direct action requires that an organization has enough juice to turn out a mass number of people, get the target into a room with you, and control the agenda and the target. That control requires advanced constituent leadership and a large team of leaders who can each play a specific role.

Disruption. In a disruption strategy you interrupt the target’s day-to-day schedule or interfere with the normal operations of an agency, business, or the state. Actions include sending a group of members to a corporate or government office or establishing a daily picket. This strategy does not require mass numbers of people. Depending on the specific action you choose, you can be effective with ten people or one thousand.

You use this strategy when the target or secondary targets will not acknowledge your presence or when the leadership team decides disruption is the best way to achieve a clear objective, such as getting press coverage or raising the issue in the public eye. A disruption strategy can help to move a target who is concerned about maintaining order.

Disruption is strategic, not chaotic. It is carefully orchestrated and nonviolent. To do effective disruption an organization needs a core group of leaders and a broader membership base who are willing to confront and challenge the power of the state, police, or security officers, and at least some of whom have some experience doing so. It also needs a well-informed, trained, and disciplined membership and a strong tactical team of leaders who can make quick decisions and negotiate with authority figures.

Legislative. In a legislative strategy your organization works with legislative and executive branch leaders to change public policy. This strategy is distinguished by the fact that it usually includes writing a bill as well as passing it. It also includes making sure the bill gets funded and implemented. Each of these elements is essential for making a real policy change.

Constituents meet with legal advisors or other allies to create legislation. Then they meet with legislators or members of a local governing body in their offices to directly ask them to support a bill or program. A legislative strategy usually includes lobby days. These are day-long actions where members descend on a state or city capital and meet with many legislators. You usually hold a march or rally along with a lobby day to get press coverage on the issue and energize participants.
When community power-building organizations use a legislative strategy, they train members to participate in a process that professional experts from advocacy and citizen organizations usually dominate, such as running the lobbying meetings and speaking to the legislators.

The timing of the legislative session can limit when you can use legislative strategies. For example, in New York State the legislature is only in session from January to late Spring. Therefore, a campaign that includes getting sponsors for a bill, passing it through the legislature, and getting it signed by the governor has to take place in this period of time.

You choose a legislative strategy when legislative action or a new law will remedy the problem. You usually prioritize one or two key legislators to work with, such as a committee chair or other powerful legislator, and do basic support work with other legislators. Legislative strategies require the following:

- The ability to move people in decisive legislative districts to move their own legislator
- Enough people in enough districts to get a critical mass of support for the legislation
- The ability to move the legislative leaders, such as committee chairs, who must play a role
- A staff person or leader who can dedicate the time needed to follow up with legislative staff on the status of the legislation and related matters
- Leaders with the skills to negotiate and compromise over policy issues
- Knowledge of the process for city, state, and federal budget development and bill making
- The ability to write legislation or relationships with groups who could help do so
- Time to work the resolution of the issue through the slow process of legislation

Advocacy. In an advocacy strategy your organization improves public or private systems and administrative procedures that affect the issue. You may also get elected officials to create new public programs. This strategy assumes that a target wants systems to work and wants communities to get what they need, she just needs to know there is a problem and a solution to it.
With this strategy you engage in activities such as serving on advisory commissions or surveying the people who use a social service program. You initiate research projects that examine programs, the impact of policies, or other social and economic indicators that may help to convince targets to do the right thing.

Groups that successfully use advocacy strategies usually have some significant wins that give them access to decision makers. They have passed legislation, created programs, or built enough power through direct action or disruption strategies that targets directly respond to them, bringing them, to some extent, inside the decision-making process.

You do not need a lot of people to use an advocacy strategy, but you do need a developed membership base that is experiencing the problem first-hand. You also need a strong leadership team that understands complex issues. The team communicates with bureaucrats who can make something happen and who want and need the organization’s on-the-ground information.

Organizations choose an advocacy strategy when a change in systems or procedures will resolve the issue. Advocacy strategies require the following:

- Access to targets, policymakers, and decision makers
- Knowledge about what is happening in the field or in the community that shows your credibility as community representatives
- The capacity to do effective research and to develop easily understandable policy recommendations—either internally or with outside assistance—that deal with an issue
- A target who responds to rational and good-government arguments as opposed to ideology
- A base of organizational power that will make the target listen to your ideas

**Alliance-building.** In an alliance-building strategy, the issue requires more power than your organization currently has, so you get enough power by forming partnerships with others, including labor, community groups, citizen organizations, and religious-based networks. You use this strategy to combine organizational strengths. You move a target to deliver on a set of goals, objectives, and demands that all the groups agree on. You may run a coordinated campaign, create a formal partnership for the long or short term, or develop a joint project.
An alliance-building strategy is not a sign-on coalition. Although you may participate in coalitions that exist to address a finite set of problems, such as hunger, jobs, or housing, you form strategic alliances to change power structures. You establish a strategic set of relationships and set them in motion to take advantage of the power of each partner in specific ways that move a target to respond to a demand.

Alliance-building strategies take time to develop. You need to have the power to move influential organizations to work with you. Developing this power can take on the elements of a campaign as you learn their self-interest and target the pressure points that will move them to work on your issue.

As you work together, you build trust, honesty, and clarity about the self-interest and needs of each organization. These alliances are not quick-fix solutions to immediate problems. They are strategic remedies to complex problems. (For more about alliance-building, see Chapter Fourteen.)

Alliance-building strategies require the following:

- The ability to compromise and negotiate with other groups working on the issue
- Especially for smaller, grassroots groups working with larger organizations, the ability to bring some power to the table and to be able to use that power when needed
- The ability to find other groups that have power, want to work on your issue, and will make it a real priority for their organization
- The organizational capacity, including staff time, to engage in both the base-building needed to remain powerful as well as the alliance-building needed to have an effective partnership
- The membership support to move slowly on an issue and to devote time to sharing control with other institutions
- Members and leaders who can regularly participate in alliance-building activities

Media and public education. With a media and public education strategy, your organization develops a comprehensive and detailed plan to use public opinion and the media to move a target. You also use this strategy to raise an issue in the public consciousness.
The goal is not to get media coverage. The goal is to move the target. You establish measurable objectives to achieve your goal, such as getting three editorial boards to support your organization’s demand. You move reporters and people with influence to write articles, editorials, columns, and special features in support of your issue, or you get them to use their platforms to challenge the target to address the issue. You not only get coverage of your own actions, you also initiate a public dialogue about the issue. Once the target has to respond to both the community and your organization, you use additional strategies to engage in direct negotiation with him.

An effective media and public education strategy requires a comprehensive media plan with clear goals and objectives, including target audiences and a clear message; organizational capacity and commitment to deal with the multifaceted components of implementing a media plan; and leaders and members who can deliver a message about complicated issues in understandable sound bites to both reporters and live audiences.

Legal. In a legal strategy, your organization uses the legal system, the courts, and judicial law to put additional pressure on your target to respond to your demands. This strategy can force the target to respond to an issue she does not want to address. It can move a target to negotiate to avoid a lawsuit. It can also attract press attention to your issue. Members and leaders develop new skills through serving as plaintiffs or by learning about the legal system.

With legal strategies, it is especially important to keep in mind that they support but do not replace the main power-building strategies. Winning a legal battle is not the goal, it is a tool to help achieve the campaign goal.

Effective legal strategies require an in-house legal team or a partner organization that has an expertise in legal matters, a leadership and board that is willing to integrate a legal strategy into the organization, and the ability to respond to the particular requirements of a legal strategy that may affect other aspects of the organization’s work, such as city contracts or conflict-of-interest laws.

**How Do We Determine What Strategy to Use?**

You choose strategies based on two fundamental assessments: will it achieve the goal of moving your target, and does your organization have the capacity and ability to use the strategy effectively.
Members and leaders in a community power-building organization develop strategies collectively in partnership with staff. They assess what strategy to choose by answering the following sets of specific questions. Tool 9.3 presents these questions in a handout. Exercise 9.2 is a quick way to help staff or leaders review the basic considerations for determining what strategy will move a target, and Exercise 9.3 provides a more in-depth strategy exercise.

What strategy will achieve the goal?
- What is the target’s position and what does he respond to?
- Does the target support or oppose our demands?
- What tactics does he respond to and what does he not respond to? (For more information on tactics, see Chapter Twelve.)
- Who does he listen to and care about?
- What are some recent examples of what moves the target successfully?

What strategy can our organization implement?
- How much power does our organization have?
- Do we have enough members to get a response from the target?
- Which leaders want to work on this strategy and are they willing to put in time?
- Can we mobilize our members?
- Will the target meet with our organization?
- Does the target feel that he needs to deliver to our members?
- Does our organization have the ability to disrupt the day-to-day business of the target or people connected closely to the target?

What power does our organization need to add?
- What other groups are with us?
- Who will oppose our demands or get involved in the issue once we start to move on it?
- Do we have the power not only to move a target but also to deal with people who oppose us or throw us off track?
What is our organizational capacity?

- Which staff members can we commit to this campaign?
- Do we have organizational experience (staff, board, or leader) to help us develop and implement a successful campaign?
- How much money do we need to conduct this campaign effectively?
- How much money do we have that we can commit to this campaign?
- How can we raise money for this campaign?
- How will this campaign bring in new members and develop our leadership base?
- What other resources or support will we need to put into this campaign?

**What Is the Relationship Between Campaign Research and Strategy Assessment?**

*What you learn in your research, as described in the previous chapter, helps you assess which strategies have the potential to work.*

As a result of your landscape research, your strategy deals with the possibility of changes in the campaign and the potential way it could develop.

