

The Just Enough Planning Guide™

**A Roadmap to
Help Nonprofits
Reach Their
Campaign Goals**

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Many Thanks

It took a lot of brainpower to collect, collate, process and trim the content that would become *The Just Enough Planning Guide*™. Somehow we convinced phenomenal experts—folks who have been involved with campaigns from coast to coast and around the world—to join us in this endeavor. This publication is much better for their insights, funny stories and words of wisdom—and, most importantly, for their guidance. Collectively, they made this guide what it needed to be: a strong planning tool that helps people plan without bogging them down. We at Spitfire Strategies and the Communications Leadership Institute could not have done this on our own. We have many people to thank.

There were the people who showed us the lay of the land. They taught us what resources were already out there and shared with us how they work their magic on campaigns. Thanks to Heather Booth, Midwest Academy; John Bouman, Sargent Shriver National Center on Poverty Law; Tim Burga, Ohio AFL-CIO; Laurie Cooper, Alaska Wilderness League; Tony Folen, Ad Council; Myrna Greenfield, Oxfam America; Ilyse Hogue, MoveOn.org; Matt James, The Henry J. Kaiser Family Foundation; Brett Jenks, RARE; Andrea Kavanaugh, Pew Environment Group, The Pew Charitable Trusts; Peter Knights, WildAid; Rob Michalek, Ben & Jerry's; Michael Perry, Lake Research Partners; Duane Peterson, Business Leaders for Sensible Priorities; Ron Pollack, Families USA; Hans Riemer, Rock the Vote; Russell Stevens, SS+K; Marcia Trask, Adobe; and Wendy Wendlandt, U.S. PIRG.

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Last, we'd like to sincerely thank Barry Gold of the Gordon and Betty Moore Foundation for having the vision to understand how to help nonprofits keep their campaigns on track and win. Thanks, Barry. Without you, we'd still be stuck in first gear.

A handwritten signature in black ink, appearing to read "Kristen Grimm". The signature is fluid and cursive, with the first name "Kristen" written in a larger, more prominent script than the last name "Grimm".

Kristen Grimm



For some people, planning a campaign is less about following a process and more about following their instincts. Long-time campaigners believe they have a feel for the road. With each new campaign, they load the station wagon with all the gear that has served them well in the past—all the tools and the processes. They have a destination in mind, shift into autopilot, and the campaign strategy unfolds from reflex and memory. Experience has taught them well—they pack light and know all the shortcuts. Or do they?

For less experienced campaigners, the tendency is to overpack for fear they'll find themselves down the road lacking a key tactic or guide. They bring it all along for the ride. Then, they often hit every attraction and marker along the way, even when it pulls them off track from their true destination—if they were even clear about their destination when they started.

Organizations looking to run effective campaigns need to find the middle ground between the underpackers and the overpackers. They must chart the “happy planning medium” between the Autobahn speedsters and the country road rovers. They need a go-to planning source that offers assistance with the campaign at hand and campaigns ahead—a guide that can help them define their destination, assess whether or not they can get there, launch them in the right direction, measure their progress and (when necessary) be flexible enough to make changes on the fly.

With funding from the Gordon and Betty Moore Foundation, Spitfire Strategies and the Communications Leadership Institute set out to find the perfect approach to campaign planning. In our search, we found that groups approach campaign planning in many different ways. Some follow highly detailed guides and processes that we dubbed the “*War and Peace* planning method.” These

Who Is This Guide For?

This guide is designed to work best with policy campaigns, issue campaigns, corporate campaigns and public education campaigns. If you are looking to pass a law, win popular support for an issue, organize a boycott or let a bunch of people know that something is bad for them, this guide is for you. It could also help you with another type of campaign, but we chose to focus on the types of campaigns mentioned above to make the tool more concise.

costly affairs are time intensive, cover even the most minute details, and take a long time to learn and implement. Other groups seem to wing it, resulting in one of two possible outcomes—haphazard success or derailment. Surprisingly, a number of the campaigns with seemingly little planning still achieve exactly what they set out to do. However, a good many others are stymied by unforeseen events that derail them and cause the campaigners to waste too much time and money to ever get things back on track.

After much effort, we could not find the campaign planning tool we were seeking, so we created this: *The Just Enough Planning Guide*™. It borrows from what we consider to be the best practices out there and provides organizations and coalitions with a planning process that gives them a clear sense of where they are going, the best way to get there, and what to expect along the way.

To those using this guide, we make three promises:

1. *We didn't make this up.* We studied dozens of campaigns, some successful and some not, so we could share the lessons learned. We also asked bona fide experts who have won a campaign or two (and lost others) to describe the key planning elements—not all the bells and whistles, just the “must-haves”—and we included those here.
2. *We left plenty of room for flexibility and creativity.* For minimal planners, this guide doesn't constrain the creative process; rather, it helps you organize your creativity in a way that channels all your brilliant ideas to help you achieve your campaign's goal. It also lets you build your campaign your way. You determine the main components of your campaign—we help you plan for them.
3. *We kept it as simple as possible.* We know that a successful planning guide can't burden you with so many stops, detours and roadside attractions that you start asking, “Are we there yet?” This guide will help you on your way, not get in your way.

What Is a Campaign?

A planned course of action formulated to achieve defined objectives.

How This Guide Will Help You

Before you begin, remind yourself that your current campaign is the most important campaign you have ever attempted. Whether you have managed one campaign or one hundred, every campaign is unique and requires an approach and a plan that are perfectly suited to achieve your objectives.

Every campaign should start by asking what you want to achieve and whether you can achieve it, two questions that are often glossed over. Next, you need to ask yourself the hard questions. Is your organization really ready? Is the time right? Do you have the budget necessary to make an impact? Do you have the staffing to implement the campaign? Is there a constituency ready to be mobilized? Are you willing to take the risks necessary to win? Are you prepared to fail? These questions need to be asked each and every time you consider launching a campaign.

The Just Enough Planning Guide™ will help you to systematically build the right plan to make the greatest impact for your cause. It will help you ask the right questions that lead to the right answers for your organization. These answers will define your campaign strategy. Our guide will also help you make the critical decisions about who needs to be at the table and when you need them there. Most importantly, it will help you get your campaign plan on paper. Too many great campaigns never get off the ground because they remain great intentions floating about in organizational ether. Writing it down makes it real and gives your team something to follow.

The Road Ahead

The Just Enough Planning Guide™ takes you through nine stages of campaign planning. During each stage, you will make specific decisions. The guide offers a variety of ideas, questions and examples to help direct your decisions, but ultimately the decisions are yours to make. Remember: there is no one-size-fits-all campaign model. Your campaign is unique and therefore your plan and decisions will be unique. Look to the examples for inspiration, not hidden answers.

The key to good campaign planning is to start with the core elements and then add layers from there. Above all, write it down! Written plans will help keep the effort focused. The guide will lead you through a planning process in stages that are logical to us. However, you may decide after Stages 1 and 2 to shuffle things around. You can. This is your adventure. But we do recommend that you hit all nine stages before saying, “We’re done”—even if you tackle them in a different order from what’s presented here. And because we want to continuously improve and update this guide, we hope you will share with us suggestions for how we can make it better.

The nine stages to successful campaign planning are:

1. **Confirm that a campaign is possible.** This is the time to step back and assess the viability of a campaign. Are the stars aligned for this effort to be successful?
2. **Set a clear, measurable goal that is achievable.** Your plan needs to be focused on achieving a very specific goal. Your goal is your *raison d'être*. Are you trying to make something happen or stop something from happening? There is a difference.
3. **Chart your course.** Much like a road trip, there are likely many ways to get to your goal. You will use your knowledge of the field and the external environment to determine the best steps to your goal.
4. **Anticipate conditions.** Visualize all possible scenarios—the good, the bad and the ugly—so your plan includes strategies for leveraging opportunities and mitigating challenges, including identifying your opposition.
5. **Know how to make headway.** What will propel you down your path? What major campaign activities can help you get from Point A to Point B?
6. **Prioritize your target audiences.** Now that you have a strategy, stay focused by prioritizing who you need to engage to win, and when.
7. **Put a public face on your campaign.** Give the effort a name and a personality that is memorable and easily understood. You want people to recognize what you are about and not have to guess.
8. **Operationalize your campaign.** Based on the activities you think will help you make headway, determine which campaign tactics you will need: from intellectual knowledge to government relations to public mobilization to communications to coalition building to fundraising.
9. **Stay on track.** Build evaluation mechanisms into your plan that will tell you when you are making progress and when you need to stop and make a mid-course correction. Meet regularly with your team to discuss your progress.

Before You Begin: Mapping the Course

Before you start planning, you need to decide what your planning process will look like. It should be streamlined. Set a schedule and stick to it. Know which decisions you need to make, when you need to make them, who you need to involve and when you want them engaged.

There's a saying that a camel is a horse designed by a committee. This seems like a particularly hard knock against the camel, but the point is well made. As you expand the number of people involved in planning, you run the risk of creating internal inconsistencies and unnecessary complexity, and, worst of all, you could lose sight of your campaign objectives. The key is to keep it tight and keep it small, but empower those on your team to do the work and trust that they will.

