

Planning an Advocacy Campaign (Democracy Center- <http://democracyctr.org/>)

- What do we want? (goals)
- Who can give it to us? (audiences)
- What do they need to hear? (messages)
- Who do they need to hear it from? (messengers)
- How do we get them to hear it? (delivery)
- What have we got? (resources; strengths)
- What do we need to develop? (challenges; gaps)
- How do we begin? (first steps)
- How will we know it's working, or not working? (evaluation)

Campaign Planning (Midwest Academy- <http://www.midwestacademyofmanagement.org/>)

Vision; Goals; Objectives; Organizational Considerations; Constituents, Allies and Opponents; Tactics; and Timeline.

Developing a Strategy (The Democracy Owners Manual by Jim Shultz)

- What do you Want? (Defining Your Objectives)
- Who Do You Need to Move? (Targeting Your Audiences)
- What Do They Need to Hear? (Creating Your Messages)
- Who Do They Need to Hear it From? (Picking Your Messengers)
- Taking Action (Tactics)
- Undermining Your Opposition
- Evaluation

How to Evaluate Tactics (Midwest Academy)

Can you really do it? Do you have the needed people, time and resources?

Is it focused on either the primary or secondary target?

Does it put real power behind a specific demand?

Does it meet your organizational goals as well as your issue goals?

Is it outside the experience of the target?

Is it within the experience of your own members and are they comfortable with it?

Do you have enough leaders experienced enough to do it?

Will people enjoy participating in it?

Will it play positively in the media?

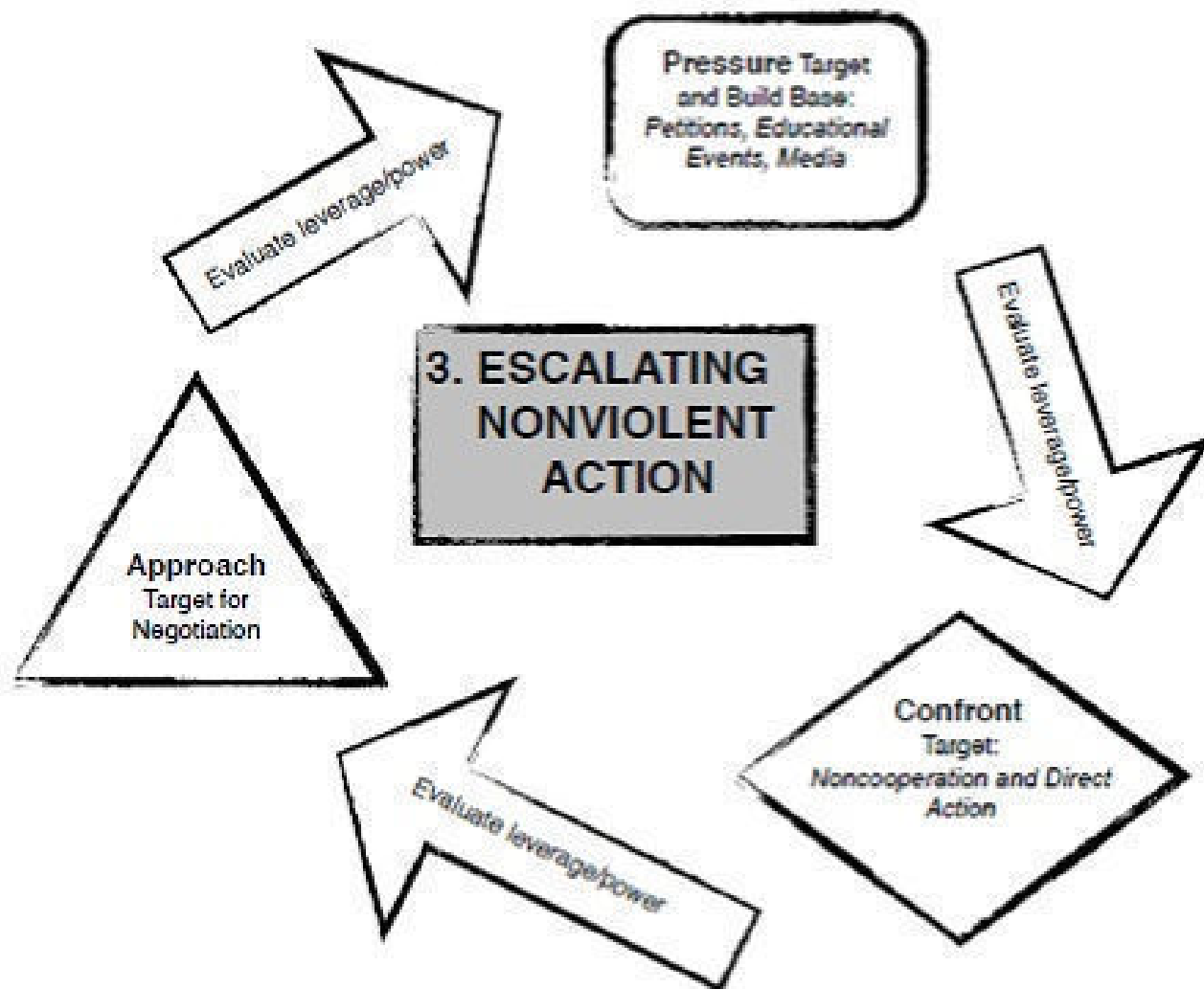
The We Divest Campaign Build!