As a result of your target analysis research, your strategy reflects the target’s pressure points and what will effectively move him.

As a result of your power analysis, your strategy reflects your actual power—not imagined or wishful power—as well as identifying other stakeholders who will participate during the campaign, either for or against you.

As a result of your organizational assessment, your strategy is based on your strengths and what your organization can actually do.

**Can We Use More Than One Strategy in a Campaign?**

*Organizations often use a combination of strategies, but keep in mind that the more strategies you use, the more capacity you need, and strategies need to build off of one another.*

Your capacity includes the time and energy of members, leaders, and staff. For example, to maintain a ban on toxics, you can effectively build an alliance, which is one strategy, while using the relationships you have with the media, which is a
second strategy, but only if you have enough people available to attend meetings, participate in conference calls, and maintain good communication with both allies and reporters.

Keep in mind that multiple strategies always connect and build off of one another. For example, when CVH successfully got Mayor Bloomberg to create the position of Deputy Mayor for Health and Human Services as we describe in Chapters Eight and Ten, he also created a commission to study poverty in the city. The deputy mayor invited CVH to participate in conversations about what the commission should do to address poverty. Using an advocacy strategy, CVH submitted its proposals, then used a media strategy to keep pressure on the deputy mayor to implement its suggestions. CVH increased its power because many of the city’s media outlets covered its perspective on the work of the commission and what it should do about poverty. The media strategy also served to strengthen the “insider” advocacy strategy. A different strategy, for example a disruption strategy, would probably have weakened the advocacy strategy.

How Do We Choose a Strategy?

Strategy development is not complicated, but it does require that you look at information, think deeply about it, and decide how to act.

In a community power-building organization, developing strategy is a collective process. Staff and members meet in a campaign strategy session, which gathers the best thinking of everyone who will move the campaign forward and trains people to develop the ability to think, reflect, and act strategically.

Participants in the campaign strategy session include core leaders, board or steering committee members, staff, and working members from the organizing committee and research team. A campaign strategy session is a good way to involve new people who are affected by the issue, as long as they understand the mission and focus of the organization. A trusted ally can also serve as a resource during this meeting.

How Do We Prepare a Campaign Strategy Session?

In order to have a successful session, you thoroughly compile and communicate the research findings and prep the leaders who will facilitate the meeting.
The following are the steps you should take to prepare for a campaign strategy session:

*Finalize campaign research findings.* Prepare clear, easily digested handouts and large charts with the campaign research findings. You have already organized this information to conduct a power analysis, as we describe in Chapter Eight. One of the charts or handouts for this campaign strategy session is the power analysis grid of potential allies and opponents.

*Develop potential strategy scenarios.* Prior to the meeting, a small group of core leaders and staff works out a few strategy scenarios for discussion so that the larger group can focus on the “what ifs” and on getting collective buy-in. The small group spends several hours going through the strategy assessment and suggesting different approaches. They look at what they would need in order to take on each strategy and decide if they have it. (See Tool 9.2, Campaign Strategies Checklist.) They show what they think is likely to happen based on taking one route or the other. Sometimes they make a recommendation as to what they think the strategy should be, but their primary job is to lay the groundwork for a good membership discussion and an informed decision. They write up these scenarios so that people can read them before and during the meeting. They prepare to answer questions about the scenarios and about strategies members may suggest that the core leaders do not believe will work at all.

Thinking through strategy approaches is a great opportunity for leadership development. Working out the scenarios challenges experienced people to look at all the angles, talk about their ideas in a small group, and prepare to make a case and be accountable to a larger group of people.

*Conduct leadership prep.* Staff members prepare two or three of the core leaders to facilitate the session. At least one person is assigned to making sure everyone participates in the strategy session. The facilitators prepare to present and discuss the research findings, the scenarios, the basic concepts of strategy, and all the materials being distributed at the meeting.

*Develop and distribute written materials.* To summarize, you prepare the following written materials and send them to members in advance of the session: agenda with goals, campaign research findings, power analysis grid, list of all available strategies, and strategy scenarios for this campaign.

*Prep members who will be attending the meeting.* Staff call members before the meeting and discuss the campaign and the goals for the strategy session. They
briefly review the potential strategies and go over the written materials for the meeting. Tool 9.4 offers a sample agenda for a strategy session.

**What If Our Organization Can’t Implement the Type of Strategy We Need to Win?**

_Don’t undertake a strategy you cannot implement._

Taking on a strategy when you do not have the organizational capacity or the power to implement it can diminish your ability win the campaign. Instead, play to your strengths.

For example, in the CVH jobs campaign, members realized that a disruption strategy featuring a WEP worker strike—forty thousand WEP workers not going to work—would be a significant show of power and would win the campaign. But the organization knew it did not have the staff or money to make such a strike happen.

Instead CVH knew it could build a small leadership team of WEP workers. It could turn out approximately thirty to fifty WEP workers regularly and up to 150 at strategic times. This number was enough to move unions, including a large municipal union that could shape public policy, to support the campaign. CVH also had on-the-ground information about how the WEP program was truly functioning and it had WEP workers who could effectively communicate this information to the press and the public. The campaign strategy therefore included media and public education, alliance-building, and direct action strategies. Rather than trying to organize a weak strike, the organization built its strategy around its strengths and ultimately won the campaign.

You can take on new strategies or a strategy that you may not currently have the capacity to pull off if you have a concrete plan of how to successfully build the capacity to do so.

**LEADERSHIP DEVELOPMENT OPPORTUNITIES DURING STRATEGY DEVELOPMENT**

*Each strategy offers different opportunities for leaders to develop:*

- **Direct action:** Recruit and mobilize; run large-scale actions
- **Disruption:** Make decisions on a tactical team; run actions
• Legislative: Facilitate meetings; schedule and hold district legislative meetings and meetings on lobby days
• Alliance-building: Represent the organization at ally meetings; participate in meetings with allies; develop and maintain organizational relationships
• Media and public education: Develop and manage a media plan; be a press spokesperson; organize and attend editorial board meetings
• Advocacy: Develop a research project with staff; help to develop a survey; survey members; conduct research on policies
• Legal: Work with legal staff on developing case; serve as plaintiff on the case; negotiate in out-of-court settlements

CHALLENGES IN STRATEGY DEVELOPMENT

“Our members just want to get everyone they know to write e-mails and letters to the target.” Writing to the target is an example of one kind of action you could do, but in itself it is not a strategy. The desire of members to move directly to action or to discussing tactics is a common challenge that they learn from experience is not effective. In Chapter Twelve, we talk more about the importance of connecting actions to strategies in the context of campaigns.

It is the job of experienced leaders and organizers to continually help people to distinguish between actions and strategies, between what really builds their power and what does not, and not to let these kinds of distractions derail a group from effective strategic thinking.

“Since we’re an organizing group, our leaders think we should always use disruption first.” As with any strategy choice, you only use disruption if your research shows it’s the way to move the target, you need to use it, and your organization can do it in a disciplined, nonviolent way.

“Members want the organizer just to go meet with the target.” If the organizer meets alone with the target, he or she may get a short-term result, but this action does not build community power. Members may decide that an organizer should meet with a target as part of an advocacy strategy, but they should make every effort to send a leader to this meeting as well. If a staff person participates in a meeting with a target, the goal is to have an impact on a policy or administrative function, not to build the influence of an individual staff member.
“Our strategy is not working.” Sometimes you start to work on the campaign and find out that the strategy does not work. You may have overestimated your power or the willingness of other groups to work with you, or you did not do adequate target research. Choosing the wrong strategy does not mean that you will lose the campaign. If the strategy is not working, you evaluate why, then decide if you will start again.

**ESSENTIAL ELEMENTS FOR DEVELOPING A WINNING STRATEGY**

- **Show your power.** You include mobilizations of members in all of the strategies to ensure that throughout the campaign allies, stakeholders, and targets know that you have power.
- **Have all strategies connect to your base-building.** For example, if you are using a media strategy, you develop new members to be spokespeople and include new members on the committee managing the media strategy.
- **Use the strategies you need to win.** Organizations often use a combination of strategies, but keep in mind that the more strategies you use, the more capacity you need, and if you use multiple strategies, they need to connect with one another.
- **Develop strategy based on a realistic assessment of your own power.** You must engage in an honest evaluation of your own power and capacity. Overly ambitious thinking is not useful in strategy development.
### Tool 9.1
### The Strategies

You can use the following as a handout for staff or leadership training to help people to understand strategy development. For more about actions, see Chapter Twelve.

