RESOURCES: THE PHASES AND STEPS OF A CAMPAIGN
An Annotated Case Example

You can use the following as a handout for training staff and leaders to understand the phases of a campaign and to see each of the steps for running an effective member-led campaign.

Every campaign has three phases: campaign development, campaign implementation, and campaign evaluation. Campaign development includes identifying an issue, conducting research to collect data, analyzing power, developing strategies, and writing a campaign plan. Campaign implementation is when the organization runs the campaign and engages in collective action. In the third phase, campaign evaluation, staff and leaders review the campaign and reflect on what they did and did not accomplish in order to learn from their mistakes and build on their strengths.

The following describes each step of a campaign, illustrated by a successful campaign.

Step One: Identify the Issue. An issue is the solution to a problem. First, form a leadership team of members that will move the campaign forward. This team has core members, but it is not a closed group. As other leaders develop, they can participate as well. The leadership team and staff identify the campaign issue by talking to as many members and constituents as possible about a problem they are experiencing and what they think would fix it. Clarity about the issue enables you to draft a clear goal for the campaign.
In 1997, to comply with the new federal welfare reform bill, New York City expands its workfare program for welfare recipients. As we describe in “The Story of Community Voices Heard,” 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 full salary.

CVH organizers begin talking to thousands of WEP workers in New York City about what they are experiencing and what they want in order to improve their situations. Organizers go to welfare centers and people’s homes as well as parks and other sites. Organizers and leaders hold both one-on-one and group conversations with workers.

CVH learns that people want to work, but they want a paid job, not WEP. Most say they need education and training in order to obtain good jobs that will improve their lives and the lives of their families.

**Step Two: Draft a Goal.** The goal is what you ultimately want to achieve in the campaign. It is the big picture. You develop the goal by engaging in political education and analysis with members. You hold workshops and meetings, and talk with people individually. You get to the heart of the changes people ultimately want to see. A community power-building organization often sets a campaign goal that shifts the public debate on an issue in a more radical direction. The goal determines what policy or administrative demand you will make.

After identifying the issue, Community Voices Heard drafts the following campaign goal: to end WEP and replace it with paid jobs, education, and training. Other community-based organizations are focused on improving the WEP program or establishing nonprofit organizations as WEP placements. CVH’s goal of definitively ending WEP shifts the debate on the issue. There is a strong group of welfare recipients calling for an end to WEP because they believe the program does not work and is unjust. This position helps to move the debate farther away from the position that WEP is a positive program.
Step Three: Develop Demands. The demands are the specific changes in procedures, programs, and policies that people actually want to see happen. To develop the demands, the leadership team works with staff members to conduct library or Internet research and to survey other members and constituents to learn what programs or policies would achieve the goal. Sometimes groups will work with other technical assistance groups to develop a program. This leadership team then checks in with the larger membership about these demands to make sure they resonate and to get as much organizational buy-in as possible. The demand determines who your target is. The target is the person who can meet the demand and give you what you want.

The CVH leadership team, with help from the National Employment Law Project, drafts its own program, the New York City Transitional Jobs Program. It designs the program that members and constituents believe will alleviate their problem. The program will create paid twelve-month or “transitional” jobs with education and training. The jobs will be in city agencies and designated for welfare recipients as an alternative to WEP. The campaign demand is to create a transitional jobs program. After the leadership team develops the demand, it talks to thousands of workfare workers to make sure this demand is what people want to fight for.

Step Four: Research and Name a Target. The target is the lowest-level person who can give you what you want. It is always an individual, not an organization or group. You first conduct research to figure out who can meet your demand and who is most likely to do so. You examine factors including his or her position on issues like yours, his or her probable position on your proposal, what motivates him or her, and to whom he or she is accountable. To choose a target, you need to understand how much power you have to move specific individuals to meet your demands. Sometimes you identify secondary targets, who are people with power who you do have the ability to move. They can influence the target in ways you cannot. Once the target is clear, you create a landscape of the issue and assess the power dynamics surrounding the target.
The two people who could create a transitional jobs program in New York City are the mayor and the speaker of the City Council. The mayor can implement the transitional jobs program through his commissioner at the Human Resources Administration. The Council speaker can enact a city law requiring the city to implement the program. CVH searches each of the potential targets and determines it is unlikely the mayor will willingly support the program, and that the organization does not have enough power to force him to do so. The speaker of the Council does not necessarily support the program, but he is moveable. The organization has enough power, through its members and alliances, to influence him. CVH chooses the speaker as its best potential target.

