



Campaign Planning Coaching Guide

Indicators
Processes
Interventions
Questions



Campaign Plan Overview Checklist for Coaches

Component of a Campaign Cycle	Evident in Your Work with the Team Lead
Centering Equity (process to ensure this throughout your campaign?)	
Team Formation (set up the team for success with a shared purpose, commitments, roles?)	
Problem (big issue, no clear solution)	
Issue (personal, manageable, specific to the problem needing to be solved with a tangible solution)	
Demand (what do we want in order to solve the issue)	
Target (has the decision making or resources to solve your problem)	
Allies (supporters on this issue)	
Opposition (do not support you on this issue)	
Metrics (inform is you are winning along the way)	

COACHING TO CENTER EQUITY (Iterative Analysis)

As a coach, the questions in this worksheet can direct your support on this part of the campaign cycle.

Race, class, and gender dynamics, disparities, and divisions permeate our society, communities, schools, and classrooms. Systemic oppression is so deeply rooted in our history, culture, and institutions that there is no escaping it. Visible or not, the impacts are ever-present. Race, class, and gender justice is the systematic fair treatment of all people resulting in equitable opportunities and outcomes for all. Justice, or equity goes beyond being against the systematic use of oppressions like misogyny, racism, and classism. It is not just the absence of discrimination and inequities, but also the presence of deliberate systems and supports to achieve and sustain equity through proactive and preventative measures.

What does it mean to center equity in your campaign?

How are you planning to engage in a systems analysis of a racial issue and develop solutions or to test if the campaign demands center race, class, and gender justice?

Problems: What inequities are you noticing or experiencing? What are the impacts on different groups? Who benefits most and who is hurt most?

Causes: What institutions, policies, or practices are causing or contributing to the inequities? What social norms, popular myths, or cultural biases may be contributing?

History: How did things get this way and are things worsening or improving?

Solutions: What solutions could address the root causes and eliminate the inequities? How would different racial groups be impacted by the proposed solutions?

Strategies: What strategies and actions could be used to advance the solutions?

Leadership: Who are the stakeholders most affected by the inequities? Are they involved in naming the issues and solutions? What kinds of active leadership roles could they take to advance the proposed solution?

Additional Equity Tool Questions:

Who is most directly impacted?

Who has been left out?

How can they be directly engaged?

How do our demands center race, class, and gender justice?

Coaching Leadership Team Development

A Team Lead should be able to answer the following questions:

1. Who are the key people on the team and their roles?
2. What is their shared purpose?
3. What are the community agreements that they are committed to?

Three measures of an effective team to help Team Leads understand are:

1. **OUTPUT** : The success of the team in taking the action required to achieve its valued goals – winning the game, winning the campaign, putting on the play, etc.
2. **CAPACITY** : Over time the team is learning how to work more effectively as a team, and developing more leadership.
3. **LEADERSHIP DEVELOPMENT**: Individuals who participate on the team learn and grow as a result of their participation.

Three conditions that a Team Lead needs to use to define a team:

1. **The team is bounded.** The team lead can name the people on it; they don't come and go, whoever shows up doesn't have the automatic right to participate in the team. Most highly effective teams have no more than 4 – 8 members.
2. **The team is stable.** It meets regularly. It's not a different, random group of people every time. Membership of the team remains constant long enough that the team learns to work together better and better; each member is fully committed to be on the team and commits consistent time and effort to it.
3. **The team is interdependent.** As on an athletic team, a string quartet, or an airplane cabin crew, the contribution that each person makes is critical to the success of the whole. Team members have a vital interest in each other's success, looking for ways to offer support.