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Goal</th>
<th>Target Responds to . . .</th>
<th>Organizational Capacity Needed</th>
<th>Main Organizing Work</th>
<th>Sample Actions</th>
<th>Training Needs for Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct action</td>
<td>Build enough organizational power to make a target do what you want.</td>
<td>Raw people power in a room.</td>
<td>Ability to turn out large numbers and get target in a room.</td>
<td>Membership recruitment and large-scale mobilization to show power.</td>
<td>Accountability session. Day in the life. Target meeting.</td>
<td>Recruitment. Membership turnout. Mobilization. Running large actions.</td>
</tr>
<tr>
<td>Disruption</td>
<td>Disrupt the operations of state power and civil society to get targets to meet with you and ode to your demands.</td>
<td>Nuisance tactics that make his or her life or community uncomfortable.</td>
<td>Ability to coordinate and manage confrontational actions.</td>
<td>Ongoing disruptive actions that apply nuisance tactics.</td>
<td>Office takeovers. Street closures. Pickets. Boycotts.</td>
<td>Recruitment and mobilization. Action training. Political education. Media and street action.</td>
</tr>
<tr>
<td>Legislative</td>
<td>Do enough effective work to move enough legislators and elected officials—including their staff—to support a policy or legislative demand.</td>
<td>Lobbying techniques that engage constituents, rational policy, and good government arguments.</td>
<td>Membership base in important districts and the ability to mobilize them in their districts. Ability to generate mass letters, phone calls, and legislative visits.</td>
<td>Organizing legislative meetings with members.</td>
<td>Lobby days. Legislative meetings. Briefings. Work in districts.</td>
<td>How to run house meetings. How to lobby. How to speak to power. Petitioning and letter writing. How government works.</td>
</tr>
<tr>
<td>Advocacy</td>
<td>To develop “good government” and good policy arguments to move your targets.</td>
<td>Good public policy and rational decision-making.</td>
<td>Ability to conduct effective policy research and program evaluation either internally or in partnership with another organization.</td>
<td>Research, surveying constituency and developing effective policy reports and arguments.</td>
<td>Briefings for elected officials, policy officials, allies, and media.</td>
<td>How to conduct surveys and do other research.</td>
</tr>
<tr>
<td>-------------------</td>
<td>--------------------------------------------------------------------------------</td>
<td>--------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Alliance-building</td>
<td>Work to build an alliance of organizations that will have enough power to move a target.</td>
<td>The organizations working together and the united power they represent.</td>
<td>The ability to move other stakeholders with power to participate in a deep way on your issues. The resources for staff to coordinate the alliance.</td>
<td>Identifying stakeholders. Relationship-building with allies. Moving allies. Staffing alliance activities.</td>
<td>Actions such as lobby days, marches, or press conferences where all groups participate.</td>
<td>How to facilitate meetings. Power analysis. Negotiating with allies. How unions, religious institutions, and allies operate.</td>
</tr>
<tr>
<td>Media and public education</td>
<td>Get media to cover your issues and your position in a way that will move the target. Educate the general public to support your position</td>
<td>Unfavorable press on his or her unwillingness to act on a demand or to act negatively. Positive press on your demand.</td>
<td>Ability to develop and implement a comprehensive media plan. Leaders who are trained to speak. An issue that has the capacity to attract press attention.</td>
<td>Getting press stories, editorial board meetings, prepping members, and creating actions that attract press coverage.</td>
<td>Media briefings. Editorial board meetings. Creative actions. Letters to the editor, op-ed pieces, and press conferences.</td>
<td>Media training—messaging, op-ed writing, press releases, and similar basics. Public speaking training.</td>
</tr>
<tr>
<td>Legal</td>
<td>To force the target to respond or negotiate.</td>
<td>Unfavorable press or potential legal hassles.</td>
<td>In-house legal skills or partners, ability to lose a related funding stream.</td>
<td>Working with legally trained allies, getting press for a lawsuit, finding plaintiffs.</td>
<td>Press conference with plaintiffs. Serving papers to the target.</td>
<td>How to serve as plaintiffs, understanding the legal system.</td>
</tr>
</tbody>
</table>
### Tool 9.2

**Campaign Strategies Checklist**

You can use the following points as a guide for the strategy development process to help evaluate if you have what it takes to implement a particular strategy.

**Direct Action Strategy.** Do we have enough juice to do the following?
- □ Turn out a mass number of people.
- □ Get the target into a room with you.
- □ Control the agenda and the target; this step requires advanced constituent leadership and a large team of leaders who can each play a specific role.

**Disruption Strategy.** Do we have the following?
- □ A core group of leaders and a broader membership base who are willing to confront and challenge the power of the state, police, or security officers, and at least some of whom have some experience doing so.
- □ A well-informed, trained, and disciplined membership.
- □ A strong tactical team of leaders who can make quick decisions and negotiate with authority figures.

**Legislative Strategy.** Do we have the following?
- □ The ability to move people in decisive legislative districts to move their own legislator.
- □ Enough people in enough districts to get a critical mass of support for the legislation.
- □ The ability to move the legislative leaders, such as committee chairs, who must play a role.
- □ A staff person or leader who can dedicate the time needed to follow up with legislative staff on the status of the legislation and related matters.
- □ Leaders have the skills to negotiate and compromise over policy issues.
- □ Knowledge of the process for city, state, and federal budget development and bill making.
- □ The ability to write legislation or relationships with groups who could help do so.
- □ Time to work the resolution of the issue through the slow process of legislation.

**Advocacy Strategy.** Do we have the following?
- □ Access to targets, policymakers, and decision makers.
- □ Knowledge about what is happening in the field or in the community that shows our credibility as community representatives.
## Tool 9.2
### Campaign Strategies Checklist, Cont’d

- The capacity to do effective research and to develop easily understandable policy recommendations—either internally or with outside assistance—that deal with our issue.
- A target who responds to rational and good-government arguments as opposed to ideology.
- A base of organizational power that will make the target listen to your ideas.

### Alliance-Building Strategy. Do we have the following?

- The ability to compromise and negotiate with other groups working on the issue.
- The ability to bring some power to the table and to be able to use that power when needed.
- The ability to find other groups that have power, want to work on our issue, and will make it a real priority for their organization.
- The organizational capacity, including staff time, to engage in both the base-building needed to remain powerful as well as the alliance-building needed to have an effective partnership.
- The membership support to move slowly on an issue and to devote time to sharing control with other institutions.
- Members and leaders who can regularly participate in alliance-building activities.

### Media and Public Education Strategy. Do we have the following?

- A comprehensive media plan with clear goals and objectives, including target audiences and a clear message.
- Organizational capacity and commitment to deal with the multifaceted components of implementing a media plan.
- Leaders and members who can deliver a message about complicated issues in understandable sound bites to both to reporters and live audiences.

### Legal Strategy. Do we have the following?

- An in-house legal team or a partner organization that has expertise in legal matters.
- A leadership and board that is willing to integrate a legal strategy into the organization.
- The ability to respond to the particular requirements of a legal strategy that may affect other aspects of the organization’s work, such as city contracts or conflict-of-interest laws.
Tool 9.3
Campaign Strategy Assessment

You can use the following questions to organize what you know about the target and your own power and to choose an effective strategy to move him or her.

What Is the Target’s Position and What Does He Respond To?
- Does the target support or oppose our demands?
- What tactics does he respond to and what does he not respond to?
- Who does he listen to and care about?
- What are some recent examples of what moves the target successfully?

How Much Power Does Our Organization Have?
- Do we have enough members to get a response from the target?
- Which leaders want to work on this strategy and are willing to put in time?
- Can we mobilize our members?
- Will the target meet with our organization?
- Does he feel that he needs to deliver to our members?
- Does our organization have the ability to disrupt the day-to-day business of the target or people connected closely to the target?

What Power Does Our Organization Need to Add?
- What other groups are with us?
- Who will oppose our demands or get involved in the issue once we start to move on it?
- Do we have the power not only to move a target but also to deal with people who oppose us or throw us off track?

What Is Our Organizational Capacity?
- Which staff members can we commit to this campaign?
- Do we have organizational experience (staff, board, or leader) to help us develop and implement a successful campaign?
- How much money do we need to conduct this campaign effectively?
- How much money do we have that we can commit to this campaign?
- How can we raise money for this campaign?
- How will this campaign bring in new members and develop our leadership base?
- What other resources or support will we need to put into this campaign?
Tool 9.4
Sample Agenda for a Strategy Session

The following session requires about three and a half hours, which includes enough time to review all the information as well as adequate time for discussion, evaluation, analysis, and decision making. (See Tool 1.3 in Chapter One for the “Six Ss for a Successful Meeting.”)

Step One: Background

Welcome. (10 minutes) The facilitators welcome everyone. Throughout the session, they practice cofacilitation and shared leadership.

   The facilitators ask people to introduce themselves, say their role in the organization, and explain why they are involved in planning this campaign.

Research tour. (15 minutes) The facilitators ask people to go around and look at the research information posted on the walls. After a few minutes, everyone finds a partner and talks about what they’ve read. The facilitators can suggest structured questions or just have people talk for a few moments. The research tour serves as a warm-up exercise for the session.

Review goals for this campaign session. (5 minutes) The facilitators review the following goals for the meeting and answer any clarifying questions:
   1. Understand what campaign strategy is and the different types of strategies that are possible. (See Tool 9.1.)
   2. Identify the campaign strategies we will use in developing our campaign plan.

Review campaign goals and demand. (5 minutes) The facilitators review the goals and demands for the campaign and make sure everyone is clear about them.

Campaign research overview. (10 minutes) Members say what they think are the most important points from the research. People from the core leadership team say what they think is most important.

Campaign strategy overview. (10 minutes) The facilitators review the various campaign strategies possible and answer any clarifying questions.

Step Two: Choosing the campaign strategy

Lay out the scenarios. (20 minutes) Leaders from the core team present the scenarios for this campaign and answer clarifying questions.

Consider each scenario. (60 minutes) The facilitators use Tool 9.3, Campaign Strategy Assessment, to guide a discussion about the strategy that people want to pursue in this campaign. They point out what is needed to implement each strategy. The facilitators keep the following in mind:
Tool 9.4
Sample Agenda for a Strategy Session, Cont’d

- **Timed decision making.** The facilitators time the discussion and move it steadily toward a clear decision. To get everyone talking and energized, the facilitators intersperse the large-group discussion with questions posed to pairs and small groups.