Once you decide to plan, it is critical that you articulate the process and confirm that everyone involved is speaking the same campaign language. Tell them which decisions need to be made when, and assign specific roles to everyone involved in the planning process. The most common roles are as follows:

- **Input Givers.** These are people inside your organization whose opinions you will ask for, consider and then either incorporate or disregard. They know that you value their ideas but understand their contributions are not the final word.
- **Decision Makers.** These are people who directly influence final decisions. You will give them the information they need to decide—and they will give you a decision when you need it.
- **Hard Truth Squad.** These are people who don't have a dog in the fight. They are the ones who can be an unbiased sounding board for your goal and your plan, telling you where there are weaknesses.
- **Buy-in Providers.** These are people who need to think the plan is solid and will throw their support behind you when you need it.

TIP Keep it small.
The bigger
the group, the harder it
is to do planning in an
efficient way.

You can be frank with input givers and decision makers about their roles. Tell them what you need them to do and set up interactions for this to happen. You can do the same with the people who make up the Hard Truth Squad; tell them they are there to challenge your assumptions and ask the critical questions that may only be obvious to an outsider. The buy-in providers are trickier. Those individuals who can get you buy-in from others need to be kept up to speed so that when you present the final plan, they don't dismiss it. You need to give them a chance to raise red flags and make them feel like they are part of the process (with little formal role) so they easily buy into the outcome. At the same time, you need to prevent them from hijacking the process and taking your campaign off course.

Decide where funders, allies, coalition members and other stakeholders fit into your planning efforts and assign each a role.

Be Clear About Where You Are Going

Once you know who will help you plan, be clear about what the plan needs to do. Decide what big questions the planning process will answer, and clearly define the parameters, such as budget and timing, that will drive most of your decisions.

Keep the Pedal to the Metal

Like a good story, planning needs a beginning, a middle and, most importantly, an end. Although there will be conflict along the way, the plan should generally be a happy story that keeps moving and comes to a popular resolution.

Keep planning meetings well organized. Assign a project manager. Set and disseminate agendas in advance, and include specific discussion points and decisions that need to be made during the meeting. Start on time and end on time.

People like a smooth planning process. A planning process that is confusing, disorganized and constantly misses deadlines will likely result in a disgruntled planning committee and yield a plan with the same traits.

Fire Up the Engine and Let's Get Going

Once you have a planning committee that understands its role and a planning process that fits into your overall timeline, budget and objectives, you are ready to start planning. The following process will help you do it. After each stage, be sure to pause and ask yourself, "Does this make sense?" When you are done with your plan, make sure your Hard Truth Squad gets a chance to review and check your assumptions.

Let's begin!

Stage 1

Confirm That a Campaign Is Possible



You may need to get a policy implemented, grab people's attention or change the behavior of people or companies. If it hasn't happened up until this point, why is it possible to do something now? Why are you the right group to do it? Before you start, you need to know that you can run and win a campaign at this time. More than deciding how you will do it, you are answering the simple question of whether you should greenlight a campaign or not.

To help think this through, consider the following.

- Is there something right about the timing? Is a bill up for reauthorization? Is there an external event (like the Olympics or a presidential election) that gives you a chance to raise an issue that couldn't be raised before? Do you have an alliance of groups ready to take something on? Is a new administration taking office?
- Is there enough knowledge out there about the problem you want to tackle? Is there an obvious need for a solution? How do you know?
- Is there a constituency or an audience that can be mobilized?
- Do you have a solution you can clearly articulate?
- Do you have or can you get the expertise needed to run a campaign?
- Why is your organization the best one to tackle it?
- Do you have the risk tolerance it will take to run the campaign? Are you willing to make difficult decisions and unlikely alliances? Will you do what it takes to win?
- Do you have or can you create a campaign-like culture where decisions get made quickly? Is your board ready to give you the necessary leeway? Is the organization's leadership ready?
- What are the consequences if you lose? Could you live with them in the short term and long term?
- Do you have or can you get the resources it will take to get the job done?
- Do you have enough time?
- If you are going to lobby, are you clear about the legal restrictions?

After walking through these questions, decide if a campaign makes sense. If yes, open the *Planning Tool* and start your planning by marking “Yes” in the box for Stage 1. If you aren’t sure, think more. Campaigns take a lot of time, energy and money. You should feel confident that you can run and win a campaign before starting one.

Keep Your Eye on the Prize

A central objective of the Human Rights Campaign’s mission is to pass federal legislation banning discrimination in the workplace based on sexual orientation and gender identity or expression. In 1994, the president and congressional leadership seemed open to a narrowly tailored bill, prompting the HRC to create a communications strategy to support that legislative effort. However, subsequent changes in Congress and the White House left a campaign strategy focused solely on Washington destined for failure.

Rather than face defeat, the HRC shifted its campaign tactics and decided to demonstrate to Congress that there was broad support for nondiscrimination policies in the business community—a constituency they knew elected officials really cared about. The HRC set its sights on generating and publicizing businesses that voluntarily integrated nondiscrimination policies into the workplace. The group launched a Web site to track the policies at more than 5,000 companies, including all of the Fortune 500, and began issuing reports and an annual index highlighting the country’s best performing companies in terms of nondiscrimination and other policies.

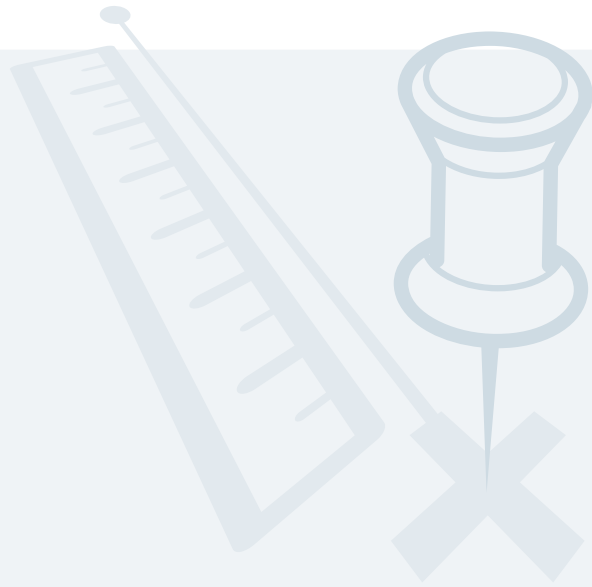
The HRC gambled that if Fortune 500 companies adopted policies voluntarily, then Congress might be more willing to legislate these policies. The group managed to keep the campaign focused on its core mission of fairness by demonstrating that nondiscrimination policies are a low-cost benefit that gives companies a competitive advantage for recruitment and retention.

That gamble appears to be paying off. To date, more than 300 of the Fortune 500 companies have nondiscrimination policies, and companies now monitor their HRC ratings and seek ways to improve their scores.

The Lesson: While the HRC could not win on Capitol Hill at that moment, they succeeded in making nondiscrimination an accepted principle of contemporary business. By changing strategies and redefining what “winning” meant from a communications perspective, the HRC has spent the last several years “winning” on its issue rather than “losing” in Congress.

Stage 2

Set a Clear, Measurable Goal That Is Achievable



Start with what you want to accomplish, set a hard deadline for accomplishing it, and be as specific as possible.

Here's a good example of a solid campaign goal:

Secure state legislature designation of a network of marine protected areas off the Santa Barbara coast by December of 2009.

TIP

Remember, not all campaigns

are big splashy public affairs. Sometimes your goals are best served by keeping your campaign behind the scenes.

It says exactly what needs to happen, by whom, where and when. **Here are some more examples of good campaign goals:**

- Pass a statewide ballot initiative in November 2008 that imposes an additional 13-cent tax on tobacco products in California.
- Get Congress to pass a "Sense of the Senate" by 2010 that states the need for the United States to institute comprehensive and cost-effective national measures to address global climate change.
- Influence the governor to increase funding for child care by \$3.5 million by the end of the year.
- Decrease smoking rates among teenage girls in five states by 10 percent by 2009.
- Increase the number of people carpooling in Maryland by 20 percent within three years.

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Stage 2

Here are some campaign goals that miss the mark:

- Get the governor to fund more programs that support families.
- Get more parents to give their children “the talk.”
- Stop drunk driving.
- Stop global climate change.

These goals are too broad, and any efforts to plan for them will quickly become diluted or stymied.

A specific goal gives clear direction to the planning process. Specificity narrows the focus of the campaign in measurable ways, such as geography, audience and timeline. In short, make sure your goals pass the SMART test—specific, measurable, achievable, realistic and time bound.

Use the *Planning Tool* to record your campaign goal.

Stage 3

Chart Your Course



Once you have a crystal clear goal, determine what steps you need to take to get there and when you need to take them. This will require some decision making on your part. There may be many roads to get to your final destination. You need to decide which way is best for your organization, given the climate surrounding the campaign and your skill set, budget and timeline.

