



Campaign Planning



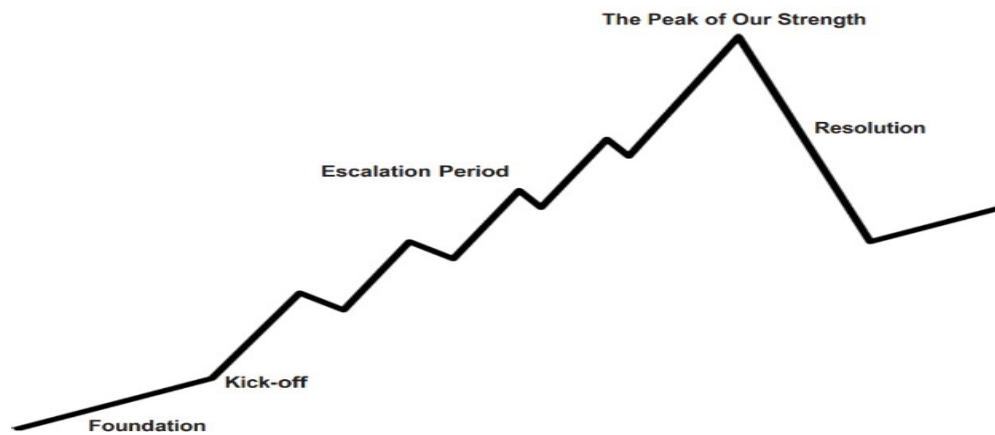
Campaign Mountain
Issues
Power Analysis
Targets
Demands
Tactics

Campaign Planning Document

Problem (<i>Big Issue, no clear solution</i>)	
Issue (<i>personal, manageable, specific to the problem needing to be solved with a tangible solution</i>)	
Demand (<i>What is it that we want in order to solve the issue</i>)	
Target (<i>Who has the decision making or resources to solve your problem</i>)	
Allies (<i>supporters on this issue</i>)	
Opposition (<i>do not support you on this issue</i>)	
Competition (<i>want similar resources you are asking for, may share your values</i>)	

CAMPAIGN MOUNTAIN

Phases of a Campaign



Timeline

Tactics (in order) of escalation

Benchmarks for each tactic

Data (*what will you collect and how*)

Campaign Team and Roles (*consider distributing responsibilities*)

Resources to support the campaign

CAMPAIGN PLANNING WORKSHEET

PROBLEM AND ISSUE

Who are my people (constituency)? What change do they need? Why is this important to my people (constituency)?

What is the problem we are trying to address?

What is a concrete solution to one part of this problem? This is our issue.

Is the issue..

- Widely felt and/or deeply felt?
- Winnable?
- Aligned with our values?

Does the issue..

- Build the union and builds leaders?

LEADERSHIP TEAM

Who is currently on the leadership team for the campaign? What are our roles and responsibilities?

Is this team representative of the membership/impacted community? If not, who else should be recruited?