Step Five: Create a Landscape of the Issue. The landscape is the fullest possible picture of the history and potential future of the issue. This picture gives you critical raw material for looking at the power dynamics that will play out in the campaign.

The CVH leadership team lists other organizations that are concerned about replacing WEP with paid jobs and training. It looks at their history of working on the issue. It sees that the labor movement is concerned about workfare but has no history of organizing WEP workers. The leadership team also looks at the opportunities that existed in federal and state programs. It sees that the federal government will be making more funding available for workforce issues.

Step Six: Conduct a Power Analysis. Power analysis is the process of laying out who else cares about the issue, who has a stake in it, and what their power is in relationship to it. Power analysis tells you what you need in your organization and through your alliances in order to move the target.

CVH knows that the Council speaker plans to run for mayor and needs the support of labor unions for his mayoral bid. When CVH looks at who else cares about the issue of replacing WEP with transitional jobs and training, it learns that several important labor unions are concerned. They see WEP as a threat to unionization and a way to cut wages. The unions could move the speaker. CVH has enough members and knowledge about workfare to get the unions’ attention.
Step Seven: Choose a Strategy. With the information gained so far, you look at your strategic options. Your strategy is your plan for moving the target. Will a target move because he or she responds to media attention or because you mobilize a large enough number of people who can hold that person accountable?

Community Voices Heard’s Transitional Jobs Campaign builds its supporting strategies around its core strategy of base-building.

CVH’s base-building focuses on large-scale membership recruitment of welfare workers into the organization. By building a strong and powerful base, CVH can show others—unions, elected officials, and the media—that it has the ability to harness the power of WEP workers and that in fact, it represents WEP workers. With leaders, members, and the ability to mobilize, CVH can engage in supporting strategies such as:

- **Legislative.** Get city council members to pass a bill creating jobs for welfare recipients. CVH will train members to do this, not send professionals to lobby for its bill.

- **Alliance.** WEP specifically hurts the city’s largest municipal union by displacing its members. CVH will use the union’s self-interest on the issue to engage it in a strategic alliance to support the demand for jobs.

- **Media.** Because of the council speaker’s mayoral aspirations, he wants good press. CVH uses a media strategy to publicize the problems with WEP and the solution—a jobs program—that CVH is fighting for.

Step Eight: Assess Organizational Power and Capacity. You explore if you have enough members and relationships with allies to move the target. Do you have money, staff, and other resources to conduct the campaign? Once you decide you have the capacity to use the strategies you want, you choose objectives.

The CVH power analysis shows that the speaker will move if he feels enough pressure from the constituents who vote him into office, from other members of the city council or from institutions that he will need to support him in his run for mayor. CVH’s organizational assessment shows it cannot build pressure in the speaker’s election district because it is a middle-class district with few welfare recipients. It does
not have the staff or financial resources to build its membership in enough council districts to influence the full council.

CVH does have the staff and money to focus on forming alliances with the unions to move the speaker. Given what the organization learns through its research about the time and capacity it will take to introduce a bill into the city council and get it passed, it assesses that it has the resources and the fundraising potential to carry out the campaign. CVH also has the ability to draw attention to the issue in the media and to move the chair of the City Council Committee on General Welfare to champion the rights of workfare workers and fight for the bill.

**Step Nine: Develop Objectives.** The objectives are the steps you need to take in order to get your target to meet your demands, based on your strategies. If you decide to implement a media strategy, then you work to get stories in the press. If you decide to implement an alliance strategy, then you build partnerships or a coalition.

Members have been involved in each step of developing the campaign so far. But the fullest possible group of members now understands, finalizes, and accepts the proposed campaign. Members start to talk about their message and what the organization will communicate about its issue, both to constituents and to specific public audiences.

The objectives in the Transitional Jobs Campaign are as follows:

- To build a base of one thousand WEP workers who can be mobilized to actions
- To develop a leadership of fifteen to twenty WEP worker leaders who can speak to allies, press, and elected officials
- To develop reports and studies that show the problems with the WEP program
- To form partnerships with the unions to move them to support the jobs program
- To get media coverage of the WEP program that will support workers’ demands for education, training, and paychecks
- To get a bill introduced into the city council to create a transitional jobs program.
Step Ten: State a Campaign Message. The message is the main point the organization will make about the issue throughout the course of the campaign.

The message for the Transitional Jobs Campaign is “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. It creates a permanent two-tier workforce in city agencies.” This message appeals to union and labor activists, workfare workers, and antipoverty organizations.