Let's say you are planning the Young Achievers Campaign, and your goal is to require all ninth-graders in your state to complete a post-high school life plan as part of their ninth-grade curriculum. What can you do to make that a reality? First, brainstorm about all the possible ways this could happen:

- You could go county by county and get every school board in the state to make it a rule.
- You could get the state legislature to pass a law.
- You could get the governor to issue an executive order.

Once you have an exhaustive list, assess each option and decide which one is most viable. Ask questions such as:

- Which option is fastest?
- Which option is easiest?
- Which option do you know the most about?
- Can you learn from other organizations and campaigns that have had success in the past?
- Which option involves the fewest dependencies and assumptions? (Dependencies are things that you are expecting to happen, and, if they don't, there will be consequences for your campaign.)

Pick the route that is best for you, but only include the major stops along the way. If your campaign was a road trip from Washington, D.C., to Denver, you would write down *“Drive from the district to Cleveland and then to Chicago and then to Omaha and finally Denver,”* not *“Back out of the driveway and then turn right at the end of my block, drive three blocks and then make a left at the mall,”* and so on. Keep your route broad for now.

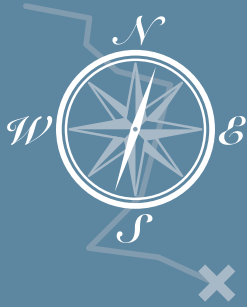
At this point, you may find yourself scratching your head because you have no idea how to achieve your goal. If this is the case, have no fear. Research will help you find out how to make change happen. Your research needs to answer these types of questions:

- Who is the audience you need to inspire and mobilize?
- Where do you want change to occur? Within which populations, organizations or individuals?
- Who will need to change, whether it requires a change in attitudes, behavior or priorities?
- Who is responsible? Who has jurisdiction at federal, state and local levels (U.S. Department of Agriculture, state boards of education, school boards, etc.)? Who is the decision maker?
- Who possesses the power to influence the decision maker?
- What factors and competing pressures play into program decisions?
- What are previous examples of this kind of change?
- Who has the greatest potential to make change? (This is not always the one who is responsible. Sometimes, it can be the one who has the greatest influence over the ones who are responsible.)
- Will you need a behind-the-scenes effort or a big public effort?
- What are the pressure points that will make the people you want to engage come to the table?
- Who are potential allies?
- Who is the potential opposition? Competition?
- What secret weapons do you have at your disposal (celebrity spokespeople, unlimited budget, etc.)?

Once you have a good idea of how to make your campaign goal a reality, consider the steps needed to make that change. Don't worry quite yet about the challenges ahead. Focus instead on specific steps that need to happen now and the order in which they need to happen. Estimate the timing for each one.

Let's go back to the earlier example. Suppose the Young Achiever Campaign opts to get the state legislature to make it a law that all ninth-graders submit a post-high school life plan by the end of their freshman year of high school. The group then charts these specific steps.

Stage 3



What is your Goal: Have the state legislature pass a bill that requires all ninth-graders to complete a life plan.

Steps to Your Goal

- 01 *Begin campaign*
- 02 *Mobilize parents to call for bill*
- 03 *Bill introduced in both chambers*
- 04 *Vote favorable from both committees*
- 05 *House passes*
- 06 *Senate passes*
- 07 *Governor signs*

What principal steps do you need to take to make your campaign successful? By when must these steps happen? Remember, time does not stop for your campaign. Internal and external factors can and will dictate when these steps need to happen.

Go to the *Planning Tool* and fill in the main steps you need to take to win your campaign. When you have written these down, take the steps to your Hard Truth Squad and have its members poke holes in them. Then settle on a course.

Stage 4

Anticipate Conditions



Now it is time to truly understand what you are getting yourself into. To get a real lay of the campaign land, you need to identify and understand the many routes, shortcuts, potholes and rest stops that stand between you and your goal. Conduct research to answer the following questions:

- Who supports your goal?
- Who should be for your goal and isn't yet?
- Who is against it? Why? What will they say about it?
- What is competing with it?
- Why do you think you can achieve your goal? What assets do you bring to the table?
- Why do you think you could lose? What baggage comes if you lose?
- Who will you need to engage along the way to win? (These are the target audiences you will need to bring on in some way.)
- Who makes the ultimate decision? Do you see them saying yes or no?
- Are you doing this in your own time, or is there an external deadline driving the timing? For example, is there a school curriculum overhaul coming down the pike? Is Congress ending a session?
- Rank dependencies and assumptions that you are counting on and that may change things dramatically if they prove false. For example, if you are counting on teacher support for the addition of life planning to the curriculum, how will you adapt if teachers begin complaining and organizing against an increase in mandated curricula?

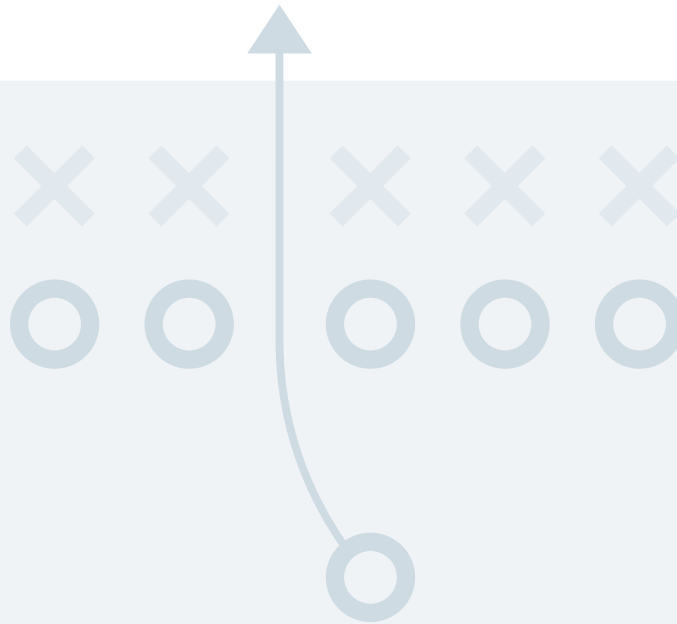
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Stage 4	

To find answers to these questions, review recent media coverage on the issue and related issues; publicly available opinion data; materials from other organizations working in this space; and press releases, speeches and public statements from elected leaders, corporate leaders and other influential people. You can also conduct stakeholder interviews of people in the know and ask them for their assessment. In short, research the heck out of the issue to get a clear sense of the context into which you are launching your campaign. At that point, your analysis should give you a good lay of the land and signal to you if this will be easy or hard, or somewhere in between.

Stage 5

Know How to Make Headway



You know your goal, your steps to your goal and some potential opportunities and obstacles that may affect your progress. Now it is time to move your campaign forward.

Going back to the chart from Stage 3 (Chart Your Course) in the *Planning Tool*, take each step and figure out exactly what needs to happen to achieve that step and when it needs to happen. For each one, ask, “How can we make this happen?”

TIP

Don't get into the weeds. You will have an opportunity to fill in more details later. For now, just give the broad strokes of how and when you envision successfully completing each step. What major activities do you want to conduct?

The campaign planners for the Young Achiever Campaign will have to ask:

- Who might introduce this bill? They can pick a few target legislators.
- What will motivate someone to introduce a bill to make this change? The campaign could decide to mobilize parents and teachers to ask a legislative leader to introduce the bill. This would then become the first step.
- If they go with that approach, how will they mobilize parents?

Now we get into the real work between the steps. Campaign planners need to decide the major activities necessary to get from one step to another, and they need to determine the benchmarks that will tell them to move forward or take a step back. The campaign planners could decide that they will release a report showing how few ninth-graders have given any thought to college or job prospects after high school and why that is a problem. They can release it to the press in the counties of key legislative targets. They can build a Web site where parents can get more resources on the issue, including instructions, templates, phone numbers and addresses for contacting their legislators to ask them to introduce legislation.

For each step, be clear about who the decision maker is and what you are asking her or him to do. Also, be clear about when you need them to do it. Timing is everything. Consider the following questions to help you find ways to motivate your decision maker in the right direction:



There could be many different paths for you to take. But you are the master of your own destiny. You must decide what is best, based on what you know—and that's a lot. No matter how much you know, though, gather input from the experts around you to make your final decisions.

Awareness Level

- Is the decision maker aware of the issue? If you ask her or him, will she or he be able to identify the major positions on the issue?
- If the decision maker does not know about the problem, how can you inform him or her about the problem and its consequences in a way that resonates with his or her core values or concerns?

Concern Level

- Does the decision maker consider it a problem to be solved? Does she or he care?
- If the decision maker knows about the problem but does not care about it, how can you educate him or her about the consequences of the problem in a way that resonates with his or her core values or concerns?

Likelihood of Support

- Is the decision maker aware of your preferred solution?
- Is the decision maker supportive of your preferred solution?
- If the decision maker knows and cares about the problem but does not know about the solution, how can you inform him or her about the solution in a way that maximizes the likelihood that awareness will lead to support?

