

External Campaign Summary Guide

Campaign Goal	We encourage you to use the SMARTIE framework to determine if your goal is Specific, Measurable, Achievable, Relevant, Timely, Inclusive, and Equity-Centered.
Campaign Phase	Phase Description
Establishment of Organizing Team	Campaign Lead creates a team that reflects the workers you are targeting for the campaign. This team agrees to meet regularly and is accountable for campaign success.
Planning	Internal preparation activities of campaign planning team. Examples include strategic campaign planning sessions, worksite mapping, obtaining worker lists, and conducting a power analysis.
Internal Organizing	Campaign team identifies, recruits, and trains worksite leaders to build and lead worksite action teams. This may actually be the longest phase of your campaign if you are just beginning. For more details on internal organizing to prepare for an external campaign, see “Internal Organizing Guide” below.
Kick-off	Campaign Launch. An event that announces the campaign publicly and engages members and other supporters in ways to get involved. This also includes recruiting, training, and otherwise preparing organizing and worksite action teams.
Low Risk/ Low Pressure Tactics	Tactics are a series of actions that build support for your campaign and increase pressure on your target towards your goal. Low risk tactics have a low risk of disciplinary action or retaliation. They also create very little pressure on your target. They are good for identifying and building support early in your campaign. Some examples include red shirt days and online petitions.
Moderate Risk/ Moderate Pressure Tactics	Tactics that turn up the heat on your target and test worker commitment to participation in higher-risk tactics (if necessary). Some examples include turnout with organized speakers at public meetings, public rallies, and walk-ins. These tactics should be covered by the media to increase public attention to the issue and pressure on your targets.
High Risk/ High Pressure Tactics	Tactics that will force a crisis for your target. Some examples include strikes, work stoppages, or acts of civil disobedience. You may or may not use these tactics in your campaign, but a good assessment of your power as a union is your ability to successfully execute higher pressure tactics if necessary (being “strike ready”). Because of the risk you and your coworkers face in using these tactics, they should not be undertaken without completing a strong internal organizing campaign first and conducting multiple structure tests to ensure a supermajority are committed to participating.

Internal Campaign Summary Guide

Below are some suggestions of the phases of an internal capacity-building campaign. These phases are commonly used to prepare for an external campaign. You may use these phases in your summary or add your own.

Campaign Goal	We encourage you to use the SMARTIE framework to determine if your goal is Specific, Measurable, Achievable, Relevant, Timely, Inclusive, and Equity-Centered. For example, if you want to build your membership, list a numeric goal for the number of members you want to recruit by a specific deadline. If applicable, describe specific groups of potential members you want to recruit, such as job classifications, worksites, or demographics.
Campaign Phase	Phase Description
Establishment of Organizing Team	Campaign Lead creates a team that reflects the workers you are targeting for the campaign. This team agrees to meet regularly and is accountable for campaign success.
Campaign Planning	Organizing team works with the Campaign Coach to create a campaign plan with a clearly defined goal. This includes completing an assessment of your union and could also include a power analysis.
Lists, Mapping and Leadership Identification	Examples include obtaining employee lists, mapping worksites to identify membership potential, new leaders, and worker networks. May also include community mapping and identification of coalition partners if the campaign is focused on building community support.
Worksite Structure Building and Training	Examples include identifying and training new building reps, building worksite action teams, rep training, and contract action teams.
Worker/Community Engagement in Issue Identification	Examples include conducting surveys, canvassing, 10-minute building rep meetings, focus groups, and town halls, and building membership support for external campaigns through organizing conversations and small group meetings.
Development of Communications Infrastructure	Examples may include creating or updating a website, social media page, newsletter, creating online communities via platforms like WhatsApp, Facebook, Reddit, or Discord and forming teams to support engagement. It may also include working with your state affiliate to access subscriptions to organizing apps such as Hustle, VAN, and Mobile Leader, or running structure tests on member-to-member communication systems.
Development of Data Tracking System	Examples may include implementing use of Mobile Leader, Excel, or paper wall charts to track worker participation and campaign progress.

External Campaign Summary Worksheet

Please list your goal, and briefly describe the activities planned for each phase of the campaign. Please also include dates. The dates can be approximate. When complete, email this form to Amanda Kail at akail@nea.org.

Campaign Goal		
Campaign Phase	Summary of Activities Planned	Dates (Can be approximate)
Establishment of Organizing Team		
Campaign Planning		
Internal Organizing		
Kick-off		
Escalating Tactics		
Win		

Internal Campaign Summary Worksheet

Please list your goal and briefly describe what you are planning to do. Please use phase descriptions (see internal campaign summary guide above) and include dates. Establishing a team and creating a plan are required phases. The dates can be approximate. When complete, email this form to Amanda Kail at akail@nea.org.

Campaign Goal		
Campaign Phase	Activities Planned	Dates (Can be approximate)
Establishment of Organizing Team		
Campaign Planning		