

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?

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?

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?

Secondary Target (if applicable)

- Based on the power analysis, who can move the primary target to give us what we want?

- Be specific. A target has a name and a face.

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?

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DEMAND (ISSUE CUT)

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.

MESSAGING

Who is the audience for the campaign messaging? Whose support do we need in order to win? What kind of message will reach them?

ORGANIZATIONAL ASSESSMENT

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

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)?

What budget and resources do we have for this campaign?

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.

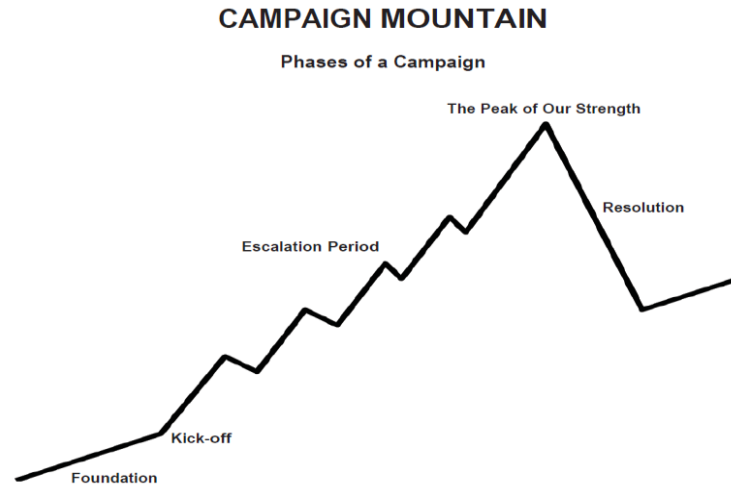
List the tactics above which meet the criteria below:

- 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?