Obstacles to Overcome

- Why would the decision maker decline to take the desired action? If you don't know the answer, who can you ask?
- If the decision maker knows and cares about the problem and believes in the solution, how can you tailor the solution to avoid obstacles that could deter him or her from acting?
- If the decision maker knows and cares about the problem and knows about the solution but does not support it, how can you tailor the solution to increase the likelihood that he or she will support it?

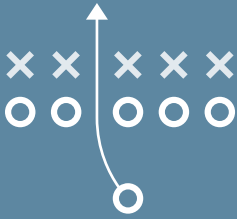
You will now have a revised strategic goal line that is SMART.

To determine what you need to do to move from step to step, ask these key questions and then choose major activities based on the answers:

- What assumptions, facts and values support this step?
- What audiences will need to be engaged to achieve this step?
- What do you think will make this step happen?
- What are the potential obstacles to successfully achieving this step?
- What can you do to minimize the obstacles? (Tweak your activities accordingly.)
- What are the successful benchmarks that tell you it's time to move on to the next step or to retool efforts if things aren't working out?

You should be able to use these defining questions to fill out how the campaign can move from one step to another. You can provide more tactical details about exactly how to make these main activities happen when you operationalize your campaign in Stage 8, which will give the staff responsible for different campaign elements their marching orders.

Stage 5



What is your Goal: Have the state legislature pass a bill that requires all ninth-graders to complete a life plan.

Steps to Goal	Main Activities	Benchmarks and Timeline
01 <i>Begin campaign</i>	<ul style="list-style-type: none"> • Release report • Hold parent meetings • Generate press 	<ul style="list-style-type: none"> • 20 meetings with parents (May 5) • Stories written in top five newspapers (May 30)
02 <i>Mobilize parents to call for bill</i>	<ul style="list-style-type: none"> • Get parent target lists from allies • Generate calls to target legislators • Build Web site and ask parents to write legislators 	<ul style="list-style-type: none"> • List of 20k+ parents (June 10) • Over 3k calls (June 20) • Over 10k emails (June 20)
03 <i>Bill introduced in both chambers</i>	<ul style="list-style-type: none"> • Identify bipartisan sponsors in House and Senate • Draft bill • Secure co-sponsors • Press release announcing introduction 	<ul style="list-style-type: none"> • Secure sponsors (July 12)
04 <i>Vote favorable from both committees</i>	<ul style="list-style-type: none"> • Sponsors ask for hearing • Testify before hearing • Meet with swing votes on committee 	<ul style="list-style-type: none"> • Deliver testimony (Sept 4) • Secure support of 20 swing voters (Sept 12)
05 <i>House passes</i>	<ul style="list-style-type: none"> • Meet with votes in House • Develop talking points for sponsors • Generate calls to target legislators • Rally at the Capitol 	<ul style="list-style-type: none"> • Generate 3k calls (Sept 24) • 5k parents and children at Capitol rally (Oct 4)
06 <i>Senate passes</i>	<ul style="list-style-type: none"> • Meet with votes in Senate • Develop talking points for sponsors • Generate calls to target legislators • Press release announcing passage 	<ul style="list-style-type: none"> • Generate 3k calls (Oct 10) • Get coverage in top five media markets (Oct 15)
07 <i>Governor signs</i>	<ul style="list-style-type: none"> • Rally at governor's mansion • Secure invites for signing ceremony • Write op-ed commending legislators and governor on big win for kids 	<ul style="list-style-type: none"> • Get diverse group of 100 parents and children at ceremony (Nov 1) • Place op-ed in state newspaper (Nov 2)

Goal: ninth-graders required to complete life plan

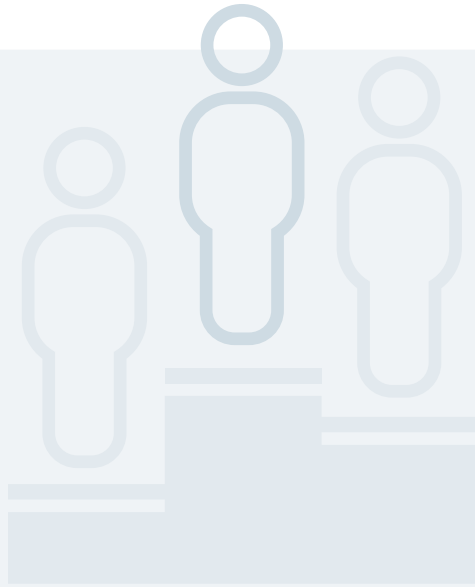
You may find that you don't know how to achieve some steps or how long a step might take. You may know who you need to motivate, but you might not know how to do it. In these cases, you'll need to determine what additional research is needed. It could involve polling and focus groups, or it could be as simple as asking a few people some good questions.

During the campaign, you may decide to change your steps. Something may happen that allows you to leapfrog a step. For example, a legislator may decide on her own to introduce legislation without hearing from parents. Now you don't need to mobilize parents to get the bill moving. You can move your efforts to building support for the introduced bill. If you have a mid-course correction such as this, you will need to revisit all the remaining steps to your goal and readjust the major activities, roles and timeline.

At the end of this stage you'll have a strong goal and strategy diagram to present to your key partners for them to review and approve. You can then take this document to your buy-in group for approval. Obviously, you'll want them to agree with the direction you have chosen, your main interventions and your symbols of success.

Stage 6

Prioritize Your Target Audiences



Once you have a strategy in place and the sign-off you need to move it forward, you must prioritize your target audiences. Review who the primary decision makers are from your strategy. Then list and prioritize all the important target audiences that you need to mobilize to influence and inform your primary decision makers. (Hint: These are the audiences that popped up often in Stages 3 through 5.) Next, you must measure these targets against your budget and make the tough choices about which audiences will give you the most bang for your buck. Budgets can be restricting, but they can also help you focus on what is absolutely necessary for you to meet your goals.

The amount of energy and resources you spend should be directly proportional to the importance of each target audience. If at any point you find yourself fixated on moving an audience that ranked fifth or sixth on the list, it is time to make one of those mid-course corrections and re-channel your energy toward the top targets.

When prioritizing target audiences, consider three things:

1. What do you need them to know?
2. What do you need them to do?
3. What do they know and do already?

The answers to these questions will help you determine what kind of audience research is needed. Then, through that research, you can dig deeper with such questions as:

- What do they already know about the issue?
- Are they amenable to the knowledge you want to share with them?
- Where are they likely to hear it? How can you reach them? To whom will they listen?

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- Are they likely to do what you want them to do?
- What would make them more likely to do what you want?
- What obstacles are likely to prevent them from taking action?
- What is your opposition going to say?
- How strong is the opposition?
- What can you do to mitigate the obstacles?

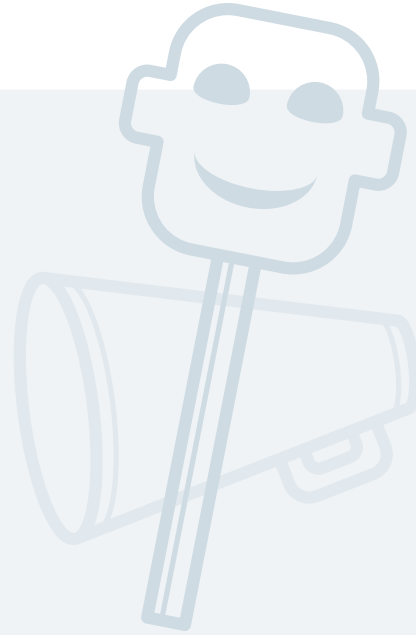
Now, list your priority target audiences and note what you need them to know and do. It is important to note what they may already know and do. That way you don't waste their time, which would lessen the chance they would want to help you.

Your audience research may have implications on your overall strategy. Review Stage 3 again. Does anything from the audience research suggest that you should modify how you plan to achieve your goal? If so, make those changes now.

Your research will also heavily influence messaging in the next stage.

Stage 7

Put a Public Face on Your Campaign



TIP

Not all campaigns need

a high profile. Maybe you are working with a coalition of strange bedfellows that could turn off your diehard supporters. Maybe you want to catch your opponent off guard. Or maybe your decision maker is supportive of your goal but doesn't want a lot of attention. Sometimes you can be most effective when you fly under the radar.

Now that you know what you are trying to do and who can help you do it, you need to solidify your position with a strong campaign presence and core message platform. Many of us have read or heard about campaigns that have worthwhile goals and values but are hidden behind boring or obtuse campaign names and less-than-inspiring core messages. People need to be inspired to join your campaign, and the first opportunity you get to motivate them is with your campaign name. Your campaign name needs to convey your values in a quick and memorable way and make it easy for people to convey those values to their friends and others once they join the campaign. For instance, who doesn't want to say they are part of a "Live Strong" campaign, as the Lance Armstrong Foundation discovered?

It is time to define the part of your campaign that the public will see.

