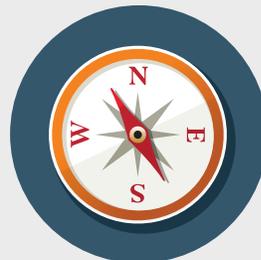


# PLANNING TO WIN™

The Just Enough Guide for Campaigners

SIX STAGES TO A ROCK SOLID CAMPAIGN PLAN



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### Welcome Letter

In the face of a rapidly changing world, even the savviest nonprofits and foundations needed a boost to keep up and win their issue campaigns. Recognizing this, in 2008 we set about gathering insights from dozens of strategists, who knew more than a thing or two about winning campaigns, and packed as many real-life lessons as we could into the Just Enough Planning Guide.<sup>®</sup> Since then, hundreds of nonprofits have used this roadmap to put successful campaign strategies in place.

Fast-forward six years, and we've entered a brave new world.

Facebook can now turn red across the country as the Supreme Court upholds marriage equality. Extreme partisanship requires new thinking to build bridges and move issues. Social and traditional media offer unprecedented ways to share information and mobilize people — but, if misused, also carry a risk of making people tune out. Campaigners are increasingly turning to sophisticated research and scientific insights on how people think and make decisions to inform successful engagement strategies.

With all of these new factors affecting what it takes to design and run winning campaigns, our campaign planning tool needed an upgrade. The newly titled Planning to Win<sup>™</sup> offers a more streamlined process than its predecessor and is packed with new insights and examples to help you navigate today's campaign playing field. We've designed the tool as an online resource and organized it so you can either move through it quickly or dig deep, depending on your needs. You can even access the tool via your mobile device and choose the level of detail you want to

export, from a top-line document for your board to a detailed tracking system for your campaign team.

Use this tool to achieve your next policy win, get a lot of people to do the right thing or motivate corporations to adopt policies that help make things better. Whatever your ambitions, Planning to Win will take you from vision to reality.

It took an incredible amount of help from some of the best campaigners around the country to put this campaign planning tool together. We are incredibly grateful for the wisdom, insight and from-the-trenches stories they shared to bring this guide to life. We want to extend a special thanks to the people listed on the next page for contributing their valuable time and expertise.

To ensure this remains a living tool that is continuously updated and improved, we need your help. As you use the guide, please share your tips, resources, campaign outcomes and case studies either at [www.planningtowin.org](http://www.planningtowin.org) or via an email to [planningtowin@spitfirestrategies.com](mailto:planningtowin@spitfirestrategies.com). We'll feature them on the site so others can learn from those who are on the ground making change happen.

We look forward to hearing from you and seeing your many successes.

Best of luck!

Kristen Grimm  
President, Spitfire Strategies

Barry Gold  
Program Director, Marine Conservation,  
Gordon and Betty Moore Foundation

### Acknowledgements

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We also want to thank all of those who brought Planning to Win to life. Whether it was participating in an interview, attending in-person meetings, reviewing multiple drafts of content, sharing examples of campaigns that have worked (or not) or testing the online site, the following campaign experts and researchers made Planning to Win a stronger tool for everyone to use:

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### Updates in the New Version

Welcome to Planning to Win: The Just Enough Guide for Campaigners, v2.0. Based on feedback from users like you, as well as guidance from top campaign experts, we've made the following improvements. Some are available in this print guide while others are offered on our online tool at [www.planningtowin.org](http://www.planningtowin.org).

- **Streamlined the process.** We've reduced the number of steps it takes to plan your campaign—so you can focus more energy and resources on actually launching it!
- **Enhanced the online tool.** Our new site is mobile-friendly, so you can access it and update it while you're on the go. Pick the level of detail that works best for you, and download a plan that matches your needs. You can even export your plan to Google Docs so that you can share it — and any updates — with the entire team, in real time.
- **Made it more user-friendly.** We've added simpler checklists and Notepad space to the online tool to help you think through each section of your plan with your colleagues, allies and stakeholders. It will make it easier to share ideas with others, and help make sure nothing slips through the cracks.
- **Offered more help on running successful coalitions and opposition management.** The online tool has two special sections filled with tips that will help unify multiple voices—and help you prepare for the opposition before it strikes. We also added ideas throughout the tool to help you infuse smart digital strategies along the way.
- **Included more robust, best practice examples.** Version 2.0 features case studies of the best and brightest campaigns from recent years, as well as tips for replicating those success stories within your own organization. Many of those are found throughout this guide, while additional examples are available online.
- **Put the latest research at your fingertips.** Throughout the online tool, you'll have the option of digging deeper into specific areas with tip sheets, case studies and other resources that will help you address unique challenges. We'll also update the research and examples over time, so you always have exactly what you need to put a winning campaign in place. Moving forward, we'll showcase new intel and insights from other great campaigns. You can also recommend new research for us to feature or share your own campaign wins online using the Toolbox feature.