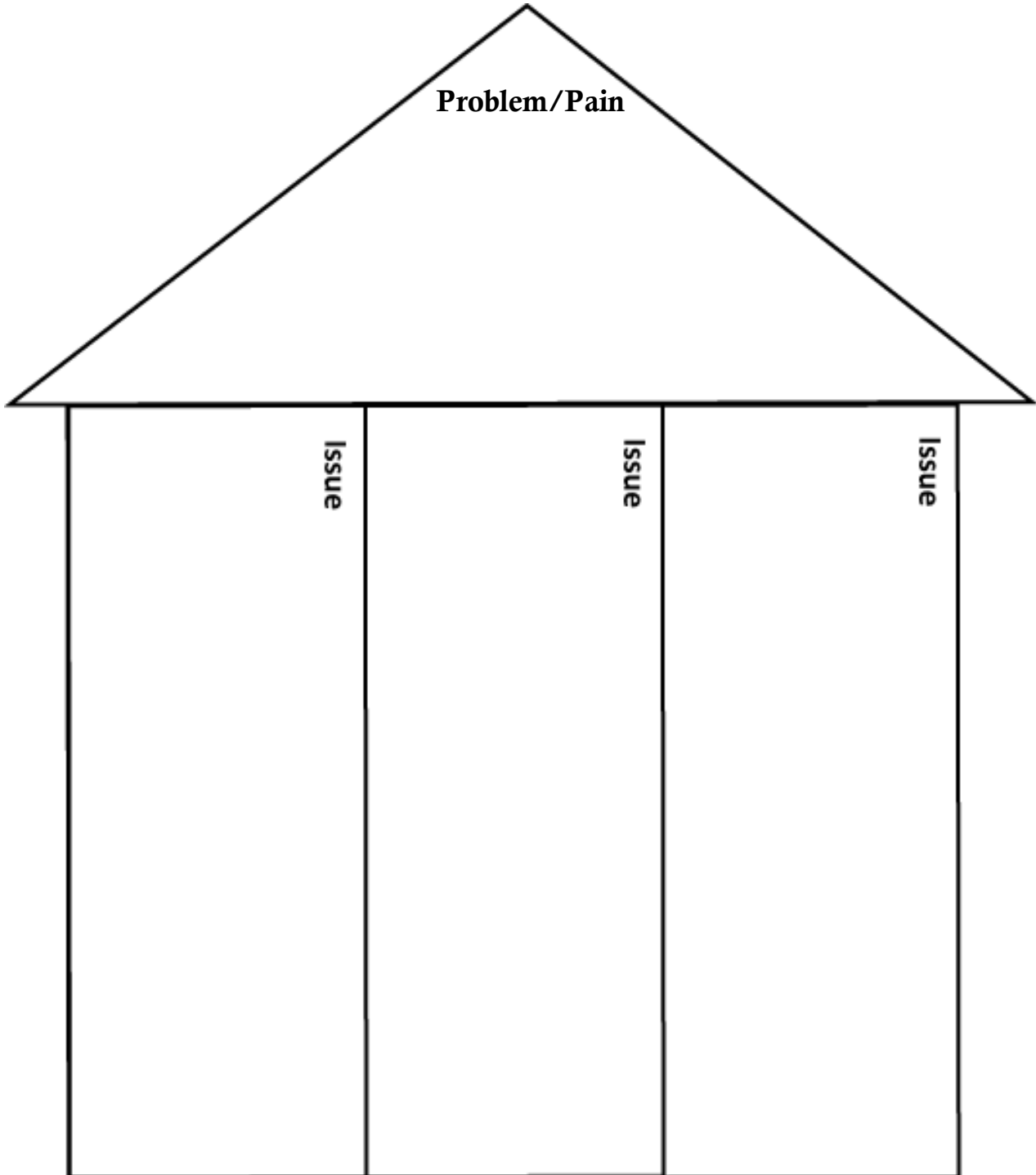
Who else needs to be involved in campaign planning and at which points?

Problems vs. Issues:

Problems are statements of the world as it is. **“There is no respect for educators in this building.”**

Issues are a diagnosis of the problem that almost indicates what the solution is. **“There are no recognized structures in this building that allow educators to be part of decision making.”**

Take some time to first brainstorm the pain and/or problems our people are feeling. Then work to identify the issues within that problem that are causing the pain. Asking, “why do you think this is the way it is?” can move you into an analysis of issues that make up the problem.





A GOOD ORGANIZING ISSUE

- **Is widely felt.** How common is the problem? How many workers face this situation? Many people must feel that this is a real problem and agree with the solution you're pursuing.
- **Is deeply felt.** Is this an issue that people feel strongly enough about to actually do something? It's not enough that many people agree, if none are really hot under the collar.
- **Is winnable.** It's hard to know for sure whether you *will* win, but it's possible to have a good idea whether you *can*. Your group should match your demand to the power you've already got.