- **Actions are not strategies.** Depending on the experience of the group, the facilitators may need to clarify the difference between actions and strategies. Campaigns are made up of strategies; strategies are made up of actions. It’s common for people to say, “Let’s do a march!” The facilitators and other leaders are prepared to talk about how a march is an action, not a strategy.

- **Making a case.** Leaders learn to make a good case for the strategy they think will work, based on their experience and instincts. They talk about campaigns they’ve participated in and help others to see the clear reality of a political situation.

**Break. (15 minutes)**

**What if.** (30 minutes) Although the what ifs have likely come to the surface, when the group reconvenes it looks in depth at all the angles for each possible scenario. What if the mayor loses her reelection bid? What if no one comes to our major actions? What if the budget process in the state capital gets delayed? Good strategy decisions require a thorough evaluation of the what ifs.

**Going with what the members want.** (40 minutes) The facilitators move members toward a consensus decision, or, if necessary, a vote. Members may want to try strategies that the leaders or staff do not think will work. In a community power-building organization, you need to listen to what the people most affected by this campaign really want to do. Community Voices Heard has at times gone ahead with strategies the members wanted even when the most experienced leaders or staff in the organization did not think they would work. When this happens, build in clear points for the members to evaluate together whether or not the strategy is moving the target.

**Step Three: Wrap up.**

**Review strategy decisions.** (10 minutes) The facilitators review the decisions made during the session and the follow-up steps that need to occur.

**Close.** (10 minutes) The facilitators conduct a quick meeting evaluation. They go around the room and quickly ask people to say what they thought about the meeting and the plan for moving forward. One way to close a long meeting that leads to an important decision like this is to go around and ask each person to say one word that describes what they are feeling, so you hear a rapid round of “energized,” “psyched,” “nervous,” “exhausted,” “can’t wait.” You get everyone’s voice into the room and get a charge for moving forward.

The facilitators thank everyone for participating.
Exercise 9.1

What Is Strategy? The “Give It Up!” Game

The following exercise helps people understand what strategy is. This game is a useful energizer for a long meeting.

**Time:** 20 minutes.

**Materials:** Small trinkets, such as books, pens, T-shirts, hats, mugs. (If you can’t get these items, use the alternative in the second step.) Give it Up! cards for people to fill out with their strategy. A list on a flip chart for debriefing.

**Roles:** Facilitator.

**Room set-up:** Enough room for people to see each other clearly. A flip chart board for debriefing the exercise.

- The facilitator gives each person a trinket.
- The facilitator asks everyone to stand up and check out everyone else’s trinkets. (If you don’t have trinkets, the facilitator asks people to stand and check out what other people are wearing or holding, such as a pen, a pair of earrings, a sweater.
- The facilitator tells people to decide what someone else has that they want.
- The facilitator passes out Give It Up! cards; each card has five questions on it:
  1. What do I want?
  2. Who has it?
  3. What approach will I take to get what I want?
  4. What am I specifically going to do to get what I want?
  5. What will make the other person give it to me?
- The facilitator asks people to take five minutes to fill out the cards.
- The facilitator reviews the following components of strategy assessment, and jots them down on a flip chart, saying that each component reflects the questions on the Give it Up! cards:
  - Demand:
  - Target:
  - Strategy:
  - Actions:
  - Pressure Points:
- The facilitator asks a few people to say what they wrote and notes it on the flip chart next to the corresponding organizing concepts.
- The facilitator uses the examples to ask if a person would get what she wants just by starting to act. The debrief points out the difference between specific actions and the plan behind them.
Exercise 9.2
What Will Move the Target?

You can use the following as a quick exercise to help staff or leaders review the basic considerations for determining what strategy will move a target.

Target A is the mayor of a major city. The mayor does not have to worry about voters because it his last term. He has no other political ambitions and has a good job in the private sector to return to. He is quite wealthy and not beholden to donors.

He has no politics. He is a manager technocrat who wants things to work well. He very much wants to be known as a problem solver who got things done. He strongly believes in the private sector. He is socially liberal and makes personal donations to a wide range of nonprofit groups in the arts and children’s services.

Answer the following questions:

• What is the mayor’s self-interest?
• What does he care about?
• What does he respond to?
• What strategy might move this target? What strategy would not move this target?
Exercise 9.3
Using Your Campaign Experience to Train on Strategy

The following offers an outline for doing a strategy exercise using a campaign your organization has conducted or a campaign that someone can talk about in detail. Participants need to have some knowledge about the target or you need to be able to substitute a “mock” target. For instance, we have successfully done the following exercise using the example of the Community Voices Heard Transitional Jobs Campaign and substituting the current mayor of New York City for the actual target of the campaign, who was the city council speaker.

Time: 90 minutes.

Materials: Campaign Strategy Assessment and Campaign Strategies Checklist for each participant.

Roles: Facilitator. Campaign resource person with knowledge of the campaign.

Room set-up: Enough room and moveable chairs for participants to form small groups.

- Participants form small groups (Example: For twenty total participants, five groups of four.)
- Campaign resource person(s) reviews the elements of the sample campaign for the full group: issue, goal, demand, target. (10 minutes)
- Facilitator distributes Campaign Strategies Checklist (Tool 9.2) and Campaign Strategy Assessment (Tool 9.3)
- Participants address the first section of the Campaign Strategy Assessment: What is the target’s position and what does he respond to? (10 minutes)
- Facilitator reviews the strategies and what an organization needs to pursue them, using the Campaign Strategies Checklist. (10 minutes)
- Small groups convene and decide what they need to know about the organization, the political environment, allies, media, and so on in order to choose a strategy. They develop a list of questions. They may use the Assessment and Checklist for reference. (15 minutes)
- Participants come back together. Each small group asks the campaign resource person(s) their questions. (About 10 minutes, depending on the number of small groups.)
- Small groups reconvene and choose one or more strategies they believe will work to move the target and win the campaign. (15 minutes)
- Participants reconvene and discuss what strategies they chose and why. (10 minutes)
- Campaign resource person(s) tells what actually happened in the campaign. (5 minutes)
- Participants evaluate the exercise and review what they learned. (5 minutes)
Planning a Comprehensive Campaign

P L O T T I N G  O U R  P L A N —
D E C I D I N G  W H A T  W E  W I L L  D O

Fifteen Community Voices Heard (CVH) members gather on a Saturday morning. They greet each other and pass around a pot of coffee. They are excited to be ready to make some final decisions and put together the pieces of the jobs campaign plan. They walk around the conference area, read sheets of chart paper posted on the walls, and refer to their handouts. One chart has a large picture of the target, City Council Speaker Peter Vallone. It lists who he listens to, who could move him, and possible actions and tactics that could move him. Another chart is a power analysis that shows the other organizations that support the demand for jobs, which organizations have not yet made a decision, and which organizations could potentially oppose the campaign. Another piece of paper outlines the strategies members have chosen: build a base of workers and an alliance with the city’s largest municipal union, and use a media and public education strategy to support the main strategies.

Over the course of this full-day meeting, members develop objectives for recruitment, including working to get the chair of the city’s General Welfare Committee to introduce the jobs bill. They identify actions that will help to move the union and raise public awareness. They decide how they are moving forward.

What Is Campaign Planning and Why Is a Campaign Plan Important?

In campaign planning, you plot how you will mobilize your power to move a target to deliver on a demand. A plan helps you reach your goal and implement your campaign strategically and effectively.
You also determine a public message that communicates the problem and its solution. You make final decisions about your objectives, and you outline the timing and nature of actions and tactics. Finally, you put all the decisions into a written plan to guide the implementation of the campaign.

Without a campaign plan, you are more likely to engage in unfocused activities that do not contribute to getting targets to meet your demands. A campaign plan also provides benchmarks you use to evaluate the progress of the campaign and the impact of specific actions. The organization uses it to communicate clearly how it is addressing an issue.

**What Does a Campaign Plan Include?**

*The campaign plan includes nine major components:*

- A campaign goal
- A demand or set of no more than three demands
- A primary target
- A secondary target, if needed
- Key strategies that will support your primary strategy of base-building
- A series of objectives that you can evaluate
- A preliminary message that you will continue to develop and refine
- The major actions you want to execute
- The types of tactics you either could or should not use, based on your target analysis

**Tool 10.1,** the Components of a Campaign, provides a handout listing these nine elements and what they are for, along with an example of each. **Table 10.1,** Components of the Campaign Plan, shows how each of these elements works in the plan.
Table 10.1
Components of the Campaign Plan