## ABOUT PLANNING TO WIN

### Using the Print Guide

**Planningtowin.org** is an interactive, online tool that will allow you to build a strong campaign plan for your effort. It provides a deeper dive into campaign planning with additional guidance, resources, case studies and tools.

The online tool will also allow you to create:

- A **full, customizable plan** that outlines all of your strategic decisions.
- An **overview** that you can share with allies, board

- members or others who need a quick summary.
- A **management chart** that will help you keep track of tactics, assignments and deadlines as you implement your plan.

For those that prefer to have a hard copy of the guide's core content for reference, we have also created this print version of Planning to Win. If you prefer to work outside of the online tool, this guide will also allow you to create a short campaign outline using the included worksheet.

Throughout the printed guide, we've indicated places where you can fill in the worksheet by prompting you with this icon:



We've also indicated places where additional resources are available online with this icon:



### Our Promises

The goal of Planning to Win is simple: We want to help you craft a successful campaign strategy. With that in mind, we stand by three Planning to Win promises:

**1. We didn't make this up.** We've studied and led dozens of campaigns, some we've won and some we've learned from when we lost. We've asked bona fide experts who have won a campaign or two (and lost others) to describe what they have found are the most critical planning elements—the must haves rather than the bells and whistles. Everything we've learned is shared here.

**2. We left plenty of room for flexibility and creativity.** This guide doesn't constrain the creative process; rather, it organizes your

creativity in a way that channels your best and smartest ideas to help you achieve your campaign goals. It lets you build your campaign your way.

**3. We kept it as simple as possible.** We know that a successful planning guide can't burden you with so many steps that you start asking, "Are we there yet?" We'd much rather help you on your way, not get in your way. So, by the time you finish Planning to Win, you'll have a customized plan that you can put into action right away. Best of all, you'll have proven tips and tools at your fingertips — along with enough energy left over — to cross the finish line.

Sound good? **Great, let's get started.**

### The Planning to Win Process

Planning to Win organizes the process of campaign planning into six stages. During each stage, you will answer a series of questions that will help guide your decisions. We'll also offer a variety of ideas and examples, but the decisions are ultimately yours to make. There is no such thing as a one-size-fits-all campaign model. Look to the examples for inspiration, not for hidden answers.

The key to good campaign planning is to start with the core elements and then add layers. This guide will lead you through a logical planning process so each decision builds upon the next.

The six stages to successful campaign planning:

- 1. Defining the Victory:** What's your goal? What kind of campaign should you run? Why you? Why now?
- 2. Evaluating the Campaign Climate:** What are your greatest assets? What are the opposition's greatest assets? What challenges do you face? Consider the good, the bad and the ugly.
- 3. Charting Your Course:** What path will you take to win?
- 4. Choosing Your Influence Strategy:** What decision maker are you trying to reach? Which audiences or constituencies do they listen to? How can you influence them to act?
- 5. Messaging for Impact:** What are you going to say? Who is going to say it?
- 6. Managing the Campaign:** How are you going to put the plan in motion? How will you know if you're on the right track or if a course correction is needed?

### Who Is This Guide For?

If you are looking to win support for an issue, impact policy, or get a corporation or government body to change its policies, this guide is for you. This guide is designed to work best with issue campaigns, policy campaigns and corporate campaigns. It could also help you with another type of campaign, like fundraising or long-term perception change campaigns, but we chose to focus on the types of campaigns mentioned above to make the tool more concise.

### What Is a Campaign?

A campaign is a set of coordinated strategies by a group of people designed to influence a decision that you either win or lose. More specifically, a campaign features:

- **Coordinated strategies.** Campaigns often need multiple strategies working in concert to increase the chance of success.
- **A group of people.** Campaigns require multiple people or organizations working together to achieve a shared goal.
- **A decision.** Campaigns need a clear end goal that influences your decision makers to make a choice.
- **A clear result.** When a campaign is over, you know if you've won or lost.