Step Eleven: Engage Full Membership and Leadership. Staff and members of the leadership team talk one-on-one about the campaign with other organization members. This process culminates in a large campaign planning meeting. The membership walks through all aspects of the proposed campaign plan. You hold the meeting to do more than have the group sign off on the leadership team’s recommendations. To continually train and empower members, incorporate real decision making into the process. You propose different scenarios, have places where people make decisions about actions and tactics, and have people analyze the pros and cons of the proposal.

In the campaign planning meeting, WEP workers review how the objectives will advance the strategy. What will get the bill introduced into a city council committee? Will CVH need to get everyone on the committee to write a letter to the committee chair? Will CVH need to write a bill with its partners?

Step Twelve: Choose Actions and Tactics. Actions are the events and activities in which you engage members and leaders in order to achieve the objectives. The tactics are the components that you use in your actions. Actions and tactics reflect the strategy. They are also things that members are willing to do and are excited about. For instance, if getting media coverage is critical to the campaign, will holding your own press conference get coverage or do you need to disrupt the target’s press conference? Do you need to conduct a research project and release the results? Have a militant march or a fun, creative protest? All of the above? In developing the campaign, you usually decide on general kinds of actions that you will plan in detail at specific points in the campaign.
Members identify what will move people on the issue of workfare and get press attention. They talk about how they cannot organize a WEP workers strike, but they can hold hearings and mobilize WEP workers to attend. They can do moving pickets and small-office takeovers. They discuss who needs to be at press conferences and how the organization will get them there.

Step Thirteen: Write a Plan. The campaign plan is a written map of the campaign, including a timeline. This helps make sure the organization keeps to its goals and objectives and doesn’t go off course. The organizer usually writes this document and then reviews it with members and leaders. By the end of campaign development you have a decisive, written plan of action. Members and leaders are fully engaged and ready to win.

CVH develops a timeline based on three major factors: how long it will take to build a base of WEP workers, the city council legislative process, and moving important allies. The legislative process is out of CVH’s control, so the plan is a living document that it will review and update. For example, when the local newspaper writes an op-ed piece critiquing the jobs bill and the speaker, CVH has to take actions it had not planned, namely, to respond to the op-ed and to shore up support for the bill and the speaker.

Step Fourteen: Conduct Actions, Organizing Meetings, and Other Events. Throughout campaign implementation, you engage in action. You hold regular organizing meetings to make sure the campaign is on track, to plan actions, and to assign tasks to specific staff and members. You prep and train leaders. The campaign provides countless opportunities to build your base, to engage and mobilize leaders and new members, and to show your power.

Community Voices Heard’s first action in the Transitional Jobs Campaign is to get five hundred WEP workers to sign pledge cards supporting the campaign. To secure the pledge cards, organizers identify members who can go out and talk
with WEP workers and ask them to sign the pledge. CVH develops a timeline and clear plan for getting the five hundred signatures, and trains the members in the skills they need to carry out their tasks effectively.

**Step Fifteen: Stick to the Plan.** The organizer uses the written campaign plan as a tool for managing the campaign. This includes updating the membership, facilitating evaluations of how the campaign is going, and enabling members to make informed decisions about how to move forward.

**Step Sixteen: Conclude the Campaign.** The campaign is over when you can determine that you have won, you have lost, or nothing else your organization does will make a difference. Sometimes you have a clear victory or defeat, but other times you assess that the campaign is just stuck. In such a case you need to develop a new campaign or move into a new phase of work on the current campaign.

**Step Seventeen: Evaluate the Campaign.** Campaign evaluation is the process of monitoring objectives, examining actions, and assessing the effectiveness of the campaign. You engage in evaluation as you implement the campaign and after it ends.

After the campaign ends, you determine whether or not the target met the organization’s demands. You review how well your organization performed in the campaign and why. You assess if you met your campaign goal and your organizational power-building goals.

At the conclusion of the Transitional Jobs Campaign, the council voted CVH’s bill into law, but the mayor vetoed the bill. The council overrode the veto, but the mayor still refused to implement it. Staff, member, and leaders evaluated that CVH successfully won a bill to employ welfare recipients. It built its own power by recruiting, mobilizing, and developing hundreds of new members and by building relationships with major local unions. CVH received a lot of press. Dozens of organizations and people with power now knew about the organization.

CVH won, but it did not meet the goal of creating paid jobs for people on welfare. At this point, the leaders declared victory and began a new campaign to force the city to fully implement a transitional jobs program.

Ultimately, the various transitional jobs campaigns were successful. In 2000, New York City created 7,500 transitional jobs for former welfare recipients.