Three steps for a Team Lead to use in launching an effective team:

1. **The team has a shared – and engaging – purpose.** You are clear on what you have created your team to do (purpose), who you will be doing it with (constituency), and what kinds of activities your team will participate in. The work you have to do is readily understood, it's challenging, it matters and you know why it matters. Team members need to be able to articulate for themselves and others this "purpose".
2. **The Team has created clear interdependent roles.** Each team member must have their own responsibility, their own "chunk" of the work, on which the success of the whole depends. No one is carrying out activity in a silo that's secretive to others. A good team will have a diversity of identities, experiences and opinions, ensuring that everyone is bringing the most possible to the table.
3. **Your team has explicit ground rules.** Your team sets clear expectations for how to govern itself in your work together. How will you manage meetings, regular communication, decisions, and commitments? And, most importantly, how will you correct ground-rule violations so they remain real ground rules? Teams with explicit operating rules are more likely to achieve their goals. Some team norms are operational, such as how often will we meet? How will we share and store documents? Communicate with others outside the team? etc. Others address expectations for member interaction with each other. Initial norms guide your team in its early stages as members learn how to work together. Norms can be refined through regular group review of how well the team is doing.

Coaching Team Leads through ID AND ISSUE CUTTING

What is the problem(s) we are trying to address?

What is a concrete solution(s) to one part of this problem? This is where we find our issue.

Is the issue.. (See Issue Analysis Tools)

Widely felt and/or deeply felt?

- Winnable?
- Aligned with our values?

Does the issue..

- Build the union and builds leaders?

DEMAND

What is the demand to the target(s)? The demand should name a clear target, call on the target to take a specific action, and demonstrate the harm or impact. There may be a primary target and a secondary target.

Coaching for Assessment of Organizational Capacity and Resources

Examine what resources we have to build and use power. Power is organized people and organized money (and resources).

People

Who are our organized people?

- How many current leaders and active members do we have?
- Who are potential new leaders and active members, and how can we recruit them?
- Who are our allies? How many leaders and active members do they have? What relationship do they have with the target(s)?

Expertise

Key, specialized knowledge that is used to support the change you want to see. Where is it, how do you get it, how do you communicate it, how do you use it?

Durable Resources

Does not go away (meeting space, research)

Exhaustible Resources

One time use, need to be replenished, need a sustainability plan (money, time)

Coaching Through the Primary Power Analysis of the Issue

Issue Background

What is the history and current status of the issue?

What are the competing agendas or positions on the issue?

What are the narratives surrounding the issue?

Who are allies on the issue? Who are opponents on the issue?

System Landscape

What are the decision making processes on this issue?

Who is involved in each step of the decision making process?

Coaching of Targets and the Power Analysis of Targets

Primary Target Name:

- Based on the Primary Power Analysis who is the primary target? Who can give us what we want?
- Be specific. A target has a name, a face and an address.

Primary Target Power Analysis

Position • What is the target's position on the issue? • Why is the target taking this position? • What is the target's history on the issue?	Self-Interest • What does the target care about? • What motivates the target to act? • What are the target's goals?
Relationships • What relationship do we have with the target? • Who influences the target? Do we (or our allies) have a relationship with any of them? • Who are the target's allies and opponents? • To whom is the target accountable? Is the target elected or appointed? • Who are the target's base of support?	Power • What power does the target have and where does their power derive from? • How do they organize people? • How do they organize money and resources?

Secondary Target Name (if there is one) :

- Be specific. A target has a name and a face. A secondary target can MOVE the primary target.

Secondary Target Power Analysis (if applicable)

Position • What is the target's position on the issue? • Why is the target taking this position? • What is the target's history on the issue?	Self-Interest • What does the target care about? • What motivates the target to act? • What are the target's goals?
Relationships • What relationship do we have with the target? • Who influences the target? Do we (or our allies) have a relationship with any of them? • Who are the target's allies and opponents? • To whom is the target accountable? Is the target elected or appointed? • Who are the target's base of support?	Power • What power does the target have and where does their power derive from? • How do they organize people? • How do they organize money and resources?

Coaching the Process of the SPECTRUM OF ALLIES POWER ANALYSIS (WHO CAN WE MOVE?)