### Why a Campaign? Why You? Why Now?

As you begin your campaign journey, remember this: Smart campaigns rarely follow a straight road. There are forks, roundabouts and U-turns. But at each intersection, a good campaign plan will tell you which path is best. In Stage 1, we'll walk through the big decisions that will help prepare you for every contingency along the way to victory.

This is also a good point in your campaign planning process to assemble a planning team, if you haven't already. Check out the info below for help in deciding who belongs on your campaign team. Throughout the planning process, we'll recommend when it will be helpful to get their input.



#### Build Your Planning Dream Team

Good planning takes good teamwork. Building a team of people to develop your plan should be one of the first things you do. To identify the right people for your team, it's important to be clear about the roles that different people will play throughout the process.

The planning team should include:

**Campaign Leadership.** These are people who make final campaign decisions. They won't be part of every step of the planning process, but they need to weigh in periodically and make the tough calls.

**Hard Truth Squad.** Members of this squad don't have a horse in the race. They will be your unbiased sounding board—for your goal and your plan—and will tell you where the weaknesses are, what doesn't add up or what doesn't make sense.

**Input Givers.** Everyone needs a devil's advocate, and in this case, you'll need people inside your organization or coalition whose opinions you can seek, but who understand that what you do with those opinions is up to you. They know that you value their ideas but recognize that their contributions are not the final word.

**Buy-in Providers and Doers.** These are your worker bees. They believe in your plan, and they're ready to throw their support behind you when you need it. They're also the people who will be in the trenches, making the campaign happen, so be sure to check in with them regularly. You need to know early on if a strategy or a decision needs to be reconsidered—either because it could negatively affect buy-in or because it may not advance the campaign.

Put your team in place, and consult with them often—they are critical to helping you avoid blind spots in your campaign that can derail even the best of plans.

## STAGE 1: DEFINING THE VICTORY

### Sample Campaigns, Wins and Milestones

Inspiration for this early stage of planning can be culled from real-world campaigns. Here are just a few examples for you to keep in mind as you start the process.

Type of Campaign	Campaign Win	Example Milestones
Corporate change	Mattel agrees to voluntarily stop using rainforest trees for toy packaging	<ul style="list-style-type: none"> <li>• Mattel meets with advocates and alternative packaging suppliers within a year</li> <li>• Three months after meeting, Mattel signs commitment announcing plan to remove rainforest-based products from its supply chain within five years</li> </ul>
Behavior change	50 percent of Pinellas County, Florida residents report an increase in the amount of exercise they participate in weekly	<ul style="list-style-type: none"> <li>• 10,000 residents find nearby activities through county's mobile app in year one</li> <li>• Major local newspaper embeds app onto website home page during first three months of year two</li> <li>• Pinellas County commissioner publicly commits to being more active to help the county get healthier in year two</li> </ul>
Executive Order	President signs an Executive Order to stay the one-year bar for immigrants to apply for asylum	<ul style="list-style-type: none"> <li>• Campaign secures a meeting with the President and a group of immigrants to discuss the detrimental effects of the arbitrary deadline of filing for asylum</li> <li>• President receives a sign-on letter from more than 1,000 organizations urging him to sign an executive order</li> </ul>
Legislative (state)	State legislation bans assault weapons and large-capacity magazines	<ul style="list-style-type: none"> <li>• Three champions in statehouse co-sponsor bill before first recess</li> <li>• Bill passes in state assembly and moves to state senate by second recess</li> </ul>
Regulatory	USDA issues strong nutrition standards for foods sold in vending machines, school stores and cafeteria a la carte lines	<ul style="list-style-type: none"> <li>• Retired senior military officials champion strong standards, arguing today's epidemic of childhood obesity is a recruitment challenge and national security threat</li> <li>• 90,000 public comments submitted to USDA in support of promoting healthy options for school foods</li> </ul>

## STAGE 1: DEFINING THE VICTORY

### Define Your Campaign Win

Take a moment to think big.

Then, make sure your planning team is in agreement on the core goal or goals.

Getting buy-in and agreement at the earliest stages is particularly important when you are working with a group of people or organizations with different priorities. For example, following Hurricane Sandy in 2012, a group of nonprofit organizations in New Jersey put together a campaign to influence how to spend the state's federal recovery funds. The first decision that advocates had to agree on was the big-picture change they wanted to achieve. They determined that they would have the most impact if they focused on three core areas of rebuilding — fair housing settlements; environmentally sound, long-term planning decisions; and transparency in the process.