<table>
<thead>
<tr>
<th>Element</th>
<th>At the End of Planning You Will Have...</th>
<th>Definition</th>
<th>Action</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>An agreed-upon common campaign goal</td>
<td>What you ultimately want to achieve: the big picture.</td>
<td>Structural change in power.</td>
<td>End the Work Experience Program (WEP) for welfare recipients.</td>
</tr>
<tr>
<td>Demand</td>
<td>A clear, targeted demand or set of not more than three campaign demands.</td>
<td>The specific programs and policies that you want to change or see happen.</td>
<td>The city council creates and implements a public policy.</td>
<td>Create a paid transitional jobs program for ten thousand welfare recipients.</td>
</tr>
<tr>
<td>Primary target</td>
<td>Everyone in agreement and understanding who the target is and why.</td>
<td>The person who can give you what you want.</td>
<td>Target identification determines the target.</td>
<td>Speaker Peter Vallone</td>
</tr>
<tr>
<td>Secondary target</td>
<td>If the analysis shows you only have enough power to move a secondary target, you will identify and agree to who that person is.</td>
<td>The person who can apply pressure to move the target to deliver on your demand.</td>
<td>Power analysis combined with target analysis gives you the secondary target.</td>
<td>The head of the municipal union.</td>
</tr>
<tr>
<td>Strategy</td>
<td>Identified the key strategies you will use to support your primary strategy of base-building.</td>
<td>The way or ways you use your power to win your demands.</td>
<td>Implement a coordinated legislative, direct action and media strategy.</td>
<td>Get media coverage to move speaker, build public support for transitional jobs, and neutralize opposition. Build a base of workers to move union and speaker. Create and pass a city council bill for transitional jobs.</td>
</tr>
<tr>
<td>Objectives</td>
<td>A series of objectives that you can evaluate.</td>
<td>The steps you need to take in order to get what you demand. How you measure progress toward your goal.</td>
<td>A city councilperson who is accountable to welfare recipients and exercises power over the council speaker who can get legislation passed.</td>
<td>City councilperson introduces a Transitional Jobs bill.</td>
</tr>
<tr>
<td>Element</td>
<td>At the End of Planning You Will Have . . .</td>
<td>Definition</td>
<td>Action</td>
<td>Example</td>
</tr>
<tr>
<td>---------</td>
<td>-------------------------------------------</td>
<td>------------</td>
<td>--------</td>
<td>---------</td>
</tr>
<tr>
<td><strong>Message</strong></td>
<td>A preliminary message that you will continue to develop and refine. This message may change as you target it for different audiences.</td>
<td>A short, three- to five-sentence statement that addresses the problem and the issue or the solution you seek.</td>
<td>At a press conference announcing the results of a study of the workforce system, the members who speak on behalf of the organization include the campaign message as part of their statements.</td>
<td>The WEP program is a “public-sector sweatshop” that forces people to work in dead-end jobs with no education or training. The Transitional Jobs Program will replace WEP with a program that provides a living wage to workers and education and training to help them move to full-time employment so they can support their families.</td>
</tr>
<tr>
<td><strong>Actions</strong></td>
<td>Identified major actions that you want to execute. You do not plan the actions in this stage, you just identify the type of action and when it will take place.</td>
<td>A collective show of power that directly aims to move a target or decision maker.</td>
<td>The organization exercises power in connection with a demand.</td>
<td>A mass direct action. (Or a more specific action, such as a WEP worker march to coincide with May Day.)</td>
</tr>
<tr>
<td><strong>Tactics</strong></td>
<td>Identified the types of tactics that you may—or should not—use, based on your target analysis.</td>
<td>What you do to challenge or engage powerholders and achieve the goal of an action.</td>
<td>The leaders decide on two or three specific components of an action.</td>
<td>The plan may include the following details or more generally say “people power in the streets”: A group of CVH members delivers invoices to city hall demanding back pay for their unpaid WEP jobs, and members write letters to the editor about the problems with WEP and the need for a transitional jobs program.</td>
</tr>
</tbody>
</table>
Why Do We Need a Written Plan?

*When you write out the plan, the organizing committee has a detailed, time-specific work plan it can use to guide the campaign.*

A written plan helps you do the following:

- **Keep on track.** When you outline every aspect of the campaign and place it on a timeline, you stay focused.

- **Conduct effective, ongoing evaluations.** You guide important conversations among members and leaders about problems in the campaign and what you are doing right.

- **Know when you have reached an objective and can move forward.** You avoid getting stuck.

- **Assess and evaluate inevitable shifts.** The plan helps you assess shifts and changes in the issue as well as in power dynamics, public sentiment, or funding.

- **Easily communicate about the campaign with the entire organization.** Leaders, members, and constituents all read and understand the plan.

- **Facilitate political education, training, and leadership development.** People see the reasons for choosing specific targets, strategies, and tactics. Everyone learns about the political process and the real world of policymaking and power.

How Do We Do Campaign Planning?

*Campaign planning occurs in a series of meetings between individuals and in small groups, then generally culminates in a larger meeting where members and leaders look at all the pieces together and agree about how to proceed.*

You include members and leaders in campaign planning to get their buy-in on the campaign and to choose strategies, objectives, and messages that resonate with them. There are four steps for effective campaign planning:

**Review decisions.** The organizer and leaders review the decisions about the goal, demands, target, and strategy. They confirm that all the pieces hang together.

**Develop objectives.** Members develop objectives, the steps to win the demand.

**Develop a message.** The organizer and leaders develop a campaign message to help make sure that everyone in the organization communicates clearly and consistently about what you want and what you are doing to get it. You devote at least one session and some time to test the message during planning.
Hold a campaign planning session. Once all the information is in and members draft their decisions, you hold a campaign planning session to lay out the plan and have members ratify it.

**What Is a Campaign Planning Session?**

A campaign planning session is a meeting or series of meetings where members see the results of the research and development phase and use this information to finalize and ratify a plan.

If your campaign planning includes many new people, you may hold a series of weekly evening meetings or a long weekend meeting in order to provide any necessary training and to move through all of the information thoroughly. You address a different question each night: “What is our strategy?” “What is our message?” You then come together on a Saturday for a final campaign planning session where members review and fine-tune the preliminary decisions and ratify them.

This process applies to a proactive campaign, where you have time for extensive planning. For a reactive or crisis situation, you make decisions over a shorter period.

**What Are Campaign Objectives?**

Objectives are the steps you take to move your target to meet your demands.

An objective has a specific outcome and is measurable. You have several objectives in a campaign. These outcomes in and of themselves have limited effect, but together they create a change. Here are two examples of campaign objectives: recruit two hundred new members; get five articles in local newspapers. Generally, you have the following four types of objectives:

**Processes.** Periods of time in which you conduct specific activities. In a campaign plan you identify when something starts and when it ends. For example, “On April 1, we will initiate doorknocking to recruit public housing residents; we will end doorknocking on May 30.”

**Deliverables.** Measurable, concrete accomplishments or tangible products. For example, “three hundred new members,” “two hundred surveys completed,” “a legislative bill,” “a research report,” “an article in a major paper.”

**Internal actions.** Collective organizational events that test your organization’s capacity, leadership, and the resonance of an issue, and that train leaders. Examples include a town hall meeting or a mass canvass. (We describe internal actions in more detail in Chapter Twelve.)
Direct actions. Collective displays of your organization’s power. Activities and events you can evaluate that you design in order to get a reaction from the target. For example: “Did we pull off an accountability session in June? Did the mayor come to the accountability session?”

How Do We Determine Campaign Objectives?

A small group of leaders and staff draft objectives that members further develop and ratify in the campaign planning session.

In developing objectives, you continue to conduct some research about how you will meet each objective. There are usually two versions of how things get done. One way is “by the book.” For example, the legal process of how a bill becomes a law. You generally find this information in the library or on the Web page of an agency, government body, or for other types of changes, corporation.

Then there is the “reapalitik” version. How do things really work? What are the politics of an issue? Who do you have to move to make sure the right person does what you need him to do? You generally find out this information more informally, through conversations with political people, reading the newspaper, and talking to allies. Balancing “by the book” with “reapalitik” ensures that you develop the full range of objectives you need in order to win.

The following three factors determine the objectives:

- The demand. You break down the process for meeting the demand. For example, if the demand is to stop a developer from building on an open space, one of the objectives is to ensure that the developer secures an environmental impact report before moving to bulldoze the area.

- The strategies. Strategies also determine objectives. For example, if you are using a legislative strategy to get a bill passed, you establish objectives to get it introduced into the legislature, identify a sponsor for the bill, and secure the sponsor’s support.

- Organization-building. Because the main strategy is base-building, you include objectives that encompass as many members of the organization as possible and that push the organization to expand its base. For example, if one of the objectives is to bring students into your organization, then another is to move students who are in the general membership to become working members and leaders.

What Is a Campaign Message and Why Do We Need One?

A campaign message is a three- to five-sentence statement that states the problem, its solution, and the way to implement the solution. You need to send a message to the
world outside of your organization about what you want and why others should support you.

Members, leaders, and organizers use a message to clearly and consistently communicate about the campaign. You always have a campaign message, even if you decide that the campaign does not have a full-scale media strategy or a media plan. Members include the message when they talk with the media. Leaders and staff convey the message when they recruit members, meet with allies, or directly make a demand of the target.

A campaign message includes the following elements, with examples of each:

*A problem.* People on welfare are not getting adequate education, training, and paid on-the-job experience in the city’s workfare program. They need these benefits to get off welfare and stay off.

*A solution.* The transitional jobs program will use federal funds to put people to work in living-wage jobs. The recipients will provide important city services while they get the education and training that will help them get the skills they need to get a permanent job.

*An action.* Tell the mayor to implement the Transitional Jobs Bill today.

A campaign message is essential for the following reasons:

*Establishes talking points.* The message provides members with clear, consistent talking points for the campaign.

*Communicates goals and objectives.* The message ensures that the problem, solution, and action you communicate to media, allies, targets, and others reflect the campaign goals and objectives.

*Builds understanding of the issue.* The message puts complicated campaign and policy details into simple, forthright language, ensuring that your target audience and others whose support you can understand the issue, the solution, and the action. It appeals to a broad audience, beyond your core constituency.

*Frames media strategy.* If you are using a media strategy or need a media plan for the campaign, the message provides a beginning frame for more detailed media planning.

**How Do We Develop a Campaign Message?**

*You develop a campaign message by drafting and testing phrases with members, leaders, and staff.*

If you have the time and resources, you also test the message with people outside of your organization, including allies and your target audience.
You develop a message once you have the components of the campaign plan. You need to know the specifics of what you want and how you will get it, as this is what you need to communicate. You use the following steps to develop a message.