1. Active Allies: Your Constituency

You believe you can **already** count on them to help you.

If your target falls in this area of the spectrum – your tactics will need to find ways to engage your allies even more actively in working with you toward your goal.

2. Passive Allies: Support

You think they have the same interest, investment or need to solve the problem as you do, and may be close to agreeing with you about your vision, but perhaps may not be able or willing to actively or overtly support you.

If your target falls in this area of the spectrum - your tactics will need to help move them to the “*active ally*” position; increasing their interest and willingness to be active.

3. Neutral: Not Yet – With you or Against you

These are people, organizations, institutions that may not know about the problem; may not know about you and your work; have no particular investment in the problem.

If your target falls in this area of the spectrum – your tactics will need to find ways to inform or educate them about the problem and your position in order to move them to a “*passive ally*” position. Examine your tactics to be sure you will not move them toward your opponent’s position.

4. Passive Opponents:

These are people, organizations, institutions that you think have some interests that would be opposed to your vision; they may have relationships with people who are actively opposed to you.

If your target falls in this area of the spectrum – your tactics will need to create doubt about their position, raise fears that their position may be “costly” to them in some way. You want your tactics to move them to a “neutral” position and NOT to an active opponent position.

5. Active Opponents:

These are people, organizations, institutions that have a big investment in opposing your position (related to power, position, finances, relationships, etc.).

If your target is located in this area of the spectrum – your tactic goal would need to put them into a great dilemma, that any action they would take against you would be very “costly” to them. Your tactic goal would be to move them into a “*passive opponent*” position.

New Tactics in Human Rights is a program of **The Center for Victims of Torture**

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Coaching through a COMMUNICATION PLAN – Based on the spectrum of allies analysis, how do you strategically communicate with the people in each of these groups?

Constituency- Your people who care about this issue and may take action to work towards the win		
What is your plan for being in contact with as many of these folks as often as possible? How will you know they care about this issue?		
Support- Individuals and organizations who support the win but may not be a part of the actions	Neutral - Individuals and organizations who are not yet working towards similar wins or against you.	Passive Opposition and Opposition - Individuals and organizations who are against the win you are seeking to achieve
What is your plan for being in contact with these folks? How will you know they support this issue?	What is your plan for being in contact with these folks? How will you know if and when they move towards you or away from you?	What is your plan for being in contact with these folks? How will you know that they oppose this issue?
Individuals and Organizations you identified that you may not know yet if they support, oppose, or compete with you.		
What is your plan for being in contact with these folks?		

Coaching through a Targeted Messaging Strategy

Focusing only on the opposition leads to becoming disheartened or cynical, which means you ignore potential allies and support. Focusing only on how to convince the important power-holder who is against you leads to ignoring all of the potential support you could build that could overpower her opposition.

Focusing only on active allies leads to being an isolated interest-group, which also means you ignore potential allies and support. Always doing events with the same group of individuals or organizations isolates you from creative, powerful community-building that can arise from new alliances and partnerships.

Generalizing about whole groups of people risks misunderstanding the nuances of communities. If you think about "students" as an entire group, you ignore the huge number of different groups & organizations (potential allies!) that exist in a student community.

DO focus on passive allies. These are folks who know or care about what you're up to, but aren't doing anything about it! Give them a chance to participate and build power with you. Good news, in most social change campaigns, it is not necessary to win the **opponent** to your point of view, even if the powerholders are the opponent. It is only necessary to move some or all of the pie wedges one step in your direction. If we shift each wedge one step, we are likely to win, even if the hardliners on the opponent's side don't budge.

Who is the audience for the campaign messaging? What kind of message will reach them? What are their values? Think about 5 sectors you communicate with – Allies, Passive Allies, Neutral, Passive Opponents, Opponents.

Allies

Passive Allies

Neutral

Passive Opponents

Opponents

Coaching Content for Strategy, Theory of Change, Timelines and Tactics

When you structured your leadership team you decided on a shared purpose: your overall mission, your constituency, and the kind of activities you'll undertake. The challenge now is to strategize just HOW you will carry out that purpose.

