

“Would you tell me please, which way I ought to go from here?” asked Alice in Lewis Carroll’s Alice In Wonderland.

“That depends a good deal on where you want to get to,” the Cheshire Cat answered.



Strategic Organizational/Campaign Planning

The first question is where do you want to go?

What is your Vision; Your Goals?

Vision ---How do you want things to be? If this issue or problem is resolved, how will the situation have changed?

Goal ---We tend to use 'goals' as the bigger picture steps toward our vision and objectives to denote the more specific steps we are hoping to achieve along the way.

To take defining vision/goals from the abstract to the real world, let's look at an example from a group in Pennsylvania that is concerned about the impacts of the massive gas extraction industry and children's health.

Vision: Children will travel back and forth to school and attend their school in a healthy environment. School populations will not be impacted by the Hydrofracturing industry, keeping them out of harm's way, when they walk, bike, learn and play in a healthy safe environment and school.

Goal: To pass a state law that provides a buffer zone (a distance around school property) where there can be no natural gas extraction related infrastructure or traffic from trucks and other commercial vehicles servicing the industry.



Be careful not to make the common mistakes of setting goals too big, not specific enough and too many, unless you have an army of people.

What specific or tangible outcomes do you aim to achieve to further the plan?

Objectives should be SMART --- Strategic, Measurable, Achievable, Realistic and Time-specific. Clearly defined objectives makes for a motivated constituency and successful plan.

How do you go about passing a statewide policy?

Where do you start?

Begin with who can make (your goal) happen. In this example, who has the power to decide *yes* on a school buffer zone policy?

Make a list of people not institutions/government agencies.

- Governor Bigman can through an Executive Order.
- State legislators can by passing legislation, the chair of the legislative environmental committees are State Senator Mr. Icare and House Representative Mr. Noway.
- Local city council members, township supervisors can pass an ordinance locally.
- And so on to all possible options . . .

For each person on your list (of people who can give you your goal) you need to explore:

What do they need to hear? (messages)

Note: Positive messages work better than negative messages

Who do they need to hear it from? (messengers)

Who has credibility or do they care most about voters, PTA's, mothers, doctors, teachers . . .

How do we get them to hear it? (delivery) your group tactics

News media, events, children's activities, on campaign trail, one on one meetings . . .



CAN
YOU
HEAR
ME
NOW?

Now you have a list of various people/decision makers and what might make them decide in your favor. What in the world do you do with this? Who do you focus on first?

Don't get ahead of yourself. Before you can decide *who*, you need to explore what resources you have to move forward and how you can use those resources to build power. The goal is to *work smarter not harder*. So let's explore resources.

You need to explore your resources, reach, allies and opportunities.

- For example, you know of three other community groups in different areas that are also talking about a buffer zone around schools. (opportunity, possible allies, reach)
- The teachers and school staff are on your side and want to do something. (allies, resources)
- You have some funds from a donor who wanted to pay for lawn signs and another neighbor who is great on social media. (resources)
- A state legislator's child goes to school in the next town over where there is fracking infrastructure and had a recent accident – Rumors are that he's angry. (opportunity & reach)
- Gather all the information you can about connections, allies, skilled people at various tasks, possible financial support and so on.

Additionally you need to explore and list who is likely to oppose you.

- In this example, one likely opponent would be the oil and gas industry.
- Another might be local elected leaders, as they are the industry's friend due to jobs or resources the company might bring to the local economy.
- It is also possible that the school administration will oppose you or certain labor unions.

So let's now look at all three segments together.

Place your lists next to each other so you can see what you have, what don't have and where you might begin to build a strategic plan of action.

Who can give you what you want?

What would make her/him give it to you?

What resources do you have to create the pressure to win.

How can you neutralize the opposition?



Using this example of school buffer zones, let's pick a primary target and explore secondary targets and different strategies. Let's look at the results of your list making brainstorm to define the focuses (targets).

Governor Bigman through an Executive Order.

- You would need statewide support and advocacy.
- Resources to support a statewide effort would be critical for meetings, briefings, phone banks, advertising, etc..
- You would need to neutralize the opposition which could be time consuming especially when your efforts need to react to their constant efforts in the media, lobbying and so on.
- Your group alone has little influence on the Governor.

State legislators can write and pass legislation.

- The legislators have been in grid lock along party lines and nothing passes – not likely option.

Local city council, township supervisors can pass an ordinance locally.

- Your group has the most power at this level.
- One other school district has already passed a buffer zone ordinance
- You have several areas where accidents have occurred that might be more interested in creating a buffer zone because of that experience.

When designing a campaign you need to define short term and long term goals and steps to accomplish those goals. Goals and steps are critical to working in a smart strategic way to accomplish your ultimate goal, keeping you focused and helping your group to be proactive instead of reactive.

Short term goals:

- Attend x number of Parent/Teachers meetings to educate them on the issue and introduce the buffer zone goal.
- Circulate a petition requesting the Gov. to take action (with date for delivery and goals for number of signatures).
- Hold a community meeting and establish committees to help raise money, design yard signs, go door-to-door.
- Find x number of conferences like teachers unions, disease related like asthma, learning disabilities, etc. to leaflet and table at.