To win, you'll need to make it harder for the decision-maker to keep saying no than to say yes. The more pressure you can bring to bear, the more issues will become winnable.

- **Builds the union and builds leaders.** Consider how this fight will build your capacity for future fights. Will the issue attract leaders or groups who haven't been very involved? Will it build solidarity between groups? Will it give you the chance to try an action that's one step beyond what you've done before? Will the solution lay the groundwork for future improvements?

Each fight should build off the last. It often happens that we don't win the concrete gain wanted, but we do come out smarter and better organized—which makes it more likely we can win next time.

- **Has a connection to students and the public.** If the issue affects students, parents and community, it grows your potential group of activists and the potential support.



Issue Criteria Check List:

Score each Issue from 1 to 3 (1 = No, 2 = Unsure, 3 = Yes) on the specific criteria then total your scores and compare with your team.

Will the Issue...	Issue #1	Issue #2	Issue #3
1. Result in a real improvement in people's lives?			
2. Give people a sense of their own power?			
3. Alter the relations of power?			
4. Be worthwhile?			
5. Be winnable?			
6. Be widely felt?			
7. Be deeply felt?			
8. Be easy to understand?			
9. Have a clear target?			
10. Have a clear timeframe that works for you?			
11. Be non-divisive?			
12. Build leadership?			
13. Set your organization up for the next campaign?			
14. Increase membership?			
15. Be consistent with your values and vision?			
16.			
TOTALS			

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POWER ANALYSIS

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?

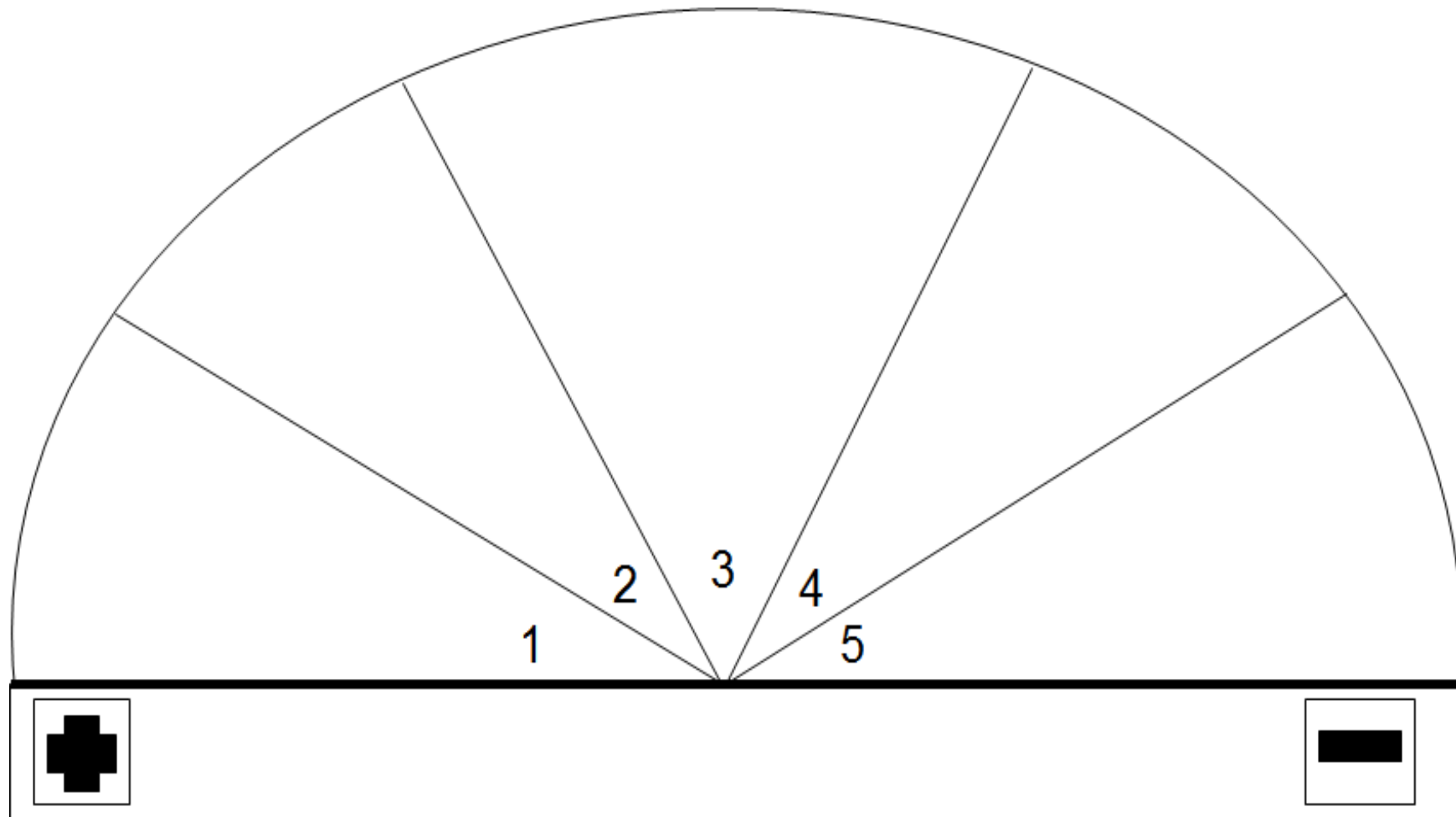
Who are allies on the issue? Who are opponents on the issue?