The first step is to identify the people whom you are organizing, your constituency, and map out the other relevant actors. The second step is to come up with the goal of your organizing effort: what exactly is the problem is you hope to solve, how would the world look different if it were solved, why hasn't that problem been solved, what would it take to solve it, and toward what clear, observable, and motivational goal could members of your constituency focus their work to get started, build their capacity, and develop their leadership? The third step is to figure out how your constituency could turn resources it has into the power it needs to achieve that goal: what tactics could it use, how could they target their efforts, and how would they time their campaign.

Strategy is "turning resources you have into the power you need to get what you want – your goal.

- Strategic Goal (what you want): The goal is a clear, measurable point that allows you to know if you've won or lost, and that meets the challenge your constituency faces.
- Power (what you need): tactics through which you can turn your resources into the capacity you need to achieve your goal.
- Resources (what your constituency has): time, money, skills, relationships, etc.

How Strategy Works

Strategy is Motivated: What's the problem?

We are natural strategists. We conceive purposes, encounter obstacles in achieving those purposes, and we figure out how to overcome those obstacles. But because we are also creatures of habit, we only strategize when we have to: when we have a problem, something goes wrong, something forces a change in our plans. That's when we pay attention, take a look around, and decide we have to do something differently. Just as our emotional understanding inhabits the stories we tell, our cognitive understanding inhabits the strategy we devise.

Strategy is Creative: What can we do about the problem?

Strategy requires developing an understanding of why the problem hasn't been solved, as well as a theory of how to solve it, a theory of change. Moreover because those who resist change often have access to more resources, those who seek change often have to be more resourceful. We have to use this resourcefulness to create the capacity – the power – to get the problem solved. It's not so much about getting "more" resources as it is about using one's resources smartly and creatively.

Strategy is a Verb: How can we adapt as we learn to solve the problem?

The real action in strategy is, as Alinsky put it, in the reaction – by other actors, the opposition, and the challenges and opportunities that emerge along the way. What makes it "strategy" and not "reaction" is the mindfulness we can bring to bear on our choices relative to what we want to achieve, like a potter interacting with the clay on the wheel, as Mintzberg describes it.

Although our goal may remain constant, strategizing requires ongoing adaptation of current action to new information. Something worked better than we expected. Something did not work that we had expected. Things change. Some people oppose us so we have to respond. Launching a campaign only begins the work of strategizing. This is one reason your leadership team should include a full diversity of the skills, access to information and interests needed to achieve your goal. We call this "strategic capacity." So strategy is not a single event, but an ongoing process continuing throughout the life of a project. We plan, we act, we evaluate the results of our action, we plan some more, we act further, evaluate further, etc. We strategize, as we implement, not prior to it.

Strategy is Situated: How can I connect the view in the valley with the view from the mountains?

Strategy unfolds within a specific context, the particularities of which really matter. One of the most challenging aspects of strategizing is that it requires both a mastery of the details of the “arena” in which it is enacted and the ability to go up to the top of the mountain and get a view of the whole. The power of imaginative strategizing can only be realized when rooted within an understanding of the trees AND the forest. One way to create the “arena of action” is by mapping the “actors” that populate that arena.

Key Strategic Questions for Coaches and Team Leads to ask:

1. Who are my PEOPLE?
2. What is the CHANGE they need?
3. How can they turn their RESOURCES into the POWER they need?
4. What is their STRATEGIC GOAL?
5. Which TACTICS can they use?
6. What is their TIMELINE?