When crafting a public face for your campaign, consider the following:

- What value do you want to convey? For example, the Prosperity Campaign in Miami-Dade County aimed to maximize the number of applicants for the Earned Income Tax Credit. The campaigners could have called the campaign "EITC for Everyone," but that leaves people confused about why they should want EITC. By using the word "prosperity," the campaigners were clear about what they wanted for everyone in Miami: prosperity. This value resonated with people.
- Are you going to be for something or against something?
- Are you aggressive or reassuring? For example, are you "Just Do It" or "Together we can...?"

TIP

Remember that the point of this naming exercise is to build public support. Don't be so creative that you alienate people who don't understand the name, and don't spend tons of time trying to make it spell something so you can have an acronym that is a real word. Once you have a draft name, run it by some target audiences and gather their impressions. Run the name through several internet searches to see if and how it's being used. If you can't come up with a name on your own and your budget allows it, you may want to hire a creative branding firm that does this work all the time.

- What is your basic campaign theme? Your theme is the big picture you want to convey to the audience. Here are a few examples:
 - Protecting something valuable
 - Rejecting something dangerous
 - Renewing something dated
 - Reforming something corrupt
 - Strengthening something promising
- Does your public face help you blunt criticism? Are there any ways in which it exposes you to criticism?
- Is it credible?

Use the information you gathered in Stage 4 (Anticipate Conditions) and Stage 6 (Prioritize Your Target Audiences) to help you answer these questions. For example, if you know that your base of supporters is most likely to mobilize around an aggressive campaign that uses more confrontational tactics, choose this over a more reassuring approach that uses softer tactics.

Let's take a look at efforts to reduce the number of paper catalogs sent through the mail and therefore reduce waste. A group started a campaign to get consumers to sign up to manage their own mailboxes. While the campaigners wanted to reduce the number of unwanted catalogs for environmental reasons, many of the target consumers were more concerned about choosing which catalogs to receive and reducing the amount of junk mail in their box than the environment. Names like EcoMailbox wouldn't get the group very far. The target audience liked to shop and wanted catalogs. The campaigners needed to convey that they weren't against all catalogs, just unwanted ones. They also needed a name that empowered consumers. Based on these criteria, they considered a number of names for the campaign. They decided on Catalog Choice. "Choice" was what consumers were looking for. The name caught on. More than 987,000 consumers have signed up on www.catalogchoice.org to manage their own mailboxes and reduce unwanted catalogs.

Along with a strong name, you need core messages that articulate your campaign platform and are consistent with your overall strategy. You will tailor these main messages for different target audiences, but for starters, you need three to four main messages to motivate people around your issue.

Catalog Choice focused on these four messages:

1. You can simplify your life and help the environment by stopping unwanted catalogs from getting in your mailbox.
2. Have merchants respect your preferences for what catalogs you get at home.
3. Sign up for our free service at catalogchoice.org.
4. Then you'll only get the catalogs you choose to get.

A Name Is More Than Just a Name

In 2001, a local coalition of community organizations and their partners developed a policy screening tool to help ensure that city-subsidized development projects would provide tangible benefits to the community. The policy staff called the tool the “Equity Impact Analysis.” When voters heard the name in pre-launch focus groups, they overwhelmingly disapproved of the policy. Yet voters were very supportive of the “values” behind the policy: they believed that if taxpayers were providing a subsidy for development, companies and developers needed to contribute to the overall good of the community.

The coalition changed the name of the tool to “Community Benefit Analysis,” and voters in focus groups were universally supportive. The new name reflected values that people could connect with and support—and so they did.

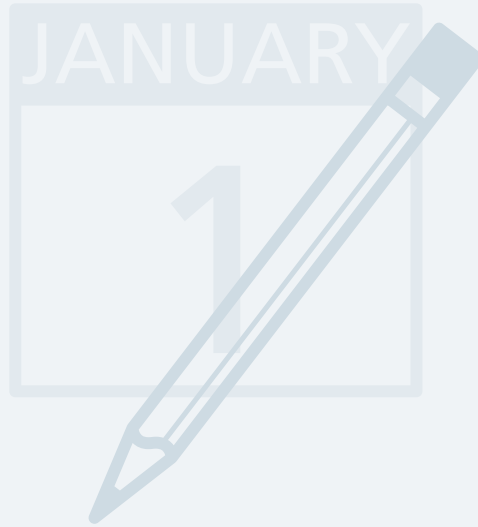
The image shows a 'Planning Tool' interface. It has a sidebar on the left with several menu items, some highlighted in blue. The main area is a grid of boxes. One box in the upper right is highlighted in red and labeled 'Stage 7'. Below the grid are two large empty rectangular boxes for content.

Now, go back to your chart in the *Planning Tool*. Name your campaign and note which four main messages you want to get across. Messages are one of those must-haves. There are specific message resources in the communications section of Stage 8. Look there if you need more help.

This is a good time to check in with your Hard Truth Squad and gut-check your campaign’s public face. Does it pass muster under the Hard Truth test? Does it fit the values you are trying to convey? You may also want to field test it with a small, representative sample of your audience. Your goals may be admirable and your plan solid, but the wrong public face and messages can derail a campaign right from the start.

Stage 8

Operationalize Your Campaign



You know what you want to accomplish and when you need to accomplish it. You have a general sense of how to get there, and you understand who you need to engage along the way. You've determined what main activities to pursue to achieve success, and you have a public face. Now you need to identify and plan the day-to-day tactics you'll need to run a successful campaign.

In the *Planning Tool*, there is a table that includes six main campaign tactics:

1. Intellectual Knowledge
2. Government Relations
3. Mobilization / Field Organizing
4. Communications
5. Coalitions
6. Fundraising

Remember: your campaign is unique. This is not a cheat sheet. These are only examples of the kinds of things you may want to include as you develop your own campaign. You may identify an additional tactic that does not appear here; if so, write it down now. You'll follow the same planning process for all of the tactics you choose.

Once you select which tactics are most helpful to your campaign, you will build these tactics into your operational plan. Two must-haves for the operational plan are timelines and the people who are responsible. Many campaigns have a plan that never gets implemented because there are no deadlines and no one in charge. Nip that problem in the bud by setting deadlines and naming names. For each campaign tactic, you will need to think through each of the following issues. Your answers will inform your operational plans.

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Stage 8	

Summary

List your rationale for the tactic here. Why have you selected this kind of tactic as part of your campaign? What purpose will it serve? How will this tactic help your campaign succeed? For example, if more GOP elected officials and representatives know that Republican voters are supportive of expanding health care coverage for children, they will be more likely to support proposals to do so because they'll know they are acting in line with their base's priorities. For this goal, conducting and releasing a poll of Republican voters would be a valuable activity.

Major Activities

List the main activities you plan to pursue. They should be the ones that you then schedule in the timeline and assign to specific members of your campaign team.

Person Responsible

Does the person you are listing have the right expertise to drive this tactic?
Does he or she have enough capacity?

Measures of Impact

List all the ways you can measure your impact. Consider the following questions:

- What do you expect to happen when you do this activity?
- What would show you it was wildly successful?
- What would suggest it was a complete dud?
- What systems do you have in place or need to put in place to measure the success or failure of a tactic?
- When will you review measurements and make decisions about future actions?
- Who will be responsible for tracking your progress?

Timeline

Once you have detailed each of these tactics, plot them all into a master timeline. Go month by month, or week by week for more fast-paced campaigns. If you are worried about staffing, prioritize tactics as Tier A and Tier B, where Tier A tactics are must-dos and Tier B tactics are things to do if time is available.

TIP

In the appendix, we've provided

some additional tips to consider for the six main campaign tactics, including questions specific to each tactic and examples of the kinds of activities you may want to include as you develop your own campaign.

Remember to Consider Other Critical Factors That Will Affect Your Success

Anticipated Obstacles

What could go wrong? How can you minimize this risk?

Budget Implications


Note how each tactic stacks up against available resources and how much additional revenue you will need to generate as you move forward.

- How much will you spend to make this happen?
- How much staff time will it require?
- Are there anticipated expenses such as printing, ad buys, postage, catering, Web site development and maintenance, or development of promotional and advertising materials?
- Will you need to hire outside help?

Now start filling in the Stage 8 table in the *Planning Tool*. If you have a different person in charge of each campaign tactic, ask each one to fill in the table for the tactic they will manage. Have them review the strategy developed so far and fill in the details for their area of expertise.

Stage 9

Stay on Track



Now that you have laid out a winning strategy and developed a thorough plan for success, it should be a smooth drive toward the finish line, right? Unfortunately, that is rarely the case. The campaign terrain changes constantly, and you need to be ready to adapt to and leverage each new landscape.

Preparing for the unexpected is one of the most overlooked and important pieces of campaign planning. Potholes and road closures may force your plan into a detour, while unanticipated pit stops may bring good fortune and new opportunities. You need to be ready to spring into action, wherever the road takes you.

It is vital to take regular stock of your campaign; do not wait for the post-mortem. Celebrate even small successes and use them to keep your audiences motivated. Note deficiencies and use them to make mid-course corrections. Measurements can be quantifiable or anecdotal, but they should always focus on outputs and outcomes.