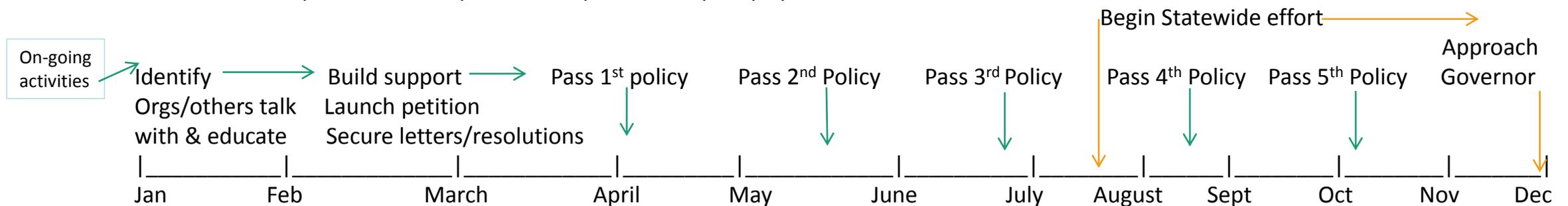
Mid-term goals:

- Get x number of established groups to write a letter asking the Governor to use his power to create buffer zones.
- Hold x amount of children's "activities" like a fair with games and face painting to reach new parents and others.
- Meet with media, write letters to the editor and meet with the editorial board of newspapers locally.
- Pass local ordinances in x number of school districts. (To built support and demonstrate need.)

Take your goals and activities and place them on a timeline. Where do we want/need to be in 1st month, 3 months, 6 months, 9 months and a year from now?

To accomplish your goal using the previous example, it was decided that you would need to pass local policies in at least 4-5 school districts to build the base support and demonstrate the “people” concern before approaching the Governor in December. So a timeline might look like the one below.

What would the plan look like if you were to pass such a policy by December?



IMPORTANT: Actually place your short/mid-term goals and associated activities on a calendar.

When thinking about activities that are on-going remember holidays each month that you can incorporate into your work with themes like . . . “Scare the Gov.” in Oct. with the huge # of signatures on the petition, “Have a Heart,” Valentines Day, “May Day,” “Independence Day,” and sports themes like “March Madness,” “Super Bowl,” “World Series,” and so on. Also consider what is often called *Hallmark Days*, Grandparents, Mother’s, and Secretary day. It’s fun and you can give 12 volunteers a month to design an activity plan.

This is a simplistic example, however the point is that unless you know where you are going you can’t fully understand priorities, work plans, resource needs or can successfully do an effective power analysis.

Now that you have a plan –

DON'T PUT IT ON A SHELF AND FORGET ABOUT IT!

You need to use it as a guide and remember it may need to be adjusted based upon new opportunities, crises or ideas.

Every quarter (3 months), gather everyone together and review where you are.

Ask:

- What is working?
- What is not working and why?
- What have we learned so far that would make us work smarter not harder?
- Do we need to adjust the plan to reflect this information?

Lastly, don't forget to celebrate your steps forward no matter how large or small before the meeting ends.



Now that you have a understanding of how to put together a plan the following is a template for you to begin.

What is your Vision and Goal(s)?

Vision should be short no more than two succinct sentences. What would the world look like or what would have changed if you were to win on the specific goal. Keep it short, simple so everyone can understand, ambitious to be exciting but not overreaching and aligned with your organizations values.

Vision:

Goals Long Term (2-5 years):

Goals Short Term (1-2 years):

Who has the power/authority to give you what you need/want (your goal)?

Remember it's *who* – make a list of all options you can think of.

Next to their names put the what/reasons that would motivate her/him to give it to you. Complete the chart for three “who's” before listing others. It's easy to just make lists and get lost.

You can make a chart on a piece of paper that looks like this.

Who #1:

What would make # 1 take action?

Who #2:

What would make # 2 take action?

Who #3:

What would make # 3 take action?

Make two lists: A list of likely allies and a list of likely opponents.

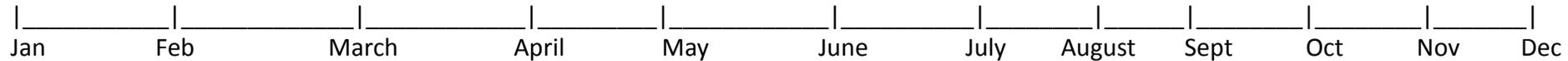
Allies	Opponents

Analyze your information and your resources.

Where you begin, is based on the information you just created. To go directly to the Governor or President would not likely work so where you might start is closest to “home” and work your way up the power ladder. This plan needs to be realistic and with in your resource limits.

Making the plan real with deadlines and activities.

Now that you have a first draft of a plan, place the activities on a calendar. This will not only help you focus but the exercise itself will indicate how realistic your plan is based on availability of people, resources and time. Additionally you might put on the calendar events/opportunities that are scheduled which can provide themed activities like the 4th of July Parade, County Fair, Candidates forums and so on.



A horizontal timeline with 12 tick marks representing the months of the year. The months are labeled as follows: Jan, Feb, March, April, May, June, July, August, Sept, Oct, Nov, Dec.

After completing your draft plan go back and add names of people who will be responsible to ensure each of the activities takes place. That person doesn't have to do all the work, rather s/he would coordinate the elements of the activity, find others to do the various pieces of the work and be the nudger to get it done.