Step 1: Who are my people? (Similar to the Spectrum of Allies Analysis)

Constituency

Constituents are people who have a need to organize, who can contribute leadership, can commit resources, and can become a new source of power. It makes a big difference whether we think of people with whom we work as constituents, clients, or customers. Constituents (from the Latin for “stand together”) associate on behalf of common interests, commit resources to acting on those interests, and have a voice in deciding how to act. Clients (from the Latin for “one who leans on another”) have an interest in services others provide, do not contribute resources to a common effort, nor do they have a voice in decisions. Customers (a term derived from trade) have an interest in goods or services that a seller can provide in exchange for resources in which he or she has an interest. The organizers job is to turn a community – people who share common values or interests – into a constituency – people who can act on behalf of those values or interests.

Leadership

Although your constituency is the focus of your work, your goal as an organizer is to draw upon leadership from within that constituency – the people with whom you work to organize everyone else. Their work, like your own, is to “accept responsibility for enabling others to achieve purpose in the face of uncertainty.” They facilitate the work members of their constituency must do to achieve their shared goals, represent their constituency to others, and are accountable to their constituency. Your work with these leaders is to enable them to learn the five organizing practices you are learning: relationship building, storytelling, structuring, strategizing, and action. By developing their leadership you, as an organizer, not only can get to “get to scale.” You are also creating new capacity for action – power – within your constituency. For the purpose of this exercise your group here is your leadership team.

Opposition

In pursuing their interests, constituents may find themselves to be in conflict with interests of other individuals or organizations. An employers’ interest in maximizing profit, for example, may conflict with an employees’ interest in earning a comfortable wage. A tobacco company’s interests may conflict not only with those of anti-smoking groups, but of the public in general. A street gang’s interests may conflict with those of a church youth group. The interests of a Republican Congressional candidate conflict with those of the Democratic candidate in the same district. At times, however, opposition may not be immediately obvious, emerging clearly only in the course of a campaign.

Supporters

People whose interests are not directly or obviously affected may find it to be in their interest to back an organization’s work financially, politically, voluntarily, etc. Although they may not be part of the constituency, they may sit on

governing boards. For example, Church organizations and foundations provided a great deal of support for the civil rights movement.

Competitors and Collaborators

These are individuals or organizations with which we may share some interests, but not others. They may target the same constituency, the same sources of support, or face the same opposition. Two unions trying to organize the same workforce may compete or collaborate. Two community groups trying to serve the same constituency may compete or collaborate in their fundraising.

Other Actors

These are individuals and actors who may have a great deal of relevance to the problem at hand, but could contribute to solving it, or making it harder to solve, in many different ways. This includes the media, the courts, the general public, for example. Mapping the actors can help us identify those who may be responsible for the problem our constituency faces, where they can find allies, and who else has an interest in the situation.

Step 2: What is the change they need?

We then must decide on the change we want to see by first asking what exactly the problem is, how the world might look if it were solved, why it hasn't been solved, and what it would take to solve it.

What's the problem?

What exactly is the problem, in real terms, in terms of people's every day life?

Brainstorm your teams understanding of what the problem is with as much specificity as possible. Dig into it and go beyond the accepted answers. \

How would the world look different if the problem were solved?

What happens if we fail to act? What is the "nightmare" that awaits – or may already be here? On the other hand, what could the world look like if we do act? What's our realistic "dream", a possibility that could become reality?

Why hasn't the problem been solved?

If the world would look so much better for our people if the problem were solved, why hasn't it been solved? Has no one thought of it? Did people try, but found they were meeting too much resistance? Did people not know how? Did they lack information? Did they lack technology? Would solving the problem threaten interests powerful enough to derail the attempts?

What would it take to solve the problem?

More information? Greater awareness? New tools? Better organization? Better communication? More power? What changes by what people would be required for the problem to be solved?

What is the change they need?

What change could you focus on achieving that would make a real difference in the lives of your constituency. It is more focused than a shared purpose but broader than a strategic goal.

Step 3: How can they turn their resources into the power they need: Theory of Change?