1. PREPARE

- Organize: Establish an action group and group decision making
- Set goals by defining local wins
- Pick target
- Research your target
- Map your opposition and potential allies
- Calendar action plan

2. BUILD

- Develop leadership from within group
- Outreach to potential allies & coalition partners
- Educational Events to build analysis & to identify leaders or supporters



4. SUSTAIN

- Fundraise
- Media: mainstream, social media, etc
- Connect local wins to national and to future goals

The difference between goals, strategies and tactics

New Organizing Institute neworganizing.com

Goal: Getting backstage at a Justin Bieber concert.

Possible strategies, with accompanying tactics below each:

Strategy 1. Become friends with Justin Bieber's mom

- Join her book club
- Join her church
- Get your mom to introduce you

Strategy 2. Get Justin to notice you from on stage and invite you back

- Procure front-row tickets
- Coordinate posters and outfits among other attendees
- Throw something attention-getting onstage

Strategy 3. Become friends with the bouncer

- Dress in a way that he notices
- Buy him beer
- Date his best friend

Notice that the tactics for each strategy are unique, specific, and don't fit any other strategies. If you can stay committed to your goal, put creative strategies into place and use tactics that are effective in your specific situation, you'll be in good shape! And remember, if a tool or tactic helps you implement your strategy to reach your goal, you should use it (Justin Bieber's mom probably appreciates a nice young person in her book club). If it doesn't, then it's only going to be a distraction (throwing something attention-grabbing on stage at her church is probably counter-productive).

What would you do if you knew you couldn't fail?

Creating S.M.A.R.T. Goals

From Paul J. Meyer's "Attitude Is Everything."

You can attain most any goal you set when you plan your steps wisely and establish a time frame that allows you to carry out those steps. Goals that may have seemed far away and out of reach eventually move closer and become attainable, not because your goals shrink, but because you grow and expand to match them. When you list your goals you build your self-image. You see yourself as worthy of these goals, and develop the traits and personality that allow you to possess them.

SMART Goals	Goal Needs Work	Goal is Much Better
Goals should be <u>specific</u> .	I want to work with people.	I want to plan social and educational programs for children and adolescents.
Goals should be <u>measurable</u> . Have a yardstick for measuring outcomes.	I want to do well in my classes.	I want to earn a 3.00 GPA this year with no grade below B.
Goals should be <u>attainable</u> . Draft realistic goals that challenge you	I want to earn my law degree within one year of graduation.	I want to earn my law degree within 3 years of graduation.
Goals should be <u>relevant</u> . Make sure each goal is consistent with other goals you have established and fits with your immediate and long-range plans.	I wish to thoroughly review each career listed in the <i>Occupational Outlook Handbook</i> .	I will spend time in the Career Resource Lab researching careers associated with my Communication major.
Goals should be <u>time bound</u> . Give yourself time to achieve your goals.	I will graduate.	I will graduate in four years by taking 15 hours a semester

Specific - A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal you must answer the six "W" questions:

- *Who: Who is involved?
- *What: What do I want to accomplish?
- *Where: Identify a location.
- *When: Establish a time frame.
- *Which: Identify requirements and constraints.
- *Why: Specific reasons, purpose or benefits of accomplishing the goal.