Think of outputs as the specific things you will do to move your campaign forward, or the notches on your campaign belt. They are the visible evidence of your plan in action. For example, you can hold a press conference. If you say you will hold two in a quarter, then you have an output to track.

Outcomes are the changes that occur as a result of your outputs. They show that you are pushing your campaign toward its goal. If you hold two press conferences, what outcomes do you expect? Increased favorable media coverage? A certain number of reporters in attendance? Try to put a number on it. For example, your outcome could be increasing favorable coverage by 25 percent or getting 30 reporters to show up. Now you have an outcome you can measure.

Going Nuclear

A wide coalition of groups working on the ratification of the Comprehensive Test Ban Treaty, which banned all nuclear explosions regardless of the purpose or the environment of the test, had been laying the groundwork for the treaty for years. When President Clinton signed the treaty in September 1996, the groups had already planned to carefully coordinate their actions to get the necessary ratification from the Senate. The bulk of the work happened on Capitol Hill, where they conducted the slow business of discussing the merits of the treaty, carefully counteracted negative talking points from treaty detractors, and seeded a steady flow of letters to the editor, op-eds and in-person lobbying visits from citizens in targeted states to push senators in the right direction.

In September 1997, a year after Clinton's signing of the treaty, and while the groundwork of the disarmament community continued moving forward, the White House sent the treaty to the Senate for ratification. Steady progress was being made, including soliciting support from key senators who would be bellwethers for an eventual ratification vote.

This progress hit a significant road block in May 1998, when India and then Pakistan tested nuclear devices, opening the door to a nuclear arms race in an increasingly tense South Asia. The tests were exactly what treaty opponents needed to stymie progress on the treaty; it provided them with an opportunity to cast doubts about the international community's ability to enforce such an agreement. The coalition's timeline was massively disrupted, and they went into emergency mode.

Seizing on this disarray, the GOP leadership scheduled a snap floor vote on the treaty, knowing that the campaign to get the treaty ratified was on the ropes. The ratification vote failed, and the Clinton administration conceded that it would not be possible to bring the treaty forward for a re-vote before the next congressional session.

The only constant is change, and campaigns are no different. Circumstances are likely to change, quite possibly more than once. To account for change, do two things:

1. Hold weekly meetings to keep the trains running on time

Hold weekly or more frequent status meetings to make sure that what the plan said should be happening is happening within the allotted time and budget. Someone needs to be in charge of these meetings. Name a point person early on so that one person is keeping an eye on the big picture and holding people accountable. He or she should call the meeting, go through the plan, and check on the activities that are slated to happen. The person responsible for each activity should provide a status report, offer solutions for any activities that are off track, and commit to what he or she will accomplish and report on the following week.

2. Hold monthly meetings to assess benchmarks

Hold monthly meetings to assess whether the activities are having the planned impact and demonstrating that you are on the right track or whether things are not going according to plan and you need to make a mid-course correction.

Review the benchmarks of success you noted in the operational section of your plan. Hold a status meeting and review these questions:

- What significant developments have taken place since the last status meeting?
- How has the news coverage of the issue or the debate changed since then?
- Have the decision makers, influencers or opponents changed their public positions on the issue or reacted to the campaign?
- Are all of your steps or tactics still valid?
 - If not, what changes need to be made? How will those changes affect the resource budget, the assignment list and the campaign timeline?
- Can your messages be made stronger based on new information?
- Have new voices emerged in the debate that could be engaged as allies or taken into account as possible opponents? In either case, how will these new players affect your messages, objectives and tactics?
- Are there opponents who could become unlikely allies due to a change in their position or a significant development?
- What are specific signs of progress?
- Are there unanticipated signs of success? If so, should these be incorporated into the formal measurements of success?
- Where is the campaign falling short? What can be done to correct it?
- Looking ahead, what challenges are coming next? Are you prepared to meet these challenges? Do you need to make any changes to your plan to take advantage of new opportunities?

Regular status meetings are critical to maintaining your plan as a living, breathing document that helps you run a better campaign. Put the meetings on your campaign timeline, let participants know the meetings are not optional, and send out agendas and meeting information (such as location or a call-in number) in advance. After each meeting, adjust your strategy based on decisions made during the meeting, then circulate the revised strategy to your planning group to keep everyone on the same page.

Assessing Opportunities

Planners should develop a list of criteria to assess opportunities that come up. Your campaign should use these criteria to measure your opportunities, only responding to those that are valuable, strategic and help you reach your goal. Plans often get derailed by opportunities that pop up that are not wise tangents for the campaign to pursue. Remember that while you do want to be opportunistic, you also want to stay on track. The list of criteria will help you do both.

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Sample List

- Is this opportunity a shortcut to achieving one of our core objectives of the campaign?
- What are the reasons to say no?
- What are the reasons to say yes?
- Can this opportunity replace and have greater impact than some of the tactics we have planned now?
- Do we have the staff time and budget to fully leverage the opportunity?
- What could go wrong? Are we willing to risk it?

Write It Down and Use It

The final written campaign plan should be used in meetings to keep everything on track. It should not be put on a shelf and forgotten.

Last Words

Your plan should serve as an inspiration for you and the people committed to the campaign. When you hit hard times, you can look at it and remind yourself that this is how you know you can win. If the coalition starts to drive you crazy, you can look at it and remember what you are fighting for and why compromises are worth it. And if you get lost along the way, you can look at it and find your way back. This is your map. It will take you exactly where you want to go if you follow it.

So what are you waiting for? Start planning your next winning campaign!

Appendix

Here we will explore the six principal tactics of most campaigns in more detail. For each of the specific tactics you've come up with for your campaign, consider the questions below. These questions will help you as you develop your operational plan.

Intellectual Knowledge

Published items that support your goal, such as reports, report cards, fact sheets, score cards, public opinion surveys and executive summaries.

When deciding whether or not to include intellectual knowledge in your campaign—and, if so, what kind—consider the following:

- How will it advance what the audience already knows about the issue?
- Why will this information be credible to the target audiences?
- Is it user friendly?
- Will it cut through the noise?
- What do you expect the information to compel your targets to do?
- What is the shelf life of this information?
- How many different ways can you use this information in the campaign?
- Is it saying something new?

Best Practices

- Consider repackaging disparate information into one central place.
- Make the information as relevant to the target audiences as possible. For example, localize it, translate it into a different language or include scientific data.
- Don't underestimate the power of a good executive summary. It may be the only thing people read.
- Make sure your information is newsworthy.
- Many members of your target audiences may not have an advanced degree on the topic. Write for a lay audience, or package the information differently for different audiences.
- Many people don't read footnotes.¹

Pitfalls

- The opposition will also produce intellectual knowledge. Avoid making the focus of your effort a debate over misinformation. These debates usually confuse target audiences. And they tune out.
- Don't let ego get the best of you. If yours is not the most credible organization to release the intellectual knowledge, go find the group that is.

¹ Or really small print.

- Don't think facts alone will win the day. If people are emotionally attached to their way of thinking, a report is unlikely to change that.
- Polls are valuable, but many will use them to support what they already think, rather than as fodder to change their minds.

More Resources

Made to Stick

<http://www.madetostick.com>

This book by brothers Chip Heath and Dan Heath (both business and marketing experts) helps people make sure their ideas stick. It offers guidance as to what kind of intellectual knowledge is needed and helps people steer clear of "the curse of too much knowledge."

In Other Words

<http://www.emcf.org/pub/otherresources.htm>

Here you will find three publications by language maven Tony Proscio that help organizations use words that will get their point across most effectively.

Presentation Zen

<http://www.presentationzen.com/>

Communications specialist Garry Reynolds' blog centers on issues related to professional presentation.

Polling resources:

American Library Association's Guide to Public Opinion Poll Web sites

http://www.ala.org/ala/acrl/acrl_pubs/crlnews/backissues2006/october06/opinionpoll.cfm

This site provides polling data from around the world. It includes all major polling firms, news and media outlets, and major ongoing survey series.

Data Directory

<http://www.washingtonpost.com/wp-srv/politics/polls/datadir.htm>

The Washington Post publishes this guide to the public opinion data that are available online from nonpartisan organizations. It includes media and national polls, non-profit and academic data, and opinion research by state.

FedStats.gov

<http://www.fedstats.gov/>

This site provides statistics and studies compiled by the federal government. It is searchable by geography, subject and agency, with links to nonprofit agencies and their reports.

Gallup

<http://www.gallup.com/>

Gallup is the most widely known polling and research organization. Its site is searchable by world region and topic.

PollingReport.com

<http://www.pollingreport.com/index.html>

This is an aggregate site of American polling data by issue or current news item.

Public Agenda Online

<http://www.publicagenda.org>

Public Agenda Online is a nonpartisan, nonprofit opinion research organization with both research studies and guides that are searchable by issue or topic.

Roper Center Public Opinion Archives

<http://www.ropercenter.uconn.edu/>

Topics at a Glance gives a brief overview of major research on a range of issues, with links for further information. The site also has sections on polling and opinion research fundamentals.