In the initial planning stages, it was critical that each organization supported all three principles so that instead of competing with each other, they were promoting their collective work. After they had agreed on shared goals, they next had to determine the type of campaign that would enable them to reach these goals (i.e., should they try to direct funding in support of these goals through the governor's funding plan, through the federal agency distributing the funds or by trying to engage state agencies around regulation change?).



As you think about your campaign and what you want to achieve, make note of your long-term goal(s) on your worksheet.

Now, visualize a win. What type of campaign will best help you achieve this goal? For some, this is an easy answer (e.g., a legislative bill is introduced

### The Credit Card Campaign

In 2009, a group of consumer advocates waged a campaign to stop credit card companies from engaging in deceptive practices designed to drive up users' debt. This included things like charging consumers unexpected, excessive fees and changing interest rates without reasonable cause. While advocates were clear on their campaign goals—to get major cards to adhere to a specific set of standards that would eliminate the most harmful practices—they were torn on the best approach to reach their goal.

Initially, advocates considered a corporate change campaign that would encourage credit card issuers to voluntarily offer cards that adhered to the high standards they desired. To be successful, they would need to build trusted relationships with credit card company executives while also building vocal consumer demand for an improved product. While this approach provided a possible path to success, advocates were concerned about their ability to drive enough widespread consumer demand with their available resources to motivate credit card companies.

At the same time that advocates were exploring voluntary corporate standards, Congress was becoming increasingly vocal about the need for greater financial regulation. By focusing all of their energy behind one bill that had a chance at passage, rather than diffusing efforts between multiple individual companies, advocates were able to keep their arguments focused, as well as garner enough attention through paid and earned media to influence key targets. The result was the Credit Card Accountability Responsibility and Disclosure (Credit CARD) Act of 2009.

## STAGE 1: DEFINING THE VICTORY

and you want it to pass, therefore you'd proceed with a policy change campaign).

For others, there may be several paths that could lead to victory: You could advocate for new legislation, or you could convince a corporation to change its behavior. Take a look at the Credit Card campaign case study to see one example of how a successful campaign made this decision.



If you have already identified the type of campaign you want to run and defined your campaign win, write it down on your worksheet. Make sure the definition of your win is specific and actionable (such as overturning the Defense of Marriage Act or convincing a school district to serve local food in schools.) This is a big decision that will impact every phase of your campaign, so get members of your campaign planning team to weigh in. Your Campaign Leadership will need to be on board, and this may be a good place for your Hard Truth Squad to weigh in with strengths and weaknesses of different proposed approaches.

If you need help deciding what type of campaign will best fit your needs, think about what goal you want to reach, then identify the paths you could take to achieve it. Can you go to consumers directly to encourage them to change their behavior, or do you need to convince a corporation to be more responsible? Can you get what you want by passing legislation or convincing an agency to change its regulatory policy? Could you win by getting multiple local governments to take action, or do you need state or nationwide policy change to achieve victory? List all the paths to a win on your worksheet.

Then, use your worksheet to determine which path to a win is most likely to result in success by answering the following questions:



### 1. Which path is ripest and ready to move?

Is your issue likely to come up before your local city council in the near future? Has a business practice recently caused the community harm? Does polarization in Congress or your state legislature mean you are more likely to succeed with another type of campaign?

### 2. If a path has previously not succeeded, can you clearly identify why you think you can win now?

Have you done your history homework? What worked, and what didn't, in past campaigns that focused on your issue?

### 3. Are there clear milestones that will build momentum?

All change starts small. Does your path allow you to build momentum for your broad goal by creating clear, incremental successes along the way?

### 4. Which path has the fewest complications and assumptions?

Does your path require 15 steps to get to victory or only three? Are you unsure of the path you'll need to take, causing you to guess along the way?

### 5. Which path are you best suited to take on?

Do you have relationships with policymakers or business leaders? Do you partner with community organizations that can drive behavior change? What resources would you need for each? With which are you best suited to succeed?

## STAGE 1: DEFINING THE VICTORY

**6. Are you prepared for the ramifications of a loss?** Will a loss using a particular path make it more difficult for you to win in the future? In the event of a loss, can you make it a strategic loss instead of just a setback? Is there a path that better sets you up for future campaigns by increasing your political capital, increasing your supporters or building champions? Once you've determined the best path to pursue, write it down on your worksheet.