Measurable - Establish concrete criteria for measuring progress toward the attainment of each goal you set. To determine if your goal is measurable, ask questions such as.....How much? How many? How will I know when it is accomplished?

Attainable - When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, skills, and financial capacity to reach them.

Realistic - To be realistic, a goal must represent an objective toward which you are both *willing* and *able* to work. A goal can be both high and realistic; you are the only one who can decide just how high your goal should be. Your goal is probably realistic if you truly *believe* that it can be accomplished.

Time Bound - A goal must have a target date. If you desire to make a million dollars, but don't set the timeline for it, it won't be motivating. A deadline too far in the future is too easily put off. A goal that's set too close is not only unrealistic, it's discouraging.

Long Term Goals: long term goals are simply a description of what you want for yourself in the future -- say about 3 to 5 years out. The best way to define them is to give examples: graduate college, get a good job, find a life partner, get rich quick, etc... A goal is not a plan, it's more like a wish list with (hopefully) a basis in reality.

Then set short term goals to reach that plan.

What can I do 6 months from now?

What can I do 6 weeks from now?

What can I do today?

Objective:

- To practice turning desired changes into SMART Objectives

Time needed:

30 minutes

Resources needed:

- Newsprint, Pens, Handout | SMART Objectives

How it is done:

Introduce and explain the concept of SMART objectives. Scribe the acronym to butchers paper or a whiteboard.

SMART objectives are:

S: Specific and Strategic

M: Measurable

A: Achievable (in the world)

R: Realistic (within the capacity of your group)

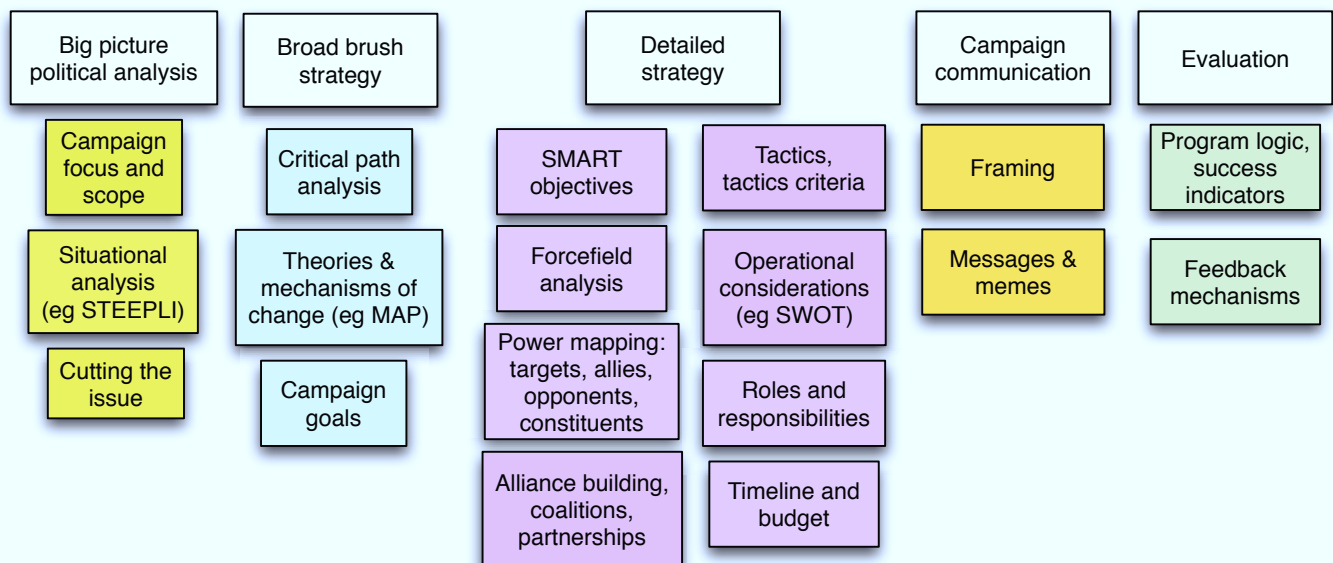
T: Time bound

In threes: Focus on the campaign you were working on during the critical path. Choose an outcome (stepping stone) or the campaign goal. It should be an outcome that you wish to see happen – not something you will do (we'll get to tactics later). In threes try and turn that outcome into an objective and test for SMARTness. Write in terms of By X, Y will do Z.

