

Entry Thinking and Chart



- › What do you need answered before you leave today?

Campaign Academy: Leaders and Structures for Winning Campaigns

March 1st, 2026





Campaign Academy

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Caucus Social Contract

Be aware of how you are showing up in the room – side conversations, and same folks talking

Facilitators will try to give a one-minute warning before cutting off a conversation to move back to content



TODAY'S AGENDA AND OUTCOMES



- 7:30-8:30 Breakfast
- 8:30-11:00 Theory of Change, Escalation
- 11:00-12:00 Campaign Planning
- 12:00-12:30 Team Sharing
- 12:30-1:00 Ending it Right
- 1:00 Lunch on Your Own and Adjourn

Participants will understand the Basics of the Campaign Lab, the Structures for Support, and the stages of a Campaign Cycle

Feedback on Feedback

52 Responses!!!

Range 4.9 to 4.87 Highest to lowest – Facilitators, Materials, Content, Pacing.

Themes -

Remaining a cohort that is connected and continuing to learn

Too fast, not enough time to talk and work

Structure and content are great

Side bars and rotation of speakers

Your words

I really like the way this training is organized and put together. I have learned so much from this training to put into action

I am so excited to apply these ideas to our campaign! Getting into the details has made me realize that breaking this whole process down makes it a whole lot easier. Thank you!

More movement breaks, particularly after lunch. I've really enjoyed the training and have learned a great deal. I have also discovered how much I've already been doing without realizing the importance of the work. I have some great ideas to take home and share with my organizing team. Thank you!

I have an ACTUAL LIST of actionable items to push our campaign forward. I forgot to take a break this afternoon because I was so locked into our issue campaign strategy session.
THANK YOU!



Theory of Change

Zac



What do you think
a Theory of
Change is?

How Teams Climb the Mountain

Theory of Change -A clear theory of change is essential to developing a shared strategy. It helps organizers identify the power they have, the change they seek, and the path to get there.

Strategy Drives Tactics – Long-term strategic goals inform short-term actionable tactics for campaign success.

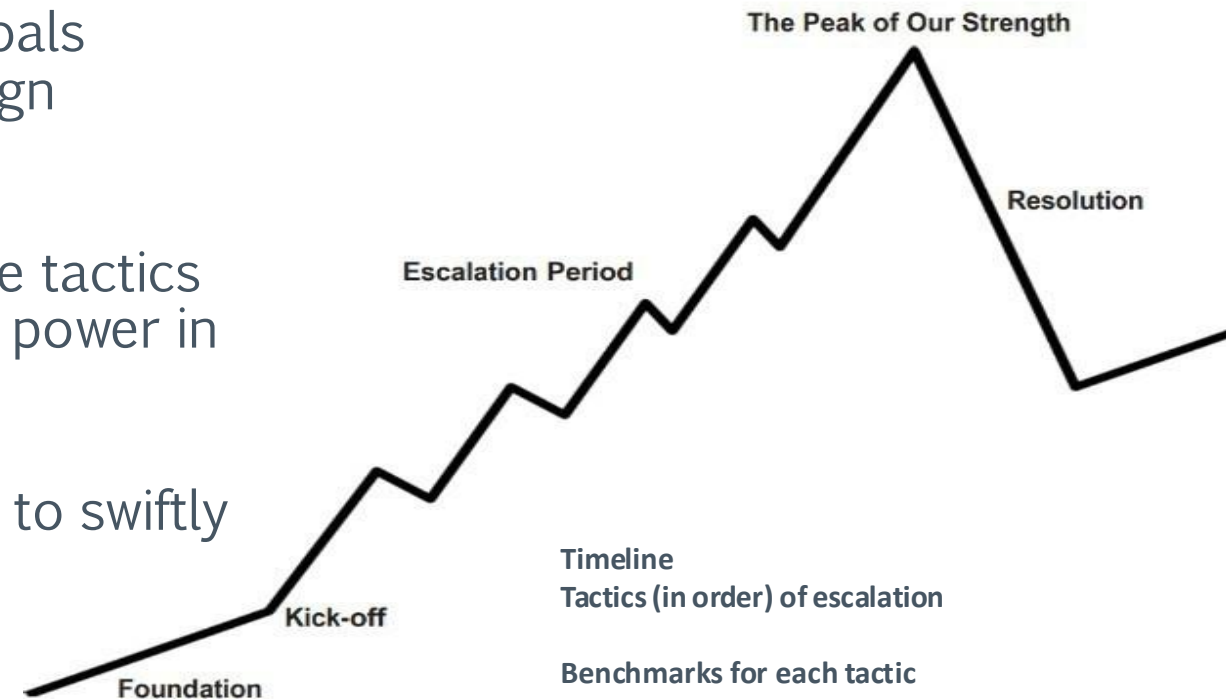
Creative Tactics Build Power –Joyful and creative tactics increase participation and strengthen collective power in campaigns.