**Check-in Point:** After you list the potential paths to a win, share it with your planning team. Have your team help you think through the pros and cons for each path using the questions on this page.

**Note:** If you entered a policy change campaign for your win, be mindful of federal and state lobbying law restrictions. Take a few minutes to review the Knowing Your Limitations tipsheet below before moving ahead.

### KNOWING YOUR LIMITATIONS: Lobbying Laws and Regulations

*Note: Spitfires are campaigners, not lawyers. We encourage you to review the information below, but do recommend you still check with a lawyer before launching any policy-based campaign.*

As you think about your outreach efforts, be mindful of the line between advocacy and lobbying. IRS rules allow 501(c)(3) public charities to do an “insubstantial” amount of lobbying. Private foundations can fund public charities that lobby so long as they don't earmark their funds for lobbying. Some funders may, however, choose to restrict their grants to non-lobbying activities only.

Below are some tips and resources to help you determine if your activity could be considered lobbying under the IRS rules – however, you should consult your legal counsel if you have questions about particular activities.

#### Definition of Lobbying

The Internal Revenue Service defines lobbying as any attempt to influence legislation. There are two types of IRS lobbying: direct lobbying

and grassroots lobbying.

In general, direct lobbying is any communication with a legislator (federal, state, local, international) or legislative staff member that refers to specific legislation and expresses a view on that legislation. Direct lobbying also includes communication with the general public concerning ballot initiatives or referenda, and communication with executive branch officials if they are involved in developing legislation and the purpose of the communication is to influence the legislative proposal.

Grassroots lobbying is any communication with the general public that refers to specific legislation, expresses a view on that legislation, and includes what the IRS considers a “call to action”.

In addition, most states have their own lobbying and ethics laws that could affect your outreach efforts if you plan to target state or local legislation or regulations. When in doubt, consult your legal counsel for more information.

Check out the Knowing Your Limitations tip sheet in the online Toolbox for additional resources around lobbying.





### What Is the Campaign Climate? The Good, the Bad and the Ugly

Now that you've defined your campaign win, take some time to evaluate the climate in which you're working. Use the information gathered here to make sure your campaign win is rock-solid. And if it becomes clear that you might not be able to get the information, resources or support needed to

achieve your goal, go back to Stage 1 to determine whether setting your sights on a different campaign win will better set you up for success. See how other campaigners used research to be smart about their campaign choices by checking out the campaign research case study in the online Toolbox.



### What's Working in Your Favor? What Hurdles Do You Need to Overcome?



Below are core questions to consider as you assess the climate for your campaign. Use your worksheet to write down your answers for each.

**1. What is the state of your issue?** Is it hot on the agenda? Stuck in limbo? Or so far off the agenda that you'll need to do a bit of work just to get your issue into the public conversation? Do people need to understand the problem you're trying to solve or are they already aware and ready for a solution? Is there demand for the solution you are pushing or do you have to create it? If there is demand, is your solution popular, unpopular or unknown?

**2. What are the top messages conveyed by those talking about your issue—both for and against?** It's important to understand the current conversation around your issue. Is the public with you, against you or do people not know about you? Who is quoted in traditional and social media coverage, and what are they saying? Do you have a lot of allies and/or potential allies who can help you gain momentum? Whose message is getting the most traction?

**3. What is the climate around your issue? Is it controversial?** Positive and in line with your goals? Is it being driven mainly by your opposition, or is it relatively neutral? What's the current support for your issue? Do you already have champions in from the policy, public or business world (or other champions depending on your campaign goals)? Or do you have to woo supporters?

**4. How much opposition are you facing? Who is the opposition, and how much do you know about them?** Surprises always happen in campaigns, but doing your homework can prevent some of them. Scan the opposition's website, email lists and social media channels, track their media coverage, listen to their speeches, and know their talking points.

**5. Who else is working on this issue? Is it a crowded field, or do you have plenty of room to gain traction?** What are the biggest factors that will make you stand out to decision makers? In addition to the opposition, think about other

## STAGE 2: EVALUATING THE CAMPAIGN CLIMATE

organizations, including like-minded advocacy groups that may be competing for attention. Take time to think through the unique qualities, positions or strategies you bring to the table. Does it make sense to partner with these like-minded groups?