Debrief and check for SMARTness.

Source: Holly Hammond, James Whelan & Sam La Rocca, the Change Agency,
<http://www.thechangeagency.org>

elements of strategy



ADVOCACY STRATEGY IN A NUTSHELL

Example: “Fix Our Parks”

The Objective

We want our local parks to have safe playground equipment and organized recreation programs for our children and teens.

The Target Audiences

4*The Decision Makers:* parks and recreation commission; mayor; city council

4*The Influencers:* local media; PTA; neighborhood associations

Messages

4 “Our local parks are full of dangerous equipment and have virtually no organized recreational programs. Better parks will keep our children safe, give them something constructive to do and will build a stronger community for all of us.”

Messengers

4Children, teenagers, parents, local sports figures.

Taking Action

4A survey of local parks, released to the media, showing how many unsafe playgrounds there are, how many recreation programs, etc.

4A walking tour of local parks with the news media.

4A lobbying visit by kids and parents to local officials.

4A kids and parents protest at City Hall demanding action.

Note: This example is based on an actual (and successful) campaign waged by Coleman Advocates for Children in San Francisco.

Objective:

- To assist groups to select effective tactics and to think more strategically

Time needed:

40 minutes or more

Resources needed:

- Butchers paper and pens

How it's done:

Activists often love our tactics! We can even be wedded to our favourite tactics. In many of our groups, starting a strategy conversation at the level of tactics is often the easiest way to begin. Here's a tool to help move from tactics to a larger strategy conversation by analysing tactics!

This simple chart can create rich, insightful and sometimes heated conversations about the use of particular tactics at particular moments. Even a brief explanation can provide language to helping people frame issues like does this tactic increase our energy more than we can afford.

The chart is simple. Brainstorm some common tools you are using or might use in your group. Then as a group do the analysis together - learn from each other as you analyse and see disagreements/similarities, and notice strategic implications.

TACTIC	ANALYSIS OF TACTIC (on a Scale of 1-10 the amount of...)			
	Power it SHOWS	Power it CREATES	Energy it TAKES	Energy it CREATES/ REPLENISHES

As a follow-up to this process, consider doing a Maximise/Minimise of each tactic (i.e. how to make the most of each tactic).

Source: Adapted by Daniel Hunter, Training for Change
<http://www.TrainingForChange.org> from a design by Shari Silverstein, Quixote Centre.

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Power mapping

Objectives:

- To help participants consider the social and political context within which they are developing strategy.
- To creatively consider allies, opponents, targets and constituents prior to embarking on a campaign.
- To serve as a reminder and framework for subsequently revising strategy.

Time: 1 hour – 2 hours.

How it's done:

In pairs/threes:

