Campaign Strategy Planning

a guide for to conceive a campaign

this pedagogical material is free for internal use and exclusively for training, and should not be reproduced
Name of your campaign

Campaign description:
Describe your campaign in a 100 words or less
1. **Goal**

The over-arching vision or big picture change that winning your campaign will contribute to.

2. **Issue**

An issue is part of the problem and part of the solution.

3 useful criteria to select an issue are:

(1) does it have flow on impact; (2) is it broadly and deeply-felt; and (3) is it winnable?

3. **Objective**

Write your objective in a SMART format:

Specific and strategic in the sense that it supports your campaign objective;

Measurable,

Achievable (doable);

Realistic (within your group/organisations capacity);

and, Timebound.
4. **Decision-maker/Primary target**
   - The institution, person (or sometimes people) who can give you what you want.

5. **Secondary target/s**
   - Person or people or who can influence the primary decision-maker.

6. **Theory of Change Statement**
   - If we do [activities/approach] then [change/outcome will occur] because [reason/logic].
7. **Forcefield Analysis**

What are the forces for and against your campaign objective? A forcefield analysis helps to think about forces affecting the movement. Forces can include political, economic and cultural factors. It can help us decide where to focus our energy during the campaign, and to anticipate obstacles.

<table>
<thead>
<tr>
<th>Forces AGAINST change</th>
<th>Forces FOR change</th>
</tr>
</thead>
<tbody>
<tr>
<td>make it hard to achieve your objective</td>
<td>make it more likely to achieve your objective</td>
</tr>
</tbody>
</table>

8. **Sources of Power and Pillars of Support**

This is useful if you are facing a very powerful decision-maker who is part of the government and you need to organise and mobilise people power to influence their decisions. Which key social groups and institutions supply what sources of power (political and legal legitimacy, human resources/workers, particular skills and knowledge, money and infrastructure, beliefs, fear of sanctions/security forces). Identify the key pillars you will focus on shifting/undermining/or ‘neutralising’ and the social groups you want to pull over to your side.
9. **Power Map**

Identify campaign influencers, allies and other stakeholders and the relationships between them.

10. **Critical Path**

A critical path identifies one or more pathways to achieve broader goals or discreet campaign objectives. The more concrete and achievable the objectives are, the easier it is to develop a critical path that can then serve to guide. Think of each step on your critical path as smaller changes. Revisit your critical path regularly.

11. **Organising Statement**

I/We are organising (who) to do what (our campaign goal or a smaller change/outcome in our critical path) by when and how (tactics and timeframe)
12. Tactics

Tactics are the social action activities that you use to achieve your goals and objectives. Your strategy is the sequencing of these in a logical and high impact way. List and describe the tactics required to achieve each campaign objective. Decide which tactics will deliver the greatest impact. Think about what tactics are needed to achieve each of the smaller changes that are part of your critical path. Revisit these regularly.

13. Tactics criteria

Develop and agree on a set of criteria to assess potential. These criteria were adapted from a set developed by the Midwest Academy:

- Can you really do it? Do you have the needed people, time and resources?
- Do your tactics escalate over time? Is it within the experience of your own members and are they comfortable with it?
- Can lots of people participate in it? Is it focused on either the primary or secondary target?
- Does it meet your organisational objectives as well as your campaign objectives? Do you have enough leaders experienced enough to do it?
- Will it play positively in the media? Does it put real power behind a specific demand?
- Is it outside the experience of the target? Will people enjoy participating in it? Does it reflect/embody your values and vision?

What criteria will you use to assess and prioritise tactics?
## Communication strategy: key messages

<table>
<thead>
<tr>
<th>Key message</th>
<th>What are the killer facts (ideally backed up by a reputable source) which support your message (three maximum)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. (for example) If we enact this blueprint today, Vietnam will need to construct no new coal-fired power stations</td>
<td>1.</td>
</tr>
<tr>
<td>2. (for example) Switching to clean energy will save lives and money in Vietnam</td>
<td>1. Coal is a primary cause of air pollution. The WHO states that air pollution kills ** people a year in Vietnam</td>
</tr>
<tr>
<td></td>
<td>2. According to Bloomberg, the cost of renewable energy has dropped by &amp; in the past 5 years.</td>
</tr>
<tr>
<td></td>
<td>3.</td>
</tr>
</tbody>
</table>
Circles of Commitment

How are you building participation in your campaign?

Who is in each circle?

What do they do? What is going well with this current allocation of tasks?

Is there anything you feel needs to be done differently that would improve the effectiveness of the campaign?

Think about your ‘core’ for a moment.

Are there tasks currently being undertaken by the core that could be done by people who are committed?

What about the people in the other circles?

How might they be encouraged and supported to be more involved?
Do your timeline

A good and detailed timeline is crucial for a good campaign.
Milestones are important. Milestones are a way of knowing how the project campaign is advancing, especially the tasks being executed. They symbolize an achievement, or a point of time and offer the possibility to correct what’s preview, if need, to mobilise more or less resources, to identify risks, etc.
CAMPAIGN PLANNING PRINCIPLES

CAMPAIGN PLANNING PROCESS

A. Research
- Identify your vote
- Poll-by-poll analysis
- Socio demographics
- Local issues
- Opponent

B. Voter Contact
- Targeting base
- Voter identification
- Canvassing

C. Budget & Fundraising
- Limit is small
- Fundraising plan

D. Organizing Volunteers
- Fill key positions

E. Scheduling

Campaign Plan
- Pre-election research and analysis
- Campaign goal:
- Analyze & target voters
- Develop message
- Develop plans:

Rules
- Add/customize your own rules too!
- Write it down!
- Know your win number
- Anticipate Murphy’s law: Things will go wrong
- Be flexible

Analysis/Planning/Action/Impact

Evaluations are important!
- What went well?
- What would you do differently?
We don't build hope, we build futures.