Strategic Pivots – Plan for strategic adaptability to swiftly respond to critical redline actions or emerging challenges.

Escalating Campaigns – Craft and measure campaign tactics that escalate effectively to build momentum and impact over time.

CAMPAIGN MOUNTAIN

Phases of a Campaign



Developing a Theory of Change

Theory of Change helps define how your campaign will achieve its goals.

Key Components:

- Define the problem your community faces
- Identify the strategic goal (solution to the problem)
- Understand power dynamics: who has resources, who needs them
- Map your constituency's resources and influence
- Use If-Then planning to test assumptions

› Organizing Sentence:

- › We are organizing [WHO] to achieve [WHAT] by [HOW] to achieve [CHANGE].

Example of If Then Statement

"Our district's new policy will raise our health insurance premiums by 30%. **If** we don't act now and organize our union, then our families will be forced to choose between groceries and a doctor's visit. **But if** we come together, sign these union cards, and demand fair health coverage, we can win the benefits we deserve".

If -Then Thinking



The "if" (the urgent challenge): This section identifies the immediate problem, threat, or opportunity facing the community. It creates a sense of urgency that demands a response. In the example, the immediate threat is the company's new policy raising health insurance premiums.



The "then" (the contrasting futures): This part presents two possible outcomes based on the community's choice. It starkly contrasts the negative consequences of inaction with the positive, hopeful vision of success through collective action. In the example:

Inaction leads to a negative future: Families forced to choose between health and groceries.

Collective action leads to a hopeful future: Winning the benefits the workers and their families need.

Why do we do this?

Practicing "if-then" thinking helps a team:

- › Build a robust strategy by improving preparedness
- › Fosters collaboration and
- › Maintains momentum during a campaign.

By anticipating potential obstacles and proactively planning a response, organizers can reduce decision fatigue and react more effectively when faced with employer resistance or unexpected setbacks.

The Organizing Sentence

We are organizing **our community members** to **win** **affordable housing** by **lobbying city council** and **building a coalition with local tenants** through **door-to-door canvassing** by the end of the year.

This sentence follows the structure of identifying the people being organized, the strategic goal, the tactics used, and the timeline for completion.



Why do we do this?

Creating an organizing sentence helps a team:

- › Align their work
- › Summarizes the core elements
 - Who
 - Doing What
 - Winning by When

A single, clear statement provides focus and clarity, ensuring the entire team is working toward the same purpose.

Team Time

- Practice if then thinking
- Create a single organizing sentence
- Consider the POSSIBLE STRUCTURES you will need in this strategy
- Be ready to share



Key Points



- › A clear theory of change is essential to developing a shared strategy.
- › It helps organizers identify the power they have, the change they seek, and the path to get there.
- › Strategy then guides the escalation timeline and necessary pivots in tactics.
- › Tactics must be joyful, creative, and aligned with strategic goals to build lasting power.