- **Review the campaign.** Review the campaign goals, demands, and strategies.
- **Determine the primary audience.** Whose support do you need in order to win? Who are you seeking to move in order to meet your objectives? Who are the affected constituents, allies, elected officials? Your audience is specific. It is not the general public. You develop a basic message for your audience that you can tailor for others.
- **Draft the message.** Develop and write out the problem, solution, and action in a few brief sentences.
- **Test the message.** Conduct focus groups and one-on-one meetings with the people you want to move. Revise the message if needed.
- **Train the messengers.** Train members and leaders to deliver the campaign message.
- **Refine the message.** Fine-tune and adapt the message over the course of the campaign.

Once you develop a basic message, you stick with it, but you tailor it for different audiences. For example, if you want to use a strategy of alliance-building with unions, you develop a message based on the campaign message that appeals specifically to their self-interest and organizational concerns.

**What Is the Role of the Organizer in Campaign Planning?**

*The organizer offers ideas and possible scenarios throughout the planning process and helps members to clearly consider their data.*

Ultimately, however, it is the members’ plan. The organizer writes it up but does not have final approval. Organizers do not lead meetings or make campaign decisions—these are activities for the members of the organization. The organizer helps convene a large membership meeting to walk through and ratify all aspects of the campaign plan. In this campaign planning meeting, the organizer helps leaders to challenge members and one another to stretch their thinking.

An organizer is not just a facilitator, but an active participant with a role to play in helping members to make good decisions. Both in the planning process and in ratifying the plan, the organizer guides members and leaders to be realistic in their
assessments and asks questions that make them think about what they are planning, saying, or developing.

In the end, it is the members and leaders of the organization—not the organizer—who need to be comfortable carrying out the plan’s strategy, actions, and tactics. If the organizer disagrees with the members’ decisions, he or she still abides by them.

What Does a Campaign Plan Look Like?

A campaign plan is clear and simple. It is easy to read and to reproduce. It contains each of the elements shown in Table 10.1, with actions and tasks filled in for each objective, along with a time frame.

Tool 10.2 outlines a sample planning session (or series of sessions) that uses Exercise 10.1 (Action, Activity) and Tool 10.3 (Case Study) and Tool 10.4 (Campaign Planning Worksheet) to work through the steps of campaign planning. Tool 10.5 (Getting to a Written Campaign Plan) provides a summary and timeline of campaign development activities up until this point. The following case study provides an example of what a written campaign plan might look like, based on a CVH campaign. The power analysis for this campaign was described in Chapter Eight.

Mayoral Workforce Development and Poverty Campaign:

Goal: (The big picture. What we ultimately want to achieve.) Get the mayor to address poverty and joblessness after the mayoral election.

Demands: (What we want. The specific programs and policies that we want to change or see happen.)

• Create a blue-ribbon commission to research, study, and make policy recommendations on the problems of poverty and joblessness
• Create a new position of Deputy Mayor for Workforce and Human Development

Strategies: (How we will win. Methods for putting our power in motion to win our demand.)

• Direct Action: Getting our target in the room to show our power
• Media: Moving the media to cover our issue and raise our demands
• Electoral: Using our political power to move a target who is running for re-election (see Resource G for more on electoral organizing)

**Message:** (What we will tell the world.) Sample messages:

In New York City, one out of five people lives in poverty. This number is unacceptable in one of the world’s richest cities. Unemployment and joblessness affect communities of color particularly hard. We are demanding that the next mayor prioritize addressing poverty and reducing joblessness and unemployment. We believe that the mayor must make ending poverty and joblessness number one on his list of priorities. The next mayor can do this by creating a new deputy mayor position that focuses on these issues and creating a blue-ribbon commission to look at poverty and its causes and to make concrete recommendations to the mayor on policies to address the problem.

Or, depending on the audience:

In New York City, one out of five people lives in poverty. As a result, many people are homeless or at risk of losing their home and going hungry. Many children and youth do not have access to resources, services, and programs that could give them a strong start at the beginning of their academic career. This situation is wrong in a city that has so much wealth and resources. Community Voices Heard is asking that the next mayor create a blue-ribbon commission to come up with recommendations on how to address these issues through concrete policies and programs in his second term. We are asking that you communicate this to the mayor by signing this postcard telling him you are concerned about poverty and that you believe he needs to make addressing poverty a key priority in his second term.

**Target:** (Who can give us what we want.) The mayor.

**Resources:** (Staff, money, base):

• Organizing committee of twenty-five leaders
• One staff organizer; one part-time lead organizer, one part-time policy staff person
• Four part-time canvass staff
• Five thousand CVH members and voters
• $1,000 for an event
Objectives

Objective 1. Organize accountability forum with mayoral candidates

**Action:** Invite mayoral candidates to forum

**When:** (By month, by week) Secure candidates’ commitment by October 1

**Tasks:** Send out letters
Call candidates
Schedule candidates
Schedule space and identify logistical needs
ID and train leaders
Recruit and train volunteers
Develop mobilization plan

Objective 2. Collect 2,500 pledge cards to deliver to candidates

**Action:** Get voters to sign Pledge to Vote on Jobs cards

**When:** August 15–October 15

**Tasks:** Develop and print cards
Develop walk lists to go door to door
Train staff and leaders in gathering pledge cards

Objective 3. Develop media message for CVH media work

**Action:** Organize media committee meetings

**When:** July–August

**Tasks:** Organize meeting
Train members
Develop message

Objective 4. Inject issue of poverty in media campaign coverage

**Action:** Organize media events and conduct media outreach to targeted media covering mayoral election

**When:** August–November
Tasks: Train members in press points
Contact press contacts and reporters to get story placement
Organize two or three media events to get coverage
of poverty

Leadership team: Key leaders participating in the CVH jobs campaign

Base: (Describe who, how large, how solid). Base will be CVH core members
involved in CVH jobs campaign. Goal is to turn out 100 to 150 people from this
base. Target new base of 2,500 East Harlem and South Bronx voters—goal of 100
people turning out from this base for a total of 250 for this action.

Member and leader development activities:
• Media work
• Recruitment, mobilization for event, and to get pledge cards
• Running accountability meeting
• Running organizing meetings
• Organizing media events

Member and leader training needs:
• Public speaking training
• Facilitation training
• Recruitment training
• Phone-banking training
• Target meeting training

How Do We Ratify the Campaign Plan?
You strive for consensus, but eventually a majority vote determines if the organiza-
tion accepts the campaign plan.

By the time members vote on the plan, they have already had extensive input
into developing the campaign. However, sometimes you cannot reach consensus
about key elements, particularly on demands, strategies, and goals. The campaign
plan is only effective if these elements are clear and concise, not watered down for

Planning a Comprehensive Campaign 221
the sake of reaching an agreement. If you accept the plan based on a majority vote, you may lose those who disagree. But if you use a democratic and fair decision-making process, people usually finalize the plan and move on.

**LEADERSHIP DEVELOPMENT OPPORTUNITIES DURING CAMPAIGN PLANNING**

- *Interview, listen to, and engage others.* Leaders make high-level choices where resources, policies, and values are all at stake. They involve as many other people as possible in the campaign through one-on-one conversations with other members to get their views and buy-in on the campaign. They are trained and debrief with an organizer in order to build interviewing and listening skills. Leaders prepare and facilitate small-group meetings, such as those to choose objectives and develop a message.

- *Build ownership.* Leaders make recommendations about the best choices for the campaign and represent the proposed plan to other members in the same situation who are trying to make a difference. Gaining the powerful experience of coming together to make and ratify decisions collectively shows members that this is their organization and that they are building their political power.

- *Develop and test messages.* Communicate effectively with a wide range of people.

- *Ratify the plan.* Leaders play a role in the membership meeting where the organization will ratify the written campaign plan. A team of leaders meets with the organizer in the days before the meeting to review the written plan and any handouts for the meeting, finalize an agenda, review tasks, practice what everyone will say, and gel as a team.

**CHALLENGES IN CAMPAIGN PLANNING**

“Our members are skipping some essential objectives in their planning discussions.” If members and leaders are planning the campaign based on faulty logic, the organizer helps them get back on track, referring back to research findings or decisions the group has already made. The organizer does not tell them they are wrong but instead probes them to think more deeply.
“The leaders are suggesting realistic pieces, but the total plan is too ambitious.” Use your assessment of organizational capacity to guide leaders and members to establish a realistic plan.

“We are not able to do all we need to do in the planning sessions but people are ready to move on the campaign.” The most important aspects of the plan—the goals, the target, the strategy, and the objectives for the first three to six months—are critical. Once you establish these elements you can get started and work out how to address the other components of the plan over time. Although it is good to have the message ready, you can test and decide on it after you kick off the campaign.

**Essential Elements for Effective Campaign Planning**

- **Don’t over-plan.** Leave room to evaluate your work and respond to the changing political environment.
- **Build off campaign development.** Directly use what you learned while researching the campaign and developing the main components.
- **Prep leaders for the campaign planning sessions.** Prepared leaders help ensure that the campaign plan effectively builds off of campaign development. Prioritize this element, don’t let it fall to the bottom of the list.
- **Use the campaign planning session to make decisions.** When members and leaders gather for the campaign planning session, they are there to make final decisions, establish buy-in, and lay out what the coming months will look like in the organization.
- **Remember—every action causes a reaction.** Once the campaign gets under way, you execute your plan in relationship to how the target reacts to your organization’s actions.
**Tool 10.1**

**The Components of a Campaign**

*You can use the following as a handout or on a flip chart to orient members and leaders during campaign planning.*

**Goal.** The big picture. What we ultimately want to achieve. (End childhood hunger in our community.)

**Demand.** What we want. The specific programs and policies that we want to change or be implemented. (More food subsidies for families.)