**Special note:** What should you do when a “friendly” group turns out to be the opposition? A group that backs you on one bill may become a naysayer on the next. Think twice before offending or publicly opposing a group you may need to partner with on a future campaign. Whenever possible, try to keep lines of communication open and understand where overall commonalities are, even when you have differences on a specific issue. This will leave the door open for future collaboration, even if you find yourselves on opposing sides today.

**6. What current events or opportunities can you use to your advantage?** A smart campaigner knows that timing is everything. And if you’re not in the position of creating your own opportunities or news, you need to be prepared to springboard off the news and events of the day. Do this by creating an opportunities calendar that tracks events related to your issue.

**7. When looking at your organization or coalition, what’s its reputation around this issue?** Do people see it as a trusted leader and source of information?

**8. What connections do you have with important leaders or influencers?** Who can help influence the change you seek? Think about the potential decision makers or influencers you’ll need to reach and list them here, noting how closely connected you are to each one.

**9. How large are your mobilizing networks?** Do you have an army of grassroots advocates at the ready? What is your online and offline capacity? Are these networks relevant to the decision makers who you think you’ll need to reach?

**10. What resources are available for the campaign?** Think about the budget (including paying to acquire networks and supporters online), skills, time and staff capacity.

**11. What other context do you need to keep front and center as you plan?** Think about what you noted so far. Anything else you’d add?

**Check-in Point:** As in Stage 1, this is a good time to check in with your planning team. Look to your **Hard Truth Squad** and **Input Givers** to provide their perspective on the biggest strengths, weaknesses, opportunities and challenges.

## STAGE 2: EVALUATING THE CAMPAIGN CLIMATE

### Identifying Your Vulnerabilities

Once you answer your campaign climate questions, you'll also want to identify where you are most vulnerable.

One of the best ways to prevent, deflect or minimize attacks on your issue is to think through where you might be vulnerable. Is opposition to your issue growing? Do you have traditional allies that might become opponents? Will your donors abandon a hard-edged campaign? Thinking about your vulnerabilities now will allow you to craft campaign strategies that will play to your strengths.



Look back at your notes on your campaign climate. As you review it, take a moment to write down where your campaign might be vulnerable and why.

### Maximizing Strengths, Minimizing Vulnerabilities

As a last step — think about what your strengths are and how you might want to factor them into your campaign planning. Do you have a strong grassroots network ready to mobilize on a moment's notice? Or do you have direct connections to that decision maker you need to influence? Think this through now to ensure you make the most of your capabilities and resources, and then write them down.



Also take a moment to list ideas on how to minimize or eliminate the vulnerabilities you listed. When you have noted your next steps, take the time to develop your strategy for the vulnerabilities that could put your campaign at risk. By planning for these vulnerabilities at the beginning of your campaign, you can help avoid unexpected crises that could throw you off course.

## STAGE 2: EVALUATING THE CAMPAIGN CLIMATE

### Final Assessment



With your answers to the core questions complete, take a moment to review the campaign win you chose in Stage 1. Is the win you envisioned achievable? Use the checklist in your worksheet to assess your campaign win using the following questions:

**Is now the right time for this campaign?** It's not enough to just say that it's urgent — what else about the timing is right?

**Is your organization the right group?** What does your organization or coalition have that makes you best suited to lead this campaign?

**Can you win?** If not, is there a way to redefine victory to set you up for progress?

**Tip:** Be sure you have clear, credible reasons for why you think you can succeed.

**Can you handle the risks involved?** Can your organization's reputation, strategic positioning, resources and relationships stand up to the risks inherent in any campaign?

**If any are checked NO:** Refine your campaign win before moving ahead. Use the research you just completed to explore other paths. Lean on your planning team for help.

**If all are checked YES:** Congratulations! You have a smart campaign win and are one step closer to success.

In the next stage, you'll begin mapping the path toward your win. If at any point you discover something that you hadn't thought of — or if the landscape changes — revisit this guide and assess whether you need to adjust your campaign win. And, if you haven't already, invite your planning team to review Stages 1 and 2.



### How Are You Going to Win?

A campaign win is in sight—now it's time to map out the steps to victory. Any campaign has a series of milestones that you must hit on your way to the win. These are the intermediate victories that build off each other and let you know you are gaining momentum. Often, the biggest milestones are straightforward. For example, a group of environmental organizations banded together to pass legislation ensuring that fines paid by those responsible for the 2011 Deepwater Horizon oil spill would be directed back to the Gulf of Mexico region for restoration. The most obvious milestones to get legislation passed in the U.S. Senate looked something like this:

1. A group of bipartisan, influential Gulf senators introduce legislation directing fines to the region.
2. The bill is voted out of committee.
3. A majority of senators vote for passage.