Figuring out how to achieve a strategic goal – or even what goal is worth trying to achieve – requires developing a "theory of change". We all make assumptions about how change happens. Some people think that sharing information widely enough (or "raise awareness") about a problem will change things. Others contend that if we just get all the "stakeholders" into the same room and talk with each other we'll discover that we have more in common than that separates us and that will solve the problem. Still others think we just need to be smarter about figuring out the solution.

Community organizers focus on the community, their constituency, because they believe that unless the community itself develops its own capacity to solve the problem, it won't remain solved. Another word for "capacity" is "power" or, as Dr. King defined it "the ability to achieve purpose." Power grows out of the influence that we can have on each other. If your interest in my resources is greater than my interest in your resources, I get some power over you – so I can use your resources for my purposes. On the other hand, if we have an equal interest in each other's resources we can collaborate to create more power with each other to bring more capacity to bear on achieving our purposes than we can alone. So the question is how to proactively organize our resources to shift the power enough to win the change we want, building our capacity to win more over time? Since power is a kind of relationship, tracking it down requires asking four questions:

1. What do WE want?
2. Who has the RESOURCES to create that change?
3. What do THEY want?
4. What resources do WE have that THEY want or need?

If it turns out that we have the resources we need, but just need to use them more collaboratively, then it's a "power with" dynamic. If it turns out that the resources we need have to come from somewhere else, then it's a "power over" dynamic. So the question is how our constituency can use its resources in ways that will create the capacity it needs to achieve the goal. IF we do this, THEN that will likely happen. **Coaches and Leads will test this out with a series of "If-Then" sentences. Once your satisfied you are ready to articulate your organizing sentence:**

"We are organizing WHO to achieve WHAT (goal) by HOW (theory of change) to achieve what CHANGE"

Step 4: What is their strategic goal?

How might we set a goal that—while it may not solve the whole problem identified in Step Two—could get us well on our way by making a real change, building our capacity, motivating others, and creating a foundation for what comes next? No one campaign can solve everything, but unless we can focus our efforts on a clear outcome, we risk wasting precious resources in ways that won't move us towards our ultimate goal. Here are some criteria to consider for a motivational, strategic organizing campaign goal—one that builds leadership and power:

1. **Specific Focus:** It's concrete, measurable, and meaningful. If your constituents win, achieving this goal will result in visible, significant change in their daily lives. This is the difference between "our goal is to win reproductive justice" and "our goal is to ensure that every student has access to free, round the clock contraception on our campus." We make progress on the first one by turning it into something that can be achieved by moving specific decision makers to reallocate resources in specific ways. Your constituency will need this focus to move into action.
2. **Motivational:** It has the makings of a good story. The goal is rooted in values important to your constituency, requires taking on a real challenge, and stretches your resources: It isn't something you can win tomorrow. Think David and Goliath.
3. **Leverage:** It makes the most of your constituency's strengths, experience and resources, but is outside the strengths, experience and resources of your opponent.
4. **Builds Capacity:** It requires developing leadership who can organize their own constituency to enhance the power of your organization. It offers multiple local targets or points of entry and organization.
5. **Contagious:** it could be emulated by others pursuing similar goals.

Step 5: What tactics can they use?

Remember what a “tactic” is? It’s the activity that makes your strategy real. Strategy without tactics is just a bunch of ideas. Tactics without strategy wastes resources. So the art of organizing is in the dynamic relationship between strategy and tactics, using the strategy to inform the tactics, and learning from the tactics to adapt strategy.

Your campaign will get into trouble if you use a tactic just because you happen to be familiar with it – but haven’t figured out how that tactic can actually help you achieve your goal. Similarly, if you spend all your time strategizing, without investing the time, effort, and skill to learn how to use the tactics you need skillfully, you waste your time. Strategy is a way of hypothesizing: if I do this (tactic), then this (goal) may happen. And like any hypothesis the proof is in the testing of it.