World Public Opinion

<http://www.worldpublicopinion.org/>

This site provides international polling and opinion research searchable by topic or region.

Government Relations

Engaging elected officials to meet your campaign goals through such things as meetings, briefings and testimony.

Here are some key questions to consider when deciding whether or not to use government relations:

- Do you need policy change or the government's bully pulpit?
- What levels of government do you need to engage?
- Do you need to change a law, or can you accomplish your policy goals under current law?
- How much do policymakers already know about your issue, and why should they care?
- What do you specifically want the policymakers to do (for example, change the definition of "wetland" in a regulation, change the law setting income limits for children's health coverage or increase dropout prevention funding)?
- Will you conduct policymaker education, or will you lobby for specific legislation?
- What relationships do you have with targeted policymakers?
- Is there opposition making the case for the other side?
- What other stakeholders (such as advocates, watchdog groups, service providers and constituency groups) have relationships with your targeted policymakers? Must you plan for their involvement as possible distractions or potential allies?
- What timing considerations (such as legislative calendars, budget timelines and elections) must you take into account when planning to engage policymakers?

Best Practices

- Policy change can take time. Plan for incremental gains, and celebrate every win as an opportunity to recruit and retain policymaker champions. Also, don't wait until the end to reward policymakers. Publicly acknowledge their support with each gain, big or small. That way they will continue to be motivated to devote time and staff to your campaign goals.
- Consider how your interests converge with the targeted policymakers' basic political interests.

For example, elected officials want to get re-elected, and agency officials want to get the mayor, governor, president or other chief official re-elected.

- Voters are the primary audience of elected officials. Make sure your outreach connects the issue with their district.
- Build and value your relationships with staff. They serve as counselors to and gatekeepers for your targeted policymakers.

Pitfalls

- The enemy of your friend may become your enemy. When choosing a policymaker champion, review his or her political opponents, and carefully think through the consequences of making them your opponents as well.
- Beware the other branch. Legislatures generally consult agency officials before changing the laws those agencies administer, and agencies always consider how legislative overseers will react to regulatory changes.
- Know your limitations. Are there legal restrictions on lobbying that could limit your government relations efforts?
- There's no such thing as a free lunch; every policy change will cost somebody something. Policymakers know this well. Anticipate their questions about fiscal impact and costs to businesses, families or other key stakeholders.

More Resources

Center for Lobbying in the Public Interest
www.clpi.org

The CLPI online Training Resource Center offers a wide range of information on nonprofit advocacy and lobbying, particularly legislative advocacy.

Congressional Research Service
http://www.rules.house.gov/archives/crs_reports.htm

CRS provides a large number of reports and guides to help you navigate Congress.

State and Local Government

A wealth of information about state and local governments can be found through the National Governors Association, the National Conference of State Legislators, the U.S. Council of Mayors, the National League of Cities and the National Association of Counties.

Mobilization / Field Organizing

Recruiting, enlisting and activating your supporters through boycotts, rallies, petition drives and endorsements.

To determine whether field organizing and public mobilization has a place in your campaign, consider the following:

- Based on your goals and targets, what key groups do you need to mobilize? Prioritize these groups based on who is the most likely to become engaged and what resources you have available.
- Map your human resources. With whom do you already have relationships that can help you access your target groups? For example, do you have a board member who has access to powerful business leaders? Or do you have an existing partnership with a group that can reach an audience with which you don't already connect?
- How do your target audiences receive their information? How much money and time will you need to invest in reaching them?
- If time is a constraint, what do you most need each group to do?
- How can you make it easy for each target audience to do what you want them to do?
- How can you utilize every opportunity to get your message across? T-shirts, signs and pins at rallies should promote your primary message, not your name.
- Can you do a grasstops campaign (with a focus on opinion elites) rather than a grass-roots campaign?
- Do you truly need to do a public campaign, or is it possible to move key players behind closed doors to meet your goal?

Best Practices

- Start with the positive. People respond more effectively to messages that start with a positive, shared value and then make a call to action.
- Practice consistency. You want everyone to think the number of supporters for your issue is significant. You can create this perception by ensuring that everyone who is speaking about your issue is saying the same thing—again and again.
- A few very squeaky wheels can make a lot of noise. Sometimes just a few people instead of a huge crowd can accomplish your goal. Many advocates on conservation issues provide compelling examples of how “small and devoted” activists often out-trump “large and occasional” activists.

Pitfalls

- Avoid all references to “the general public.” This is especially critical for field work. You cannot reach everyone. Being focused and deep will yield much stronger results than being broad and thin.
- An ad campaign is not the best way to mobilize all target audiences. Many people respond more positively to an “ask” from a specific person or other audience, such as their minister, their teachers or their peers. Direct, person-to-person outreach is often more effective than even the best ads. Make sure you have the human element first, and consider the ad campaign as *enhancement* of rather than a *replacement* for that effort.
- The best messenger isn't always you. Think hard about who is best able to reach your target audiences. Your audiences may listen politely to you, but be realistic about who they look to as genuine validators who can

Squeaky Wheels Get Health Care

Three groups of people get government health care under Medicare: the elderly, the disabled and people with end-stage liver disease. Why end-stage liver disease and not cancer, which affects more people? The ESLD people ran a better campaign.

persuade them that something is truly in their best interest. Is it an ally? Is it one of their peers? How will you engage that messenger?

- Web sites can be great resources and tools to support your campaign, but do not forget the human face of peers who will actually motivate people to act. Get the human messengers first, then add the tools that best support their efforts.

More Resources

Acitvation Point™
www.activationpoint.org

Spitfire Strategies conducted this research on the best practices for planning for persuasion, tailored to the unique needs of social change organizations.

Organizing for Social Change
www.midwestacademy.com/academy_manual.html

Now in its third edition, this 425-page manual covers every aspect of direct action organizing.

Communications

All the different vehicles you can use to promote your messages with the public, such as media, blogs, paid ads, Web sites, email, social networking, meetings, events, printed materials, rapid response efforts, conferences and spokespeople bureaus.

Nearly every campaign uses some traditional communications tactics. How can you decide what to use and when? Consider the following:

- What main messages do you need to get out? To whom?
- Who are the best spokespeople to get the message out?
- Which channels (such as one-on-one meetings, earned media or the World Wide Web) have the most impact with your target audiences?
- What will the opposition say, and how will you respond?
- Will you need to set up a rapid response system?

Best Practices

- Segment target audiences. The narrower the better.
- Field test different communications vehicles, and put your money behind the ones that are the most promising.
- Communications activities should hit target audiences a minimum of three times through different channels; for example, through email, in person and through media coverage.

Pitfalls

- Don't go after the general public. When you target everyone, you are targeting no one.
- Some communications vehicles offer less control over your message than others. For example, with paid ads, you control the message. With earned media, the reporter selects the message. Make your choices carefully, and have plans in place for doing damage control if needed.
- Repetition is key. If you can't afford to repeat your message, find another activity.

More Resources

Smart Chart™ 3.0
<http://www.SmartChart.org>

This interactive tool by Spitfire Strategies helps nonprofits make smart communications choices.

Andy Goodman
www.agoodmanonline.com
http://www.agoodmanonline.com/bad_ads_good_causes

Andy Goodman is a communications guru who has produced a number of publications that help nonprofits communicate more effectively, including the book *Why Bad Ads Happen to Good Causes*.

Advocacy 2.0
http://www.advocacy2.org/index.php/Main_Page

Advocacy 2.0 is a collaborative resource for activists that covers all aspects of communicating with and organizing networks of people.

Getting to the Point
<http://www.nonprofitmarketingblog.com>

Marketing expert Katya Anderson's blog helps nonprofits learn from the secrets of corporate marketing.

The Influentials: One American in Ten Tells the Other Nine How to Vote, Where to Eat, and What to Buy

Consumer behavior experts Jon Berry and Ed Keller teach you how to identify and leverage the “influencers” of your target market.

NetCentric Campaigns

<http://www.netcentriccampaigns.org/trainingcenter>

This Web site provides resources about using online content and technology to help empower progressive social change makers.

Purple Cow

Marketing expert Seth Godin’s book tells you how to transform your business by being remarkable.

Whoever Tells the Best Story Wins

Storytelling diva Annette Simmons’ book explains how to use your own stories to communicate with power and impact.

Coalitions

Other organizations and allies who support your mission, goal or objective.

Coalitions come with their share of challenges. However, they also offer the benefits of shared resources, expanded reach and a louder voice.

Think through these points as you evaluate whether a coalition is right for your campaign:

- What are the likely advantages of partnering with another organization? Possible advantages include:
 - additional resources
 - training opportunities
 - enhanced capacity
 - wider audience for your message
 - more open doors
 - more thoroughly vetted work
 - new funding opportunities
 - diminished likelihood of duplicated effort
- What are the likely disadvantages?
 - turf wars
 - mismatched risk tolerance
 - disparate views on key concepts like goal, strategy or theme
 - competing priorities
 - diluted goals
 - wasted resources

- Are you willing to subject your process of goal-vetting and strategy creation to members of the coalition?
- Is it possible to structure the partnership to maximize the coalition’s efficiency and minimize turf wars?
- Think about what the other people in the coalition want and need. What are their assumptions? What are their must-have results from this campaign? Will you need to give up anything or compromise with them so that everyone gets what they want out of the coalition?
- Can you develop a system for working with the coalition to revisit the goals, strategy or theme throughout the life of the campaign in order to manage disagreements and turf wars and keep the campaign moving forward?