System Landscape

What are the decision making processes on this issue?

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

Problem Statement: _____



Source: Original Source – Training for Change (www.trainingforchange.org) and adapted into five segments by New Tactics in Human Rights.

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

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Worksheet: Spectrum of Allies Segments

1. **Active Allies:**

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:**

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:**

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.

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TARGET(S)

Primary Target

- Based on the 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?

Draft your Demand - What is the win that we want?

What is our demand? How will we know if we've won or not (it needs to be something we can see or touch that makes our lives better)? Remember – it's concrete. The win of this demand will result in visible, significant change in your constituent's daily lives.

1. Is it concrete (measurable)?
2. Does it make a visible impact in people's lives (meaningful)?
3. Does it leverage YOUR resources creatively and make for a good story (motivational)?
4. Must you organize and distribute leadership in order to accomplish?

Ex. LEA wants to secure a fully funded budget by demanding a 1-penny increase in the property tax formula by April 1st 2018.

Our Demand – Our Win is...

Identify the Target – Who can give you what you want?

Who is the target of your campaign efforts? A target has a name, a face, and an address. Who has the power to prevent you from getting your demand?

Our Target – Has the power to give us...

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)



CHECKLIST: CHOOSE TACTICS THAT FIT

Your escalating campaign is made up of many tactics. A tactic could be mild, like a survey, or militant, like a work slowdown. It could be traditional, like a picket, or it could be a creative stunt a member just dreamed up. When your group is weighing what tactic to try next, here are some factors to consider:

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

Sample Tactics⁵ — To be used by a local union or a regional or statewide campaign with localized actions.