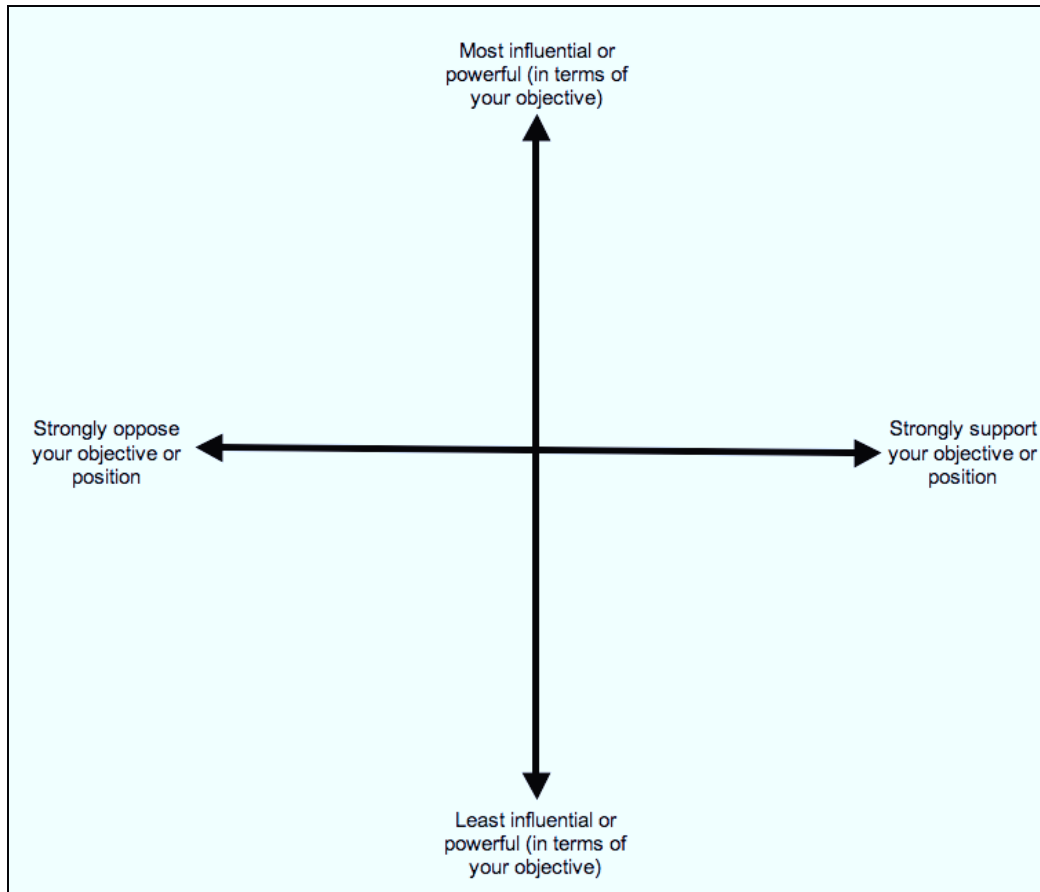
1. Think of a campaign you are involved with (or might become involved with).
What is it you are trying to achieve with this campaign?
2. Briefly describe your campaigns to each other.
3. Select one campaign for this exercise.

Consider: **“What is the main outcome your campaign hopes to achieve?”** Define this outcome in terms of a realistic and achievable objective (eg. recycling bins in every classroom or a doubling council's budget for native tree planting).

4. With this outcome in mind, write on the cards provided the names of organisations and people with whom you might need to engage in order to achieve this outcome. Start with yourself and the main decision-maker/s. You might like to include:

- | | | |
|---|--|---|
| <ul style="list-style-type: none">• your own group• other community groups - consumer, residents, environment, etc• local government - which officers?• state government - which departments or ministers? | <ul style="list-style-type: none">• churches• federal government - which departments or ministers?• local, regional and national media• property/ real estate developers• local businesses• experts• professionals (eg teachers, police) | <ul style="list-style-type: none">• particular sectors of the community• indigenous people• youth, unemployed, men/women, the aged• industry |
|---|--|---|

Each group needs a blank power map on butchers paper. This is a simple matrix with a horizontal axis and vertical axis. The vertical axis indicates the level of influence or power each person or organisation has to give your group what you are asking for. The top of this axis is where you would place people or organisations that have most power or influence. The horizontal axis indicates whether people support your group's specific objectives or if they are opposed to these objectives. At the left end of this spectrum are people who are most opposed to your desired changes or objectives. At the right end are people who support your objectives most strongly.



5. Place the card with the name of your organisation on the power map.
6. Identify the organisation or individual holding the most power in terms of delivering your desired outcome. Place this card on the power map, leaving some distance between the two cards.
7. Place each card in turn on the power map. As you place them down, say something about how they are related to your organisation, to the main power-holder and to each other. How much influence do they hold? Do they cooperate with each other or are they in conflict? Do you presently have a relationship with these people? Are they likely to agree with your position?
 - Position the cards according to the relationships that exist between them.
 - Consider the relative power of the stakeholders in your campaign. Who is closest to the key decision makers? Move them around. Spend at least five minutes until the map feels right.
 - Your partner/s in this exercise can help clarify power relationships by questioning you as you go along.
8. When your map is complete, identify the two or three locations within the map where you feel your campaign might effect the greatest influence. Are there people or organisations who hold power and who you might successfully influence?
9. Report back, discussion.