Strategy and Tactics

Ben



What do you think
is the difference
between a
strategy and
tactic?



Strategy vs. Tactics

Definition of Strategy

Strategy is the comprehensive plan guiding a campaign towards its ultimate goals over time. It is the combination of your If then thinking and your organizing sentence

Definition of Tactics

Tactics are specific actions or steps taken to execute the broader strategy effectively.

Importance of Analysis

Effective tactics require analyzing problems, setting goals, understanding targets, and leveraging power forms.

Strategic Warning

Without a clear strategy, one risks becoming part of another's plan, highlighting strategy's critical role.

Joyful Escalation



Creative Participation Tactics

Joyful escalation uses creative methods like coordinated color days and art builds to boost engagement and morale.

Community Rallies and Songs

Song creation and community rallies energize supporters and create a positive atmosphere around campaigns.

Media and Public Influence

Joyful tactics attract media attention and help sway undecided stakeholders with a positive message.



Joyful Escalation



What makes
good tactics?

Tactics Must:

- Put pressure on your Target
(puts them out of their comfort zone)
- Build your Power
(develops leaders, brings more people in, etc.)
- Build Solidarity and Persistence
(joyful, creative tactics build hope and togetherness.)
- Be Strategic
(apply campaign resources to bring the most pressure possible at the key moment of the escalation)

On October 13th, 2011
community members blocked a
city-run foreclosure auction
at Kings County Supreme Court
in Brooklyn, NY.

Was this an
effective
tactic?

TEAM WORK – 5 Minute Tactic Brainstorm

+YOU HAVE 5 MINUTES!+

Brainstorm AS MANY joyful and creative tactics as you can on 1 chart.

You are **NOT** evaluating right now! Everything goes on the chart!



Team Work – 10 Minutes of Evaluation

TIME: 10 Minutes

Evaluate your tactics

Decide which tactics that you came up with are strategic based on the evaluation criteria

CIRCLE the tactics you decide are strategic

~~CROSS OUT~~ the tactics you decide are not strategic

Evaluating Tactics

- › Put pressure on your Target.
- › Build your Power.
- › Build Solidarity and Persistence.
- › Be Strategic.

Option for Evaluating Tactics More Deeply

- Does the action relate to your issue?
- Does it align with your values?
- Will it increase the pressure on the decision-maker?
- Is it visible?
- Is it timed for effect?
- Is it new and different—or tried and true?
- Are enough people ready to do it?
- Will it unify people?
- How will management react?
- Does it violate the law? (If so, are we prepared for the consequences?)
- Will it be fun?

Team Work – 15 Minutes Make a Plan for Each Tactic AND Identify the Structure Needed to Accomplish the Tactic

TACTIC	OBJECTIVE	TARGET	POWER LEVERAGED	SUCCESS METRIC
Walk-in Rally	Demonstrate unity and visibility	School Board	Reputational	Media coverage and attendance
Petition Drive	Mobilize community support	Superintendent	Political	Number of signatures
Art Build	Engage members creatively	Public Audience	Relational	Social media engagement

Key Points



Tactics allow workers to:

- › Share Resources, Values, and Commitment
- › Take risks together and achieve shared wins
- › Build trust in their own agency and the collective effectiveness of their union.
- › Are BEST when joyful, creative, and strategic