Basic	Moderate	Advanced
➤ Coordinated buttons in the worksite or armbands (cheaper option) ➤ Hand out information at school events ➤ Sign employee petitions ➤ Coordinated visibility (clothing, union shirts, signs in cars or classrooms, etc.) ➤ Basic education with members on bargaining process and unsettled issues via 10 minute meetings, smart and concise written communications, short videos, etc. ➤ #RedforEd Days to repeat coordinated actions and use the color of red – national solidarity color for educators ➤ Regular worksite meetings that are well publicized ➤ Request financial information from employer or state on budget, management salaries and benefits, outside lawyers, etc. ➤ Membership drive to build member density ➤ One on one campaigns to assess member readiness and educate/agitate members to take action ➤ Small member delegations to board meetings or legislative committees to speak to the outstanding issues ➤ Phone bank members and other bargaining unit members to address questions and educate/agitate for solidarity ➤ Power map board members or key regional or state leaders and community to understand their interests and pressure points ➤ Coordinate member postcards or letters to targets (publish their contact information) ➤ Use the #RedForEd hashtag ➤ Encourage members to share photos of actions on their social media platforms	➤ Solidarity buttons in the community ➤ Create songs about our issue ➤ Informational picketing as large groups in public or at specific events with the employer such as bargaining or board meetings, including a “gauntlet” style layout where the employer must walk past members ➤ Votes of no confidence in the employer/decision-maker ➤ Votes of confidence in the union bargaining team ➤ Phone bank and letters to community members and parents to educate/agitate around the issues ➤ Phone bank and letters to fellow NEA members in area who do not work for the employer, other unions and ally organizations. ➤ Flood board members home mailboxes with postcards – one per member with a unified message ➤ Encourage community members to write messages to board members ➤ ArtBuild ➤ Picket sign creation ➤ Hold more frequent press conferences and press worthy events (highly visible activities) ➤ Create a community e-newsletter to send updates ➤ Organize coffee klatches ➤ Post lawn signs in the community ➤ Place ads in the school athletic programs and parent newsletters ➤ Keep track of the employer’s spending on anti-union activities, outside lawyers, etc. and make it public. ➤ Go door to door with leaflets in the community ➤ Consider a boycott of key businesses owned by board members or supporting management. ➤ Larger delegations of members at board members ➤ Organize building-based solidarity events such as walk-ins before work begins ➤ Create a community petition and/or pledge cards ➤ Create community flyers and share them at supportive businesses (on counter) or leaflet popular community events such as farmers’ markets, recycling centers, etc. ➤ Launch social media channels and post regularly to update the community ➤ Put floats in local parades sponsored by the union ➤ Hold press conferences ➤ Create shareable social media graphics ➤ Leaflet large school events like athletic games ➤ Set up informational booths at local events such as fairs, farmers markets, etc. (“truth booths”) ➤ Launch a landing page website ➤ Meet with community organizations with an interest in students ➤ Encourage other unions in the area to picket and act in solidarity ➤ Consider work-to-rule tactics that impact management, but not students. These tactics include leaving or arriving at work when the day begins, resigning from voluntary committees, passive participation in faculty/staff meetings, etc.	➤ Large community or regional or state rallies ➤ Organize and participate in parades ➤ Organize a speakers’ bureau to go to community events ➤ Marches on the employer/decision makers ➤ Occupying a decision-maker meeting ➤ Member and community delegations to speak at board meetings ➤ Show collective resistance at staff meetings through passive participation ➤ Pack up personal property from classrooms and offices ➤ Picket board members’ houses/work ➤ Organize coordinated walk-ins on the same day across a region ➤ Banner drops ➤ Civil disobedience (be sure to consult with your union’s legal counsel) ➤ Take over board meetings ➤ Hold “sleep ins” during bargaining sessions ➤ Hold large membership rally prior to school board meeting, then pack the room ➤ Attend critical bargaining meetings such as mediation or fact finding hearings and make sure board members see/hear us ➤ Find and open a strike HQ ➤ Hold a strike informational meeting for potential striking unit and other employees potentially impacted by a strike ➤ Train picket captains ➤ Ask athletic coaches to suspend games and work if there is a strike ➤ Reach out to area colleges to ask student teachers not to come to work if there is a strike ➤ Phonebank area substitutes to ask them not to take work at the school in the event of a strike ➤ Hold a strike authorization vote ➤ Hold community forums in-person or virtual town halls ➤ Hold neighborhood based meetings with parents and concerned community members ➤ Translate community outreach materials and go to communities with translators to meet with non-English speaking communities ➤ Work with community organizations to develop proactive plans to support vulnerable students in the event of a strike ➤ Consider a Facebook live to update the community on actions.