**Strategy.** How we will win. Methods for putting our power in motion to win our demand. (Media and public education, direct action.)

**Objectives.** How we will get there. The steps we need to take in order to get what we demand. How we will measure progress toward our goal. (Objective #1: Twenty-five Teach-ins; Objective #2: Turn out one thousand people during state budget process.)

**Message.** What we will tell the world. A short, two- or three-sentence statement that addresses the problem and the issue or the solution we seek. (“One out of every five children in our community goes to bed hungry, even in families where both parents work. The effects of hunger—on kids and on our entire community—are profound and preventable. Our state is considering a bill to put an end to childhood hunger that costs taxpayers less than their Monday morning coffee.”)

**Target.** Who can give us what we want. (The chair of the state senate finance committee.)

**Action.** What events we will do. A collective show of power that directly aims to move a target or decision maker. (Pack the budget hearings in the state capitol.)

**Tactic.** What activities we will do. What we will do to challenge or engage powerholders and achieve the goal of an action. (Conduct mass street theatre on capitol steps during the budget process, hold legislative meetings.)
Tool 10.2
Sample Campaign Planning Session

The following campaign planning session totals eight hours. You can distribute planning over a series of evenings, over a day and a half, or do it in one day, as we show here. In this sample session, we assume about twenty people are participating. Core leaders are cofacilitating the meeting with support from staff. When we refer to the facilitator, we mean one member of the small team of people who are guiding this session.

Part One: Introductions and Warm-up. (1 hour—9:30–10:30 a.m.)
Review objectives. People get to know each other, agree on the goals of the meeting, and get in the mind frame for campaign planning.

Introductions. The facilitator asks everyone to go around and say their names and one or two sentences about how and why they got involved with the organization and the campaign. (20 minutes)

Warm-up exercise. Action, Activity. (See Exercise 10.1) (30 minutes)
The facilitator explains that the purpose of doing this exercise is to help people get further acquainted and to get them thinking about the kinds of actions and activities they might want to plan for the campaign.

Review goals for the meeting. The facilitator reviews the goals for the meeting and confirms that everyone understands and agrees that this is why they are here. (10 minutes)

The main goals of the meeting are:

• Develop objectives for the campaign.
• Start to identify the kinds of actions and tactics we will use.
• Agree on the goal, demands, target, and strategy for the campaign.
• Develop the campaign plan.

Part Two: Understanding Campaigns (3 hours—10:30–1:30)
Objective. Participants identify the basic components of a campaign.

The Components of a Campaign. The facilitator reviews the components of a campaign (see Tool 10.1 for a sample handout). If the organization has done campaigns before, the facilitator guides the group through a discussion of each of the components of one of those campaigns. Alternately, she distributes a sample
**Tool 10.2**
**Sample Campaign Planning Session, Cont’d**

campaign case study. (A sample case study appears in Tool 10.3.) Participants read the case study aloud. In small groups, they identify the components of the campaign in the case study. The groups come together to distinguish the different parts of a campaign. **(30 minutes)**

**Actions and tactics.** In groups of three, participants talk about actions and tactics they have used in the past or have heard about. The facilitator and leaders give examples from past campaigns. The facilitator also refers people back to the Action, Activity exercise they did earlier. The small groups write about the actions they’ve used or heard about and post them on the walls. They then walk around and look at what people have written. This is raw material for planning the campaign, which participants will do after lunch. **(30 minutes)**

**Lunch.** **(30 minutes)**

**Campaign goals, demands, and target.** The facilitator reviews the goals, demands, and target of the campaign. The presentation includes handouts or charts and pictures of the target. The person doing the overview explains who decided on the goals, demand, and target and how they did so. She then reviews the strategies that members have chosen. The facilitator asks to hear clarifying questions. At this point in developing the campaign, if members have been engaged in the process, the group is likely to agree to move forward with the goals, demands, target, and strategy. **(30 minutes)**

**Timeline.** The facilitator sets up a calendar on chart paper that looks at four-month periods for the next year. The group reviews important dates that are critical for the campaign, including a timeline of the external factors that may affect the campaign, such as a budget process or a plan to build a new development. The group adds important dates, events, or hooks, such as the first day of school or holidays. **(30 minutes)**

**Objectives.** The team that drafted the campaign objectives reviews them with the group, connecting them with the timeline where appropriate. The group discusses the objectives. They will further develop these objectives when they develop the campaign plan. **(30 minutes)**
Part Three: Planning the Campaign (4 hours—1:30–5:30 P.M.)

**Objective.** Participants develop a plan for the campaign.

**Developing our campaign plan.** Participants form three small groups of six to eight people. The facilitator may assign people to the groups to ensure a good mix of newer and more experienced members. Each group has people in the following roles:

- Strong, trained facilitator
- Note taker
- Person to report back to the large group

Each group also has the following:

- Campaign planning worksheets (Tool 10.4) that include what’s been established so far and any helpful information from the campaign research
- Action, Activity sheets to refer to

Each small group develops a proposal for the larger group, using the worksheets as a guide. If there are multiple strategies each group can work on a different strategy, which allows a deeper and more detailed proposal. If each group works on all the strategies the proposals will be broader.

Facilitation in these small groups is important for keeping the group focused. For instance, the facilitator keeps the group focused on objectives as opposed to just talking about actions. *(60 minutes)*

**Break.** During an extended break, a core group of leaders and staff examine the campaign plans. If the groups worked on the same strategies, they look for similarities and differences. They put the information together, but clarify which group developed each aspect of the proposal. If each group worked on a different strategy, they combine the information. In either case, the group should see a timeline, similar to the one they developed earlier, with the campaign plan applied to it. If you have the technology to project it on a screen and give everyone a corresponding handout, that is best, but you can also do it manually using chart paper and large, bold lettering. *(30 minutes)*

**Campaign plan review.** Members review the full plan. Facilitators and leaders guide an assessment of what the organization can actually do, using charts and handouts
Tool 10.2
Sample Campaign Planning Session, Cont’d

as needed, to address staffing, resources, and similar capacity concerns. People form pairs and take about fifteen minutes to discuss the proposed plan, talk through any questions they have, and if the plan calls for more than the organization can take on, identify their priorities. The group comes together and makes changes as needed. (90 minutes)

Break. This break gives people a chance to digest the plan. (10 minutes)

Plan ratification. Members come back together, raise any remaining questions, and ratify the plan. The plan you leave with has to be firm enough that the organizing committee can start to implement it, but it also needs to be open for adaptation and adjustment. (30 minutes)

Meeting evaluation. The facilitator reviews the goals for the day and then checks in to see if the participants believe that they met their goals. People say what they will do to follow up on the plan. (20 minutes)

Close.
Tool 10.3
Case Study for Identifying the Parts of a Campaign

See Table 10.1 for identified components.

The Transitional Jobs Campaign

In 1997, to comply with the new federal welfare reform bill, New York City expands its welfare program for welfare recipients. Workfare requires people to work at jobs for no pay—they work in exchange for their welfare benefits. New York City’s workfare program is the Work Experience Program (WEP). WEP workers often perform jobs right alongside union members and others who are doing exactly the same thing but are getting paid a salary.

CVH organizers talk to thousands of WEP workers about what they are experiencing and what will improve their situations. The organizers learn that people want to work, but they want to replace WEP with paid jobs, with education and training.

CVH starts to talk to other groups working on workfare and welfare issues and soon partners with the Fifth Avenue Committee to explore creating a transitional jobs program. For this program to come to life, the city council needs to pass legislation—the Transitional Jobs Bill. The speaker of the city council can move the bill through the council, and CVH believes it can build enough power to move him. WEP workers meet at CVH to figure out how to get the bill introduced into a city council committee. They learn all about Speaker Peter Vallone and about who else has a stake in the campaign.

The speaker plans to run for mayor. He needs good media and the support of labor unions for his mayoral bid. The unions see WEP as a threat to unionization and a way to cut wages. The unions could ensure that the speaker supports the bill. CVH seeks to build an alliance with the union.

As they develop the campaign, members decide they want to build a base of one thousand WEP workers and develop reports and studies that show the problems with the WEP program. The organization starts to say publicly that WEP is a public-sector sweatshop that forces mothers with children to work in no-wage, dead-end jobs that do not help them get off of welfare. CVH sets out to get five hundred WEP workers to sign pledge cards supporting the campaign that they can deliver to the unions and the media.

During the course of the campaign, CVH organizes a march of WEP workers on city office buildings, where members deliver invoices to city hall asking for “back pay” for their work in WEP. This, as well as op-ed pieces, letters to the editor, and media stories CVH places, helps to put pressure on the council speaker about the failures of WEP to move people into the workforce.
### Tool 10.4
**Campaign Planning Worksheet**

You can use the following as a worksheet for participants in a campaign planning session to complete. In advance of the planning session, fill in any information that members have already decided on. Even if participants in the planning will ratify some of these decisions, they will do so more knowledgeably if the information is in front of them. For a sample campaign plan, see the chapter text.