Redline Tactics

Katie

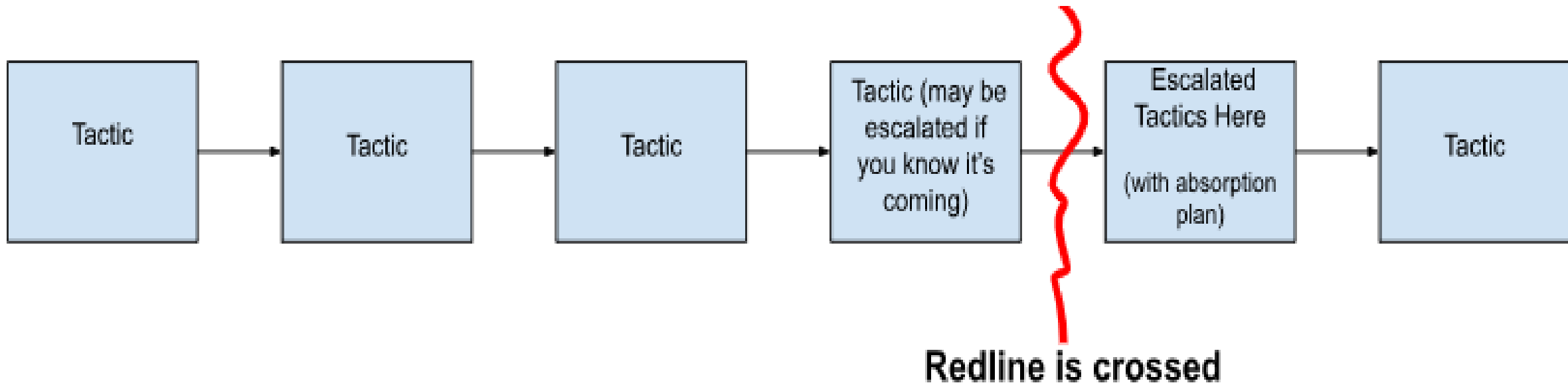


What will your target do as you implement tactics?

Escalation of Pressure

As you implement tactics that apply pressure, your target will will either:

- › Do nothing
- › Capitulate
- › React back



A “Red Line” tactic is the discriminatory practice of withholding resources, opportunities, or access from a specific group or geographic area. This is done to maintain existing power structures and undermine the community's organizing efforts.

Danger – Red Line!



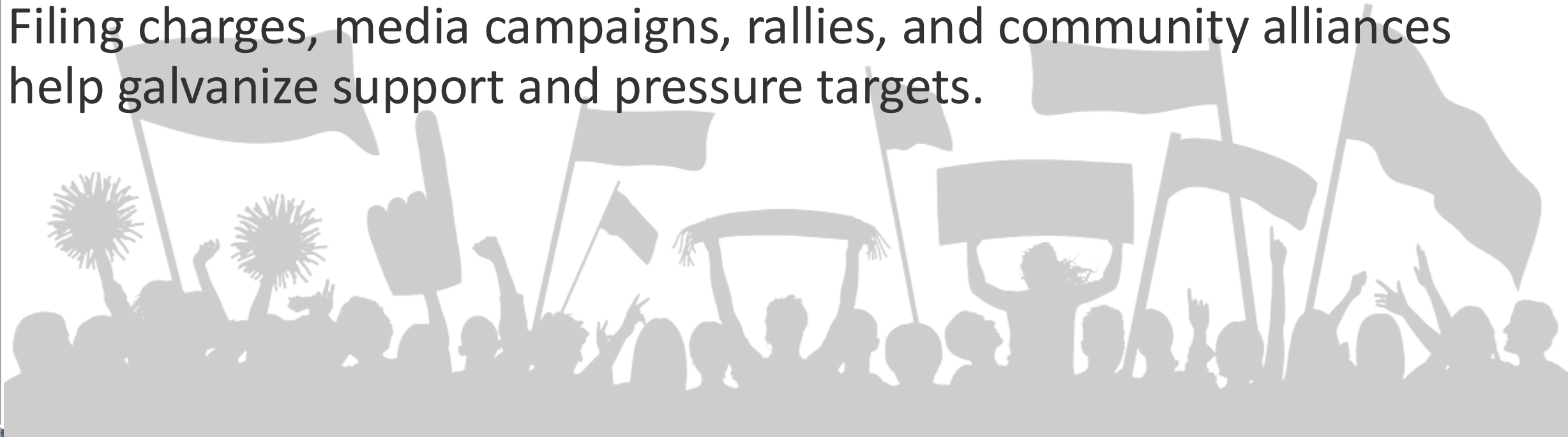
Redline Pivots

Strategic Campaign Pivots

Campaigns respond by shifting to public exposure and worker protection through higher visibility tactics, legal, and media actions.