While it's often easiest to start by mapping out the most obvious milestones, it is critical to focus on all the steps you need to reach your win. In the Deepwater Horizon example, the groups needed to outline additional milestones to identify what it would take to move from one step to the next.

For example, they knew that the co-sponsors who introduced the legislation had many priorities and would need to be convinced to focus their energies on moving this specific bill forward. They were also operating in a very crowded legislative session where it was difficult for Senate leadership to bring any additional bills

to the floor for a vote. With these considerations factored in, the full list of milestones for this campaign looked like this:

1. A group of allies make the case to all Gulf-based senators that redirecting fines to the region is in the economic interest of their states.
2. A group of bipartisan, influential Gulf senators introduce legislation directing fines to the region.
3. Grasstops influencers, including local business leaders and elected officials, convince co-sponsors to make committee passage a priority.
4. The bill is voted out of committee.
5. Grasstops influencers within the Democratic Party convince a prominent Gulf state senator facing re-election that passage of the legislation is important to voters in his region.
6. A prominent Gulf state senator convinces the Democratic leadership that passage of the bill would help protect their majority in the Senate.
7. Senate leadership brings the bill to the floor for a vote.
8. A majority of senators vote for passage.

Keep in mind that some milestones may be sequential (you need to reach the first in order to move to the second), but others may move simultaneously. It is important to identify all the milestones that need to happen to ultimately reach your goal. Then put them in the most logical order to keep the momentum building.

## STAGE 3: CHARTING YOUR COURSE

### Sample Milestones

Depending on the type of campaign you're running, your milestones will vary significantly. Here are some additional examples:

**Corporate change:** A consumer change committee headed by a prominent local leader is created in 10 major cities, calling on local businesses to stop selling toys containing a toxic chemical; 10 local businesses and three statewide chains agree to stop selling products made with the targeted chemical; three manufacturers sign a pledge to change their policies to eliminate the toxic chemical in toys they manufacture.

**Behavior change:** At the beginning of the school year, 15 local corner stores in close proximity to targeted schools agree to participate in a fresh produce program; five local schools agree to participate in community-sponsored healthy cooking classes in the spring; 50 percent of grade-school kids in targeted neighborhoods report an increase in the number of fresh fruits and vegetables they eat in a survey conducted at the end of the school year.

**Regulatory change:** Influencers with access to state agency decision makers are recruited to join an upcoming meeting advocating for greater environmental protections around high-priority rivers in the state; state agency head responds favorably in the press after 5,000 people in each community sign a petition calling for greater protections of rivers; state agency changes regulations limiting damaging development near high-priority rivers.

As you craft your milestones, frame them as outcomes so they represent what you ultimately want to achieve. For example, if your campaign is going to release a report to persuade a

corporate leader to become a spokesperson for your effort, your milestone should not be that you release a report. Rather, it should be that the leader agrees to sign on as a spokesperson as a result of reading your report. The report is a tactic that will help you achieve the milestone you ultimately want.

### Chart Your Course

As you begin the process of charting your course, gather your team and ask, "Based on the approach we've chosen, what is the first milestone we need to tackle to get closer to our campaign win?"



Starting with the first milestone, list up to 10 milestones you need to reach your campaign win. Remember: Some milestones may run simultaneously, whereas others are sequential. To ensure everything is in the right order, ask yourself what must happen before you can begin working toward each milestone. Then use your worksheet to number them and make sure they flow in a sequence that makes sense.

**Check-in Point:** This is a good time to check in with your **Campaign Leadership** and your **Buy-In Providers & Doers** to make sure they agree with the path you've laid out and will be willing to mobilize.

### Checking Back

Campaign planning is not always linear. It is essential to remain flexible and creative, and be ready to pivot as needed. When your campaign is up and running, regularly assess whether new developments change the order of these milestones or require you to take a detour or add new steps.



### What Makes Up Your Strategy?

For each milestone, you'll need to make choices about who ultimately has the power to determine whether you're successful or not — your decision makers. Then, you'll need to craft a strategy to help you influence their decision. To do this, you need a clear understanding of who you aim to influence and how you can motivate them to act.