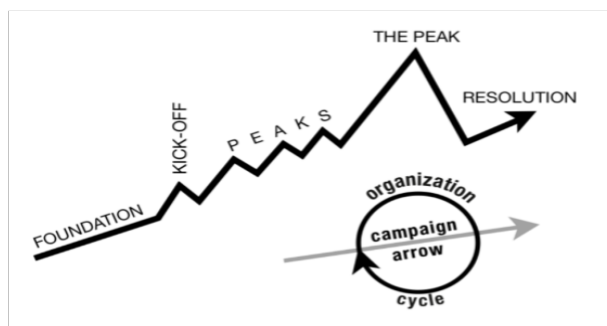
Criteria for good tactics include:

- Strategic: it makes good use of your constituency’s resources to make concrete, measurable progress toward campaign goals. Saul Alinsky and Gene Sharp are excellent sources of tactical ideas.
- Strengthens your organization: it improves the capacity of your people to work together.
- Supports leadership development: It develops new skills, new understanding, and, most importantly, new leadership.

There are two ways to operate in the world—you can be reactive, as many organizations are, or you can be proactive. In order to be proactive you have to set your own campaign goals and timeline, organizing your tactics so that they build capacity and momentum over time.

Step 6: What is their timeline?

The timing of a campaign is structured as an unfolding narrative or story. It begins with a foundation period (prologue), starts crisply with a kick-off (curtain goes up), builds slowly to successive peaks (act one, act two), culminates in a final peak determining the outcome (denouement), and is resolved as we celebrate the outcome (epilogue). Our efforts generate momentum not mysteriously, but as a snowball. As we accomplish each objective we generate new resources that can be applied to achieve the subsequent greater objective. Our motivation grows as each small success persuades us that the subsequent success is achievable – and our commitment grows.



A campaign timeline has clear phases, with a peak at the end of each phase—a threshold moment when we have succeeded in creating a new capacity we can now put to work to achieving our next peak. For example, one phase might be a 2-month fundraising and house meeting campaign that ends in a campaign kickoff meeting or rally. Another phase might be 2 months of door-to-door contact with constituents affected by the problem you’re trying to solve, collecting a target number of petitions to deliver with a march on the Mayor at City Hall at the end, another peak. But within each phase there is a predictable cycle, which in a sense is a mini-campaign in itself: training, launch, action, more action, peak, evaluation. When organizing a peak, keep in mind a specific outcome that you want the peak to generate. For example, if you want to sign-up 50 new volunteers at an event or launch three neighborhood teams, how do you make that happen?

After each peak, your staff, volunteers and members need time to rest, learn, re-train and plan for the next phase. Often organizations say, “We don’t have time for that!” Campaigns that don’t take time to reflect, adjust and re-train end up burning through their human resources and becoming more and more reactionary over time.

Coaching on developing a STRATEGY AND TACTICS

Brainstorm tactics that will put pressure on the target(s).

Name how each tactic would disrupt the target(s)'s self-interest, relationships, or power.

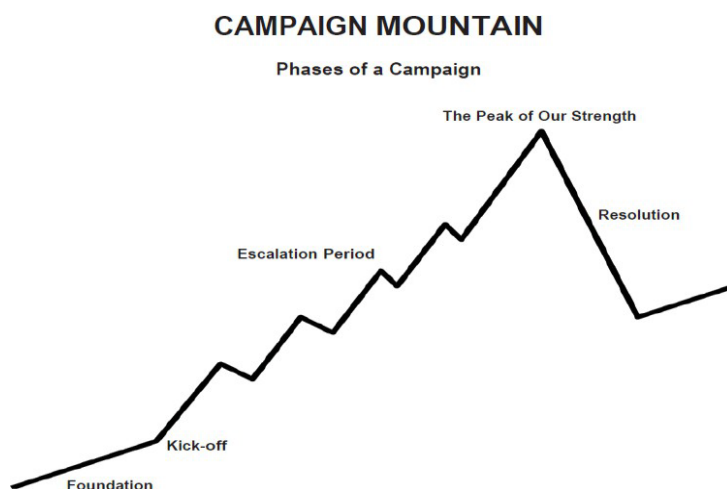
List the tactics above which meet the criteria below:

- Put pressure on the target (push them out of their comfort zone)
- Build our power (develop our leaders and bring more people into the campaign)
- Are strategic (make good use of our resources to put pressure on target)

Number the tactics above in order of escalation:

Think about how much participation, resources, and risk each tactic requires, as well as how much pressure it will put on the target(s).