Tactics to Increase Pressure

Filing charges, media campaigns, rallies, and community alliances help galvanize support and pressure targets.



Redline Pivots

- › Establish clear boundaries for what actions your campaign is willing to accept before there are escalated consequences
- › Provide a deterrent for further actions against your campaign
- › Force an outcome from the target



Planning Your Pivots

1. REVEAL — Expose the Injustice - Powerholders prefer to act in the shadows. If we want a redline to resonate, we must **bring the facts into the light** — using images, stories, and trusted voices

2. REDEEM — Validate your Position and People - Redlines often come with smear campaigns. Those affected are devalued, criminalized, or painted as disposable. Our job is to **re-humanize** them.

3. RE-FRAME — Interpret the Event as Injustice - The system will try to spin it — calling it a misunderstanding, an isolated event, or your fault. We need to **name it clearly as wrong**, and make it part of a larger story.

4. REDIRECT — Mobilize Outside the System - Redlines CAN be pushed into courts, reviews, or commissions — slow processes that demobilize people. Instead, we can channel public anger into **direct action and visible resistance**.

5. RESIST — Build Strength and Withstand Pushback - After redlines are revealed, the backlash begins — intimidation, bribes, threats. We can **protect each other**, expose these attacks, and build long-term strength.

Team Time – 20 Minutes

- › Using the Handout – Redline Tactics
- › Your team will identify at least one possible red line tactic you think your target is likely to employ
- › Follow the 5 steps identified in the handout to develop a plan.
- › Consider any structures you might need to consider in the event of Redline Tactics.

Key Points



Your response to the redline tactic should:

- › Establish clear boundaries for what actions your campaign is willing to accept before there are escalated consequences
- › Provide a deterrent for further actions against your campaign
- › Force an outcome from the target

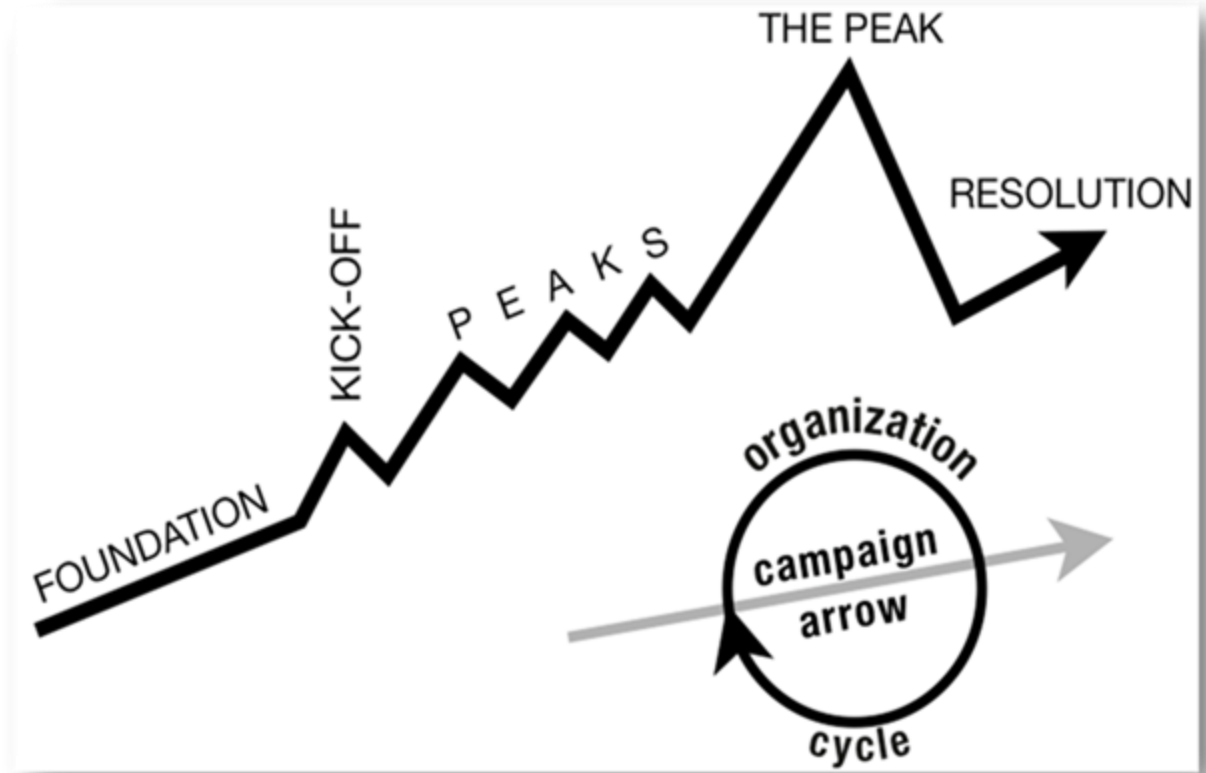
Timeline, Compression Points, and Escalation