Best Practices

- From the onset, communicate—consistently and frequently—your understanding of the campaign’s goal, strategy and theme, as well as who the targets of your work will be.
- Grow your coalition only as necessary to accomplish your work. Involve members early on to avoid re-opening settled discussions with the introduction of new members.
- Assign responsibilities based on the strengths of your coalition members, and maintain clear and frequent lines of communication inside the coalition. Consider investing in some labor-saving tools to keep members connected and on track.
- Collaboratively create coalition principles for the members to ratify. These principles should cover important coalition “sticking points” like majority rule versus rule by consensus, how new members are added, how any shared funds are handled and how leaders inside the coalition are identified.
- Consider building an internal set of benchmarks that shows the way to success. Assign progress reporting on these interim goals to a member of the coalition.

Pitfalls

- Despite how attractive a 100-member coalition may look on paper or to some funders, it is more helpful to manage your coalition's size relative to the tasks at hand and the different actors needed to accomplish those tasks.
- Push groups to endorse your goal and strategy from the beginning. Coalitions without a strong sense of shared purpose will often limp along and then splinter when the hard work starts. With strong shared goals from the beginning, you're ready for the heavy lifting when the time comes.
- Check in with your coalition members to make sure they feel they're getting adequate information—not too much and not too little—about the campaign's progress. Consider doing an anonymous survey of your coalition partners.
- Coalitions often lose vital time responding to crises, unplanned events or new developments around their issue. Determine an action plan for rapid response, and make sure everyone is aware of what will happen if they don't respond in a timely fashion.

More Resources

Advocacy for Impact

http://www.gii-exchange.org/web/file_upload/advocacy%20for%20impact.pdf

This site gives insights from six bold advocacy campaigns that structured and used coalitions to get results for their work in global poverty reduction and health promotion.

Continuous Progress

<http://www.continuousprogress.org>

Continuous Progress provides evaluation tools for advocacy, including guidance on coalition management and health for funders and advocates.

Institute for Sustainable Communities: Coalition Resources

http://tools.iscvt.org/advocacy/empower_the_coalition/start

The institute offers a variety of tools for empowering, managing and making the most of your coalition.

Fundraising

Often campaign goals are bigger than campaign coffers. If your budget is making it difficult to move forward with an important tactic or to reach a key target audience, you may have to prioritize. To determine whether you should fundraise—and if so, how—ask yourself the following questions:

- Can you absolutely not achieve your goals without these funds?
- Does your organization already have a fundraising apparatus you can tap?
- In your audience research, have you identified some potential angels who may help finance your efforts?
- Are there IRS restrictions that prevent you from raising funds for this campaign?

Best Practices

- Different kinds of fundraising require very different strategies. The most common “flavors” of fundraising are small gifts (usually less than \$500 or \$1000 and often much less than that), major gifts from individuals, foundation grants and corporate grants. Do a little homework and figure out which flavor best matches your organization's needs and assets.
- In any case, the best way to raise money is via peer-to-peer solicitations by other donors to your campaign. It is far easier for them to sell you than it is for you to sell yourself.
- Tell a great story. One compelling story is more persuasive by far than a long presentation full of facts and figures. When fundraising from individuals, drop the “foundation speak.” Things like your “theory of change” will make individual donors' eyes cross.
- Be prepared to answer the following questions:
 - What exactly are you going to do with the donation?
 - Why will the donation make a difference?
 - What percentage of donated funds go to program activities, as opposed to fundraising or administrative activities?
 - How will you measure success?

- Plan for a communications cycle around fundraising. Your job is not over when the donation comes in. You owe that donor a thank you message—and for some gifts, two or three thank you’s would be appropriate. Don’t expect a follow-on gift until you have reported back; that donor will want to know what you did with his or her previous donation. Donor cultivation is the key to a productive, long-term relationship.

Pitfalls

- Don’t succumb to magical thinking. Thinking that the perfect donor is going to somehow appear and pay all your bills is a common fantasy, but it’s just that. An equally common fantasy is that there is some shortcut to replace the hard work and long hours it takes to raise money. Technology companies have made a lot of money fueling this fantasy, so be watchful in picking your fundraising means.
- Materials should not contain too many facts and not enough emotion. Fundraising, especially from individuals, is about vision, passion and emotion. Sure, you need to be persuasive and make your case, but the facts and figures should be brought to life through flesh and blood stories.

- Don’t get impatient. Raising money takes time. Often a major donor will only give after the eighth or ninth time you have communicated with him or her. It might take a year. And you never make the ask on the first visit.
- Be sure to make the ask, when it is time. Don’t use weasel language like “support us” or vaguely indicate how more donations would help. Make it clear you are looking for a “DONATION” or a “GIFT.” Give the donor prospect an idea of how much you are looking for. Being shy or vague when it is time to ask may doom your prospects.

More Resources

Fundraising 1, 2, 3

<http://www.fundraising123.org/>

Network for Good provides this learning center for fundraising.

DonorPower blog

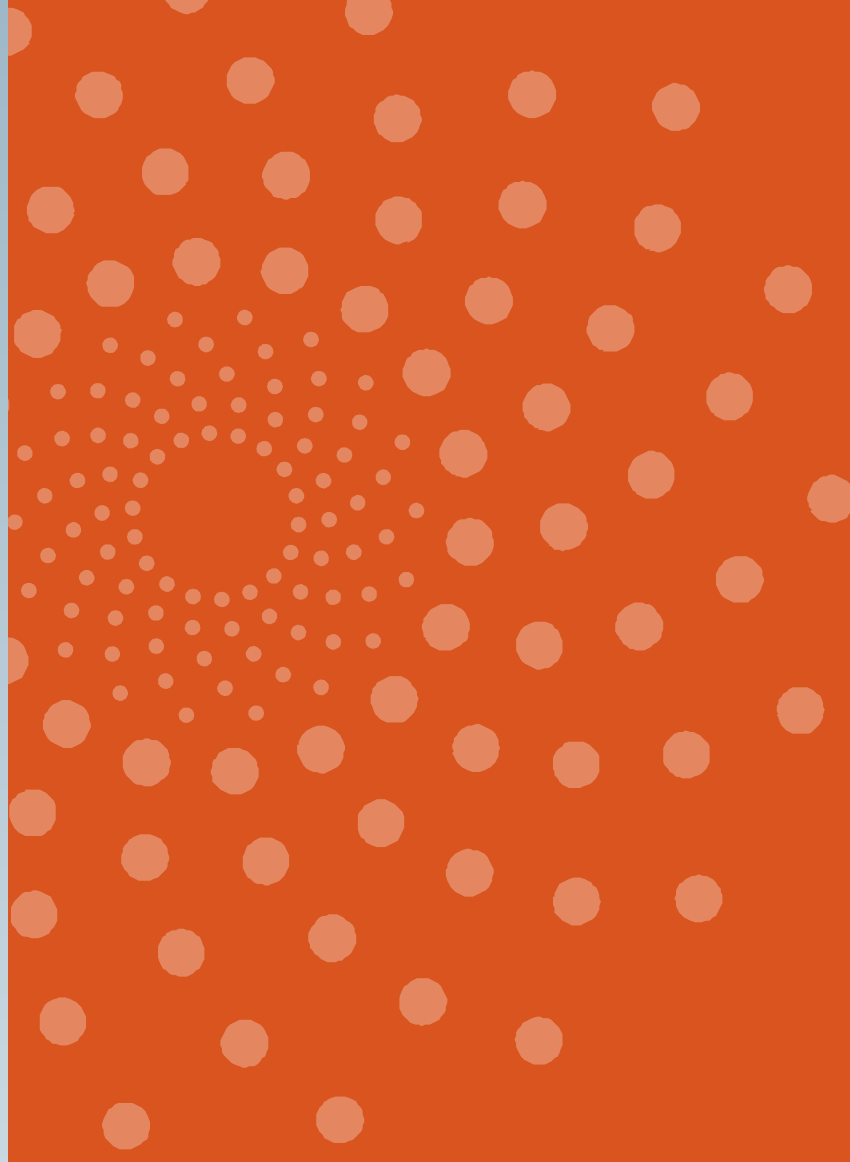
<http://www.donorpowerblog.com/>

Blogger Jeff Brooks provides fundraising advice from the donor’s perspective.

Fundraising Success Magazine

<http://www.fundraisingsuccessmag.com>

This monthly magazine is chock full of fundraising strategies and expert advice.



www.justenoughplanning.org

Communications Leadership Institute
www.communicationsleadership.org

Spitfire Strategies
www.spitfirestrategies.com