Here's a variation. Create the grid with masking tape on the floor. Invite participants to brainstorm the agents involved and place themselves on the grid to represent these individuals or organisations. Discuss and agree your campaign can do to shift these agents. To get the most from the exercise, participants need to do some research first

Where tool comes from:

James Whelan <http://www.thechangeagency.org>

Objectives:

- Examine the range of opinions that society may hold on campaign issues
- Consider the tactics that may be used for different groups of people as opinions begin to move nearer to supporting the campaign issue.
- Encourage participants to understand that it is not necessary to completely change the opinions of 'opponents' in order to succeed in a campaign.

Time needed: 30 minutes or more

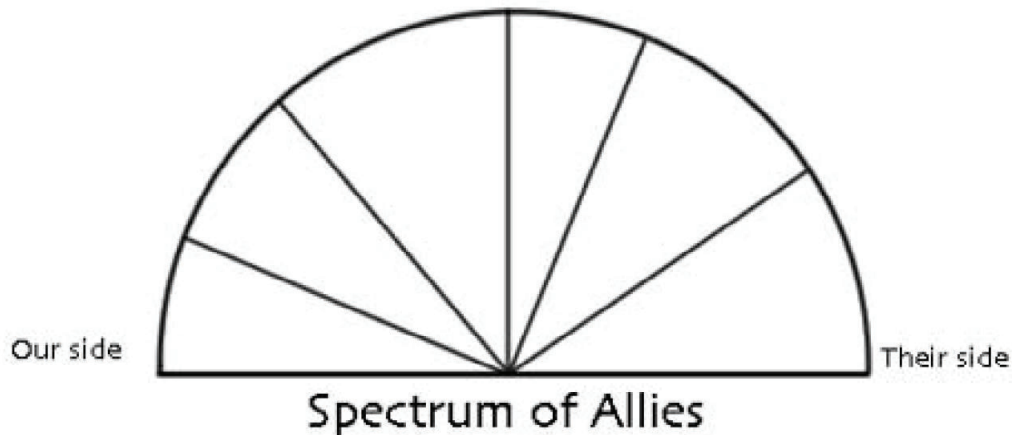
Resources needed:

- Newsprint and pens.
- Handout | *Spectrum of Allies*.

How it's done:

Use butchers paper to describe the idea that in most social change situations there is a struggle between those who want the change and those who don't. Those who do are represented by a point at one side of the paper (say, on the left) and the opponents by a point at the other side. Explain that societies (or towns, or states) usually include a range of groups that can be put on kind of spectrum from closest to the point of view of the advocates to farthest away, and draw a horizontal line to represent that.

Then draw a half-moon or half of a pie with wedges (as above). Ask for an example of an issue people in the group might be working on. Suggest a demand the advocates might have (say, free public transport) and ask who in society might be inclined to be most supportive, least supportive, and in the middle. Give examples:



As the participants identify groups and location on the spectrum, write them into the 'pie'. Do this only enough to make the idea clear.

Give the good news: in most social change campaigns it's not necessary to win the opponent to your point of view, even if the opponent is the power-holders. It's only necessary to move each of the pie wedges one step in your direction. Pause to make sure that is clear. Then complicate the picture slightly: sometimes polarization happens, and the wedges closest to the opponent move away from you and toward the opponent. You can still win, if enough of society takes a step in your direction.

Let the group digest the good news for a bit; let it sink in that activists often have the mistaken idea that they need to win everyone (inviting despair), or that their whole attention needs to be on the power-holders (again inviting despair).

Pass out the handout and invite everyone to fill in the wedges for their particular campaign/issue/movement. Move among them to answer questions as they work.

Create small groups for discussion. If a variety of issues are present in the group, ask them to form issue groups to compare notes. Let them work for a while (keeping track of their work), then ask them to brainstorm tactics that might effectively communicate with the wedges that they want most to win as allies.

To conclude, harvest the learnings in the whole group using butchers paper. Emphasize points like this: it's a huge win if you can get a group that was slightly hostile to move into neutrality. It's a huge win if you can get the group/wedge next to your end of the spectrum to move into activism with you. It's usually not necessary to move the opponents a step toward you in order to win, although it can hasten the win.

Source: This tool has history in many formats around the world. This version written by Martin Oppenheimer & George Lakey 1965, *A Manual for Direct Action*, Quadrangle Books.