Eric



Timeline

- › How long can you wait for the demand to be met?
- › Are you creating a deadline?
- › Is there an event creating the deadline?
- › How long will it take to identify the problem, identify the issues, build a leadership team, build a presence, etc. etc. etc.
- › When do you make the starting point?



Compression Points

Points on the calendar where you celebrate short term wins or escalate your tactics.

- Naturally occurring deadlines- *Breaks, Board Meetings*
- Artificial deadlines- *target has till day X to act*
- Help us build urgency and crisis

Why do you
think tactics
escalate
gradually?



- Less escalated actions prepare our people for more escalated actions
- Give the target a point to do the right thing before things escalate to the next tactic
- Use the threat of escalation
- Allows more people to join our base



Remember: The Ladder of Engagement

It is a framework to help union leaders **activate and elevate member participation** through a series of intentional steps.

Each step **builds trust, capacity, and ownership**—turning passive members into powerful advocates and leaders.

Steps to Solidarity

Campaign Ladder of Engagement



5 Reaching the Top

Creating Opportunities
for Others to Climb



4 Standing Steady

Holding Space for
Collective Voice

3 Climbing with Purpose

Building Strength
Through Action



2 Gripping the First Rung

Taking Hold of
Shared Purpose



1 Spotting the Ladder

Recognizing the Path

Incorporating the Ladder into Your Campaign Mountain



Map your members: Identify where individuals currently sit on the ladder.



Design your campaign: Align tactics with each stage to meet members where they are.



Track progress: Use engagement metrics to assess movement and adjust strategy.



Build culture: Reinforce that union work is shared, valued, and visionary.