⁵ See Tactics Manual WEAC.doc in resource section.

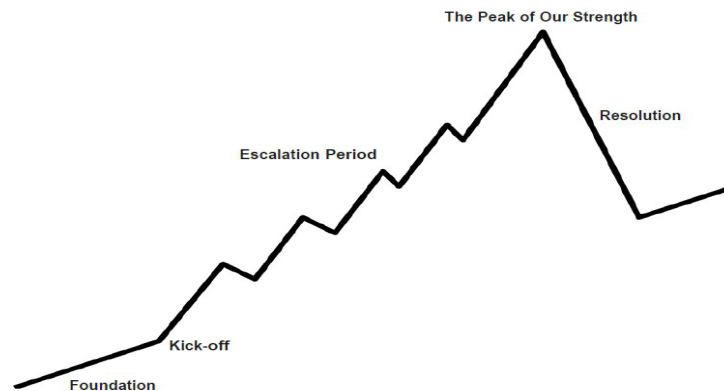
Number the tactics above in order of escalation:

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.

CAMPAIGN MOUNTAIN

Phases of a Campaign



COMPRESSION POINTS

What are the key dates to plan the campaign around?

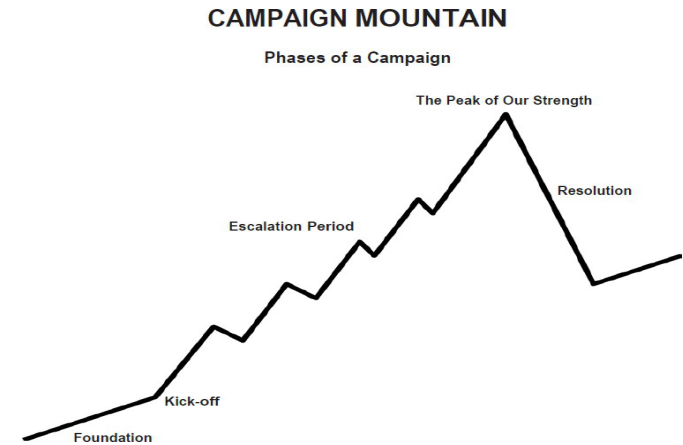
This can be either externally set dates (board meetings, breaks, etc) or internally set dates (deadlines we give to the target).

Campaign Assessment Tool: After Action Review

Rating	1	2	3	4
Widely Felt	We thought the issue would resonate, but it didn't.	The issue resonated with some workers.	The issue resonated with a majority of workers.	The issue resonated with a strong majority of workers.
Deeply Felt	The issue did not feel urgent to the workers.	Some workers felt urgency, but most would not engage in any but the least demanding tactics.	A strong majority of workers were motivated to take at least one action, but we lost steam as we escalated.	A strong majority were willing to take multiple escalating actions in order to win.
Winnable	We did not identify a winning strategy (or the issue turned out to be winnable without collective action).	We identified a strategy that led to a partial victory.	We identified a strategy that led to victory.	We identified a strategy that led to a victory even beyond what we had expected.
Builds the union and builds leaders	We are not any stronger as a result of this issue fight, and may even be weaker.	Some leaders engaged with the campaign, including a handful new to the cause. The union's reputation and credibility was not significantly enhanced.	Most leaders in the relevant constituency group for the action engaged with the campaign, including ones new to the cause. The union's reputation and credibility increased as a result of the issue fight.	Most leaders in the relevant constituency group for the action participated robustly in the effort, including ones new to the cause. The union's reputation and credibility increased significantly as a result of the issue fight.

CAMPAIGN PLAN TEMPLATE

Issue:	Target(s):
Demand:	Goals:



	Foundation	Kick-Off	Escalating Peaks				The Peak	Resolution
Timeline								
Milestone (Name the important phases of the campaign)								
Key Tactics								
Benchmarks (How do we measure success? Specific and measurable)								
Key Tasks (What do we need to do in order to achieve the benchmarks?)								