Keep reviewing this list throughout the campaign. Remember that each implemented tactic gives us more information about the readiness of our members for the next step and how much pressure the target(s) can sustain. Use this information to inform the next tactic.



COMPRESSION POINTS

What are the key dates to plan the campaign around?

This can be either externally set dates (board meetings, breaks, etc) or internally set dates (deadlines we give to the target).

BUILDING POWER & DEVELOPING LEADERS

In what ways will we activate more members and build power throughout this campaign?

In what ways will we develop leaders throughout this campaign?

Coaching on BUILDING POWER & DEVELOPING LEADERS – Do the Math

Goals vs. Metrics

GOALS measure consequential outcomes—the ultimate work that needs to get done to win your campaign. The goal you give a staff person is what you're asking that person **TO ACHIEVE** over a long period of their work.

METRICS track the activities that staff and volunteers engage in day to day. Metrics track what you are asking volunteers **TO DO**. Metrics are not an end in themselves, but a way to help you, your volunteers decide routinely which activities are best helping you meet your overall campaign goals so you can re-strategize over time.

What is your goal? How many people on what date will it take to win that?

Example:

Goal is to get a question placed on the ballot. The metric is 5000 paper petitions signed 4 months from now.

Universe of Potential Actors: 60 Worksites each with 100 Workers

Team Planning: 10 Campaign Team Lead Members create plan (30 Days) (10 People)

Foundation: Each Campaign Team Lead Works with 5 Sites to recruit and train a Campaign Action Lead. (1 Team Lead to 5 Worksite Leads - 50 People)

Structure Building: Those 50 Campaign Action Leads recruit 5 People and train them. (50 Worksite Leads to 5 Building Team Members - 250 People)

Second Peak: Expansion Communication and Kick-off (30 Days)

Each Building team holds one 10 Minute Meeting recruiting 25 people in attendance. (each Campaign Action Team Member is responsible for recruiting 5 people to the meeting) (250 Building Team Members to 5 Supporters - 1250 People)

Third Peak: Resolution - Asking for Signatures (30 Days)

Each of the 25 who attended each of the 50 building meetings are responsible for collecting at least 5 petition signatures. (1250 Supporters to 5 Supporters - 6250 Signatures and People)

What is your math?

Coaching the Development of an Outline for the Campaign Plan

- What foundation do you need to build before implementing your campaign (leadership team, initial planning, recruit leaders, gather resources, etc.)? How many people? Date?
- What will you do to kick-off your campaign and gear up for the first tactic? How many people? Date?
- What tactics will you take to reach the win? How many people? Date?
- Are there any natural compression points (dates, events, deadlines) that tactics should align with?

Foundation		
Kick-off		
Tactic 1		
Tactic 2		
Tactic 3		
Tactic 4		
Tactic 5		
Win/Demand		

Kick-Off	
Kick-Off Goal	
# Leaders	
# Participants	
Date(s)	
Location(s)	
Recruitment and Communication Plan	
Resources and Supplies	
Measurable Data (Qualitative and Quantitative)	

Debrief (Complete after action, Plus, Delta, Key Learning)

Tactic 1 (Complete for each tactic)	
Tactical Goal	
#Leaders	
#Participants	
Date(s)	
Location(s)	
Recruitment and Communication Plan	
Resources and Supplies	
Measurable Data (Qualitative and Quantitative)	

Debrief (Complete after action, Plus, Delta, Key Learning for Next Action)