Key Points



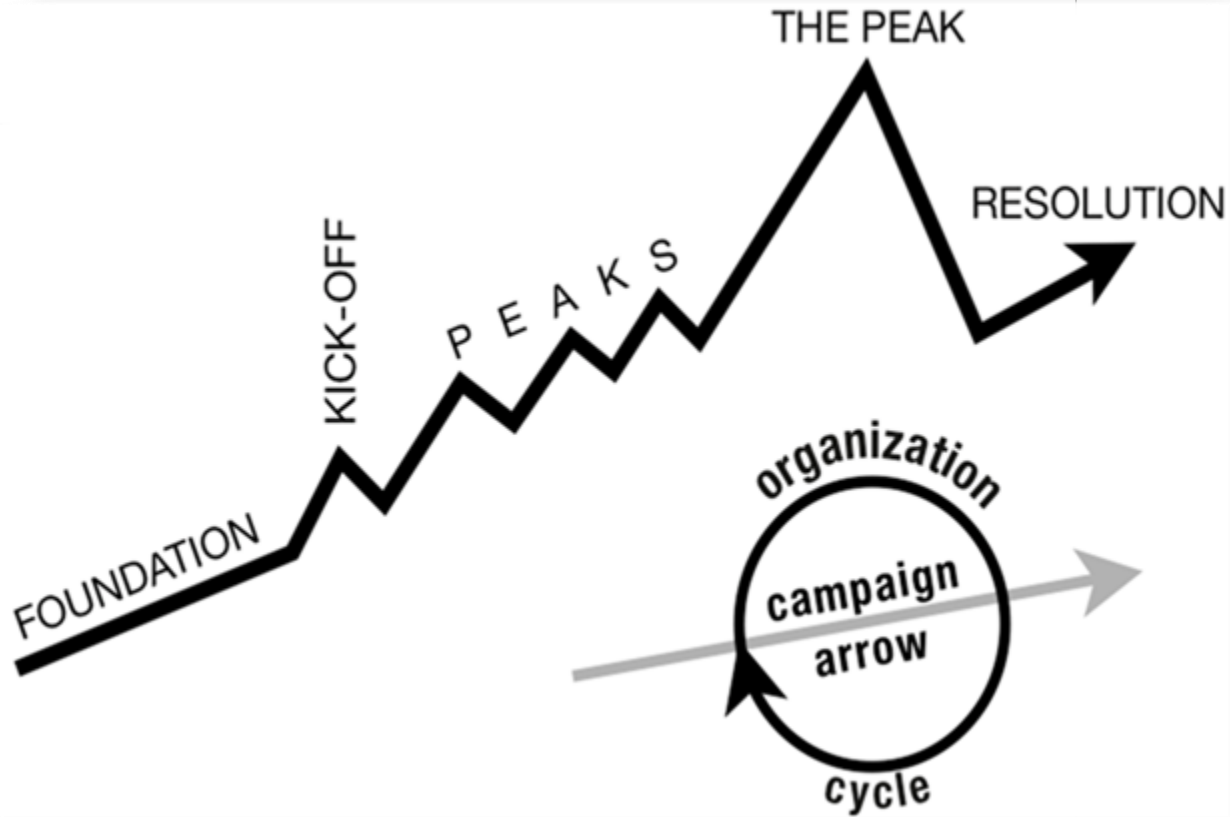
- › An escalating campaign is driven by the overall strategy
- › An escalating campaign is held together by a set of values and shared commitment to a demand.
- › Escalating tactics are how we develop leaders, identify new leaders, move more people into our base.
- › Escalations should be planned – but should also be adaptable (ex. redline tactics)

Team Time and Presentation

Everyone



Team Work



Develop Escalation Timeline

Create an escalation timeline of your tactics, the objectives, the success metrics and the structure for each.

Prepare Pivot Plan

Prepare a pivot plan to address potential redline events and adapt tactics as needed.

Finalize and Present Tactics

Finalize your strategic escalation plan and be ready to present a joyful, creative escalation of tactics, and possible pivots to the group.



Joyful and Powerful Tactics

Reflect on what characteristics make a tactic both joyful to execute and powerful in impact.

Linking Strategy to Escalation

Consider how your team connected strategy decisions to escalation processes during the activity.

Surprises in Redline Pivots

Identify unexpected insights or surprises experienced regarding redline pivots in the exercise.

Key Points



Strategy Guides Tactics

Every tactic should be directed by a clear and thoughtful strategy for maximum effectiveness.

Creative Tactics Engage

Joyful, creative tactics increase participation and improve visibility in campaigns.

Adapt to Redline Events

Strategic pivots are necessary during critical moments, avoiding panic to maintain campaign strength.

Build Leaders and Structures

Acting together builds leaders and develops structural power.



Sharing

Feedback time



- › Goal – 100% Participation
- › 6 Short Questions
- › We use what you give us

What is
becoming
clearer?

What remains
murky?

Housekeeping

Closing the Day