**Note:** If you entered a policymaker as your decision maker, be mindful of federal and state law lobbying restrictions. Remember that you can inform any policymaker, but be mindful of what you're saying. Refer back to page 13 to review information about lobbying.

### Your Decision Makers

For every milestone, there is a person or group who ultimately determines if you are successful. In a behavior change campaign, your decision makers may be thousands of people who belong to the demographic you've targeted. In a policy change campaign, your decision maker could be the governor of your state.



Defining your decision maker or group of decision makers is a strategic choice. Sometimes it's obvious who will help you reach your goal; sometimes it's not. If you're struggling to define a target, start by writing up possible targets on the worksheet. Narrow the list by applying the following filters:

- **Who has the most power over whether you reach your milestone?**
- **With whom do you have direct relationships, or who can you contact easily through others already in your network?**
- **With whom do you have the most credibility?**



Look at your first milestone. Now select decision maker(s) that are the best target to achieving that milestone. List them on your worksheet.

### Your Influence Strategy

Once you know who your decision makers are, you need a theory of influence — an informed hypothesis about how the decision will be made and a realistic assessment of how your organization can influence that process.

For your first milestone, ask yourself the following questions:

**What would trigger a decision on this issue and why?** Understanding why a decision needs to be made and how it will be made is critical to identifying your strategic entry point to influence the process.

**What conditions and factors are your decision makers considering?** Knowing what external conditions will influence the decision — from timing to the political climate — will help you understand what is shaping their thinking.

**Who do they listen to?** Research, including surveying digital and social media, can help you determine which influencers are most likely to shape the decision.

Summarize your answers to the above questions on your worksheet. This will serve as a starting point for your influence strategy.



## STAGE 4: CHOOSING YOUR INFLUENCE STRATEGY

Let's take a look at a recent campaign in Georgia that focused on getting kids to eat more locally grown food. One milestone set by the campaign was to get 20 school nutrition directors to take a pledge to purchase local food for school meals. The decision makers for this milestone were the nutrition directors, who ultimately would either sign or not sign the pledge. In examining the above questions, the campaigners concluded the following:

- School nutrition directors would be triggered to make a decision about a pledge if they heard a vocal demand for it in their schools and saw respected peers in other districts taking part.
- Timing was a critical external factor because nutrition directors meet in March and would be influenced by whether their peers were talking about the pledge at this meeting.
- Nutrition directors listen to their peers and to the principals, parents and students in their district.



For more on influence strategies, refer to Spitfire's "Want Influence?" guide, available at [SpitfireStrategies.com](http://SpitfireStrategies.com), or check out the social science resources available in the online Toolbox.

### Your Influencers

Who has the ability to influence your decision makers? Think about who has the greatest ability to encourage or pressure them to take action. Depending on your decision maker, these may be important constituencies, thought leaders or trusted experts, business partners or suppliers, etc.

You may find that you have a large list of possible influencers who can sway your decision

makers. If that is the case, it's time for tough choices about which influencers will give you the most bang for your buck. The amount of energy and resources you spend should be directly proportional to the importance of each influencer you target. Prioritize your influencers by asking the following questions:

- **Who has the most influence over your decision makers?**
- **Who is most ready to take action?**
- **Who is the easiest for you to reach and activate?**

Use your worksheet to list out all the influencers who can reach the decision makers you chose earlier in this stage. Then prioritize your influencers based on the above questions.



Look at your list. Make sure you segment your influencers so they are as specific as possible. You can segment by demographics, geography and/or other characteristics that will help you reach a targeted group of people. Avoid broad groups such as "the general public," "voters" or "women." Instead, add as many adjectives as possible so you have a clear picture of the kind of person you need to reach to move your campaign forward. For example, if you're working to convince a manufacturer to stop using harmful chemicals in children's products, and you need retailers to pressure them, don't think "retailers." Instead, think "the heads of purchasing at the top five retailers in the manufacturer's home state that sell children's products."

When choosing the influencers you want to target and activate, focus on the people who will have the greatest impact on your decision makers.

## STAGE 4: CHOOSING YOUR INFLUENCE STRATEGY

Avoid the trap of limiting the list solely to the people you already have access to. Look outside of your immediate circle to identify those who are truly influential. It is also important not to focus on the quantity of your influencers over the quality. In many cases, a single influential person, company or small constituency is worth thousands of “