**Goal:** The big picture. What we ultimately want to achieve.

**Demand:** What we want. The specific programs and policies that we want to change or see happen.

**Strategies:** How we will win. Methods for putting our power in motion to win our demand.

**Message:** What we will tell the world.

**Target:** Who can give us what we want.

**Resources (Staff, money, base):**

**Objective One:**

Tasks—Actions—Tactics:

<table>
<thead>
<tr>
<th>What</th>
<th>When (By month, by week)</th>
</tr>
</thead>
</table>

**Objective Two:**

Tasks—Actions—Tactics:

<table>
<thead>
<tr>
<th>What</th>
<th>When (By month, by week)</th>
</tr>
</thead>
</table>

**Objective Three:**

Tasks—Actions—Tactics:

<table>
<thead>
<tr>
<th>What</th>
<th>When (By month, by week)</th>
</tr>
</thead>
</table>
Tool 10.4
Campaign Planning Worksheet, Cont’d

Leadership Team:

Base (Describe who, how large, how solid):

Member/Leader Development Activities:

Member/Leader Training Needs:

ADDITIONAL OBJECTIVES (add as many as needed):

Objective #
Tasks—Actions—Tactics:

What
When (By month, by week)

Objective #
Tasks—Actions—Tactics:

What
When (By month, by week)

Objective #
Tasks—Actions—Tactics:

What
When (By month, by week)
Tool 10.5
Getting to a Written Campaign Plan

A Handout Summarizing Campaign Development Activities

It generally takes a few months before you start to write up a campaign plan, depending on the issue, unless a crisis forces you to accelerate the steps. No matter the time frame, you can use the following overview as a handout for training or orienting staff and members to the full process of campaign development. Seeing all of the steps laid out can help ensure that everyone is clear about all of the activities that have occurred leading up to the campaign plan or can help prepare people to undertake the process from the beginning. If you are responding to a crisis, some or all of these steps can be combined.

Issue ID

Convene Members and Leaders. In a membership meeting or in multiple meetings over a few weeks, members talk about the problems they are experiencing and what some solutions to issues might be. They begin to focus on one potential issue.

Conduct One-on-Ones with Core Members and Leaders. Staff meet with core members and leaders to talk about the potential issue and assess if they will work on the campaign. They discuss how they think it will affect the organization and who else can they recruit to work on the campaign.

Create a Leadership Team. Staff identify a group of members and leaders who can engage in issue ID activities with them, including by conducting surveys and speaking with constituents.

Survey Current Membership. The team calls members of the organization to see if the potential issue resonates with them and if they would work on it. They might ask, What do you want to get out of the campaign? What is the goal you want to achieve?

Speak with Constituents. The team goes out to see how constituents feel about the issue. To determine whether the issue would move constituents to action, they use surveys or other tools to gather information.

Review and Analyze Data. Leaders and staff review what people said in the surveys, during one-on-ones, and in the group meetings.

Develop Demands. What do the members want? The leadership team prepares recommendations for campaign demands.

Identify the Target. Leaders, members, and staff identify who has the power to give members what they want.
Tool 10.5
Getting to a Written Campaign Plan, Cont’d

Campaign Research

Check-In with Organization Members and Community Members. At a membership meeting, the team assesses if the demands resonate with members and the constituency. Members vote to move forward with the demands.

Do a Landscape of the Issue. The leadership team investigates the history of the issue and its potential future.

Engage in Target Research. The team asks, What kind of power does the target have? What kind of power does the organization need to move her or him?

Conduct a Power Analysis. The team asks, Who cares about the issue and has power in relationship to it?

Do an Organizational Assessment. The team reviews the organization’s numbers and track record. Staff ask, Will the campaign develop members’ leadership skills and build the organization?

Strategy Development

Schedule a Strategy Meeting. The leadership team establishes a date and time for a strategy meeting, at which leaders and members can choose a strategy or strategies for the campaign.

Develop Strategy Scenarios. A core group of leaders and staff develop possible strategy scenarios. They create an agenda and materials, and prepare to facilitate the strategy meeting.

Leadership and Membership Outreach

Reach Out to Core Members. Staff call members and leaders to discuss the issue, potential targets, and strategies, and to start to incorporate what they think into the plan.

Talk with Constituents. Staff and leaders go out into the community and talk to people who are affected by the issue. These conversations include discussions about the issue and campaign as well as briefings on the organization and its past campaigns.
Tool 10.5
Getting to a Written Campaign Plan, Cont’d

Strategy Meeting and Campaign Planning

Hold the Strategy Meeting. Members meet to choose a strategy for the campaign, which is based on what they’ve learned from the research.

Assess Organizational Capacity. Members ask, Given the strategy, does the organization have the staff, money, and other resources to conduct the campaign?

Develop Objectives. Leaders and staff develop objectives to achieve the goal.

Craft a Message. What is the consistent, brief message your organization will use to communicate about the campaign?

Engage in Political Education. Staff and leaders ask, What are the systems and forces behind the issue? Why does the problem exist, and who does it affect? Who benefits from it?

Hold a Campaign Planning Session. Members meet to review, finalize, and ratify the goals, objectives, demands, target, strategy, message, and types of actions and tactics they will use in the campaign.

Write the Campaign Plan. A staff member writes up the plan.
Exercise 10.1
Action, Activity

You can use the following as a warm-up exercise for a campaign planning or action planning session or as part of a leadership development course.

Time: 30 minutes

Materials: Brightly colored cards with actions and activities printed in large, bold letters. String or yarn. Action, Activity Chart (see below).

Roles: Facilitator

Room set-up: Enough room for people to walk around and talk in pairs.

Objective. By the end of this exercise people will have matched the different actions they can use in their campaign with the activities these actions require. They will have shared their experiences with actions and begun to name how many people each action requires.

- Facilitator hands out cards prepared in advance. Each card has either an action or an activity written on it with heavy marker or printed off the computer (see chart below for sample actions and activities). If you have photographs of the various actions, ideally from your organization, you can tape those to the cards as well. If you attach yarn or string, people can wear the cards around their necks.

- Participants hold their cards or hang them around their necks so everyone can see the wording.

- Facilitator asks the participants to find the person with the action or activity that matches their own. She holds up a sample card: Postcard campaign. Then she holds up the card that matches it: A group sends thousands of postcards to a target asking him to do something.

- The facilitator asks everyone to walk around the room and find the person with the card that best matches theirs. She encourages people to introduce themselves to each other and talk about the action and activity.

- When everybody finds a partner, the facilitator asks each pair to read their action and activity. If the group disagrees about the match, the facilitator probes with questions about why they disagree. Each time there is a disagreement about a pair, the facilitator recognizes it as a question mark.

- At the end of this process, the facilitator shows a chart or distributes a card with the correct terms and definitions (see the Action, Activity Chart that follows).
Exercise 10.1  
Action, Activity, Cont’d

- The facilitator asks how many people have participated in each action. She goes through the list and asks how many people have participated in each type of action, noting it on a chart on the wall. She asks how many people are needed for each action. This gets people thinking about the capacity of the organization.

<table>
<thead>
<tr>
<th>Action</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sit-in</td>
<td>People sit in an office waiting room without being invited and stay until they get what they want.</td>
</tr>
<tr>
<td>March</td>
<td>People walk together from one spot to another.</td>
</tr>
<tr>
<td>Press conference</td>
<td>An organization holds a meeting for the press about an issue, report, or action.</td>
</tr>
<tr>
<td>Legislative briefing</td>
<td>An organization holds an informational meeting for a group of elected officials.</td>
</tr>
<tr>
<td>Boycott</td>
<td>An organization asks people not to patronize a service or buy a product.</td>
</tr>
<tr>
<td>Strike</td>
<td>A group of people decides to walk out of their job, their school, or other place.</td>
</tr>
<tr>
<td>Rally</td>
<td>A group of people participate in an event at a public site with speakers who are talking about an issue.</td>
</tr>
<tr>
<td>Demonstration</td>
<td>People show their opposition to or need for something through a mass action at a site of power.</td>
</tr>
<tr>
<td>Picket line</td>
<td>A group of people walk in a small moving circle at the entrance of a building to educate people about an issue or discourage them from entering.</td>
</tr>
<tr>
<td>Street theater</td>
<td>People create a skit, song, or reading about an issue and perform it out in the open.</td>
</tr>
<tr>
<td>Flyering</td>
<td>People hand out leaflets to educate the public about an issue.</td>
</tr>
</tbody>
</table>
### Exercise 10.1
**Action, Activity, Cont’d**

<table>
<thead>
<tr>
<th>Action</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Town hall meeting</td>
<td>An open meeting about an issue or problem that builds membership and gets the word out.</td>
</tr>
<tr>
<td>Accountability session</td>
<td>A large meeting with a target who can make decisions and give clear yes or no answers.</td>
</tr>
<tr>
<td>Building or office takeover</td>
<td>A large group of people takes over an office with the goal of stopping it from functioning.</td>
</tr>
<tr>
<td>Lobby day</td>
<td>A group of people meet with a large number of elected officials in one day, usually at the state or national capitol.</td>
</tr>
<tr>
<td>Lobby meeting</td>
<td>People from a particular district meet with their representative.</td>
</tr>
<tr>
<td>Call-in day</td>
<td>People call a target on one day to get him or her to do something.</td>
</tr>
<tr>
<td>Disrupting public meetings</td>
<td>A group of people disrupt a public meeting such as a hearing or press conference.</td>
</tr>
<tr>
<td>Banner drop</td>
<td>An organization drops or holds a banner with a simple message in a place where the media are present.</td>
</tr>
<tr>
<td>Civil disobedience</td>
<td>People willingly and knowingly break the law to get their issue in the news. Their actions may or may not lead to arrest.</td>
</tr>
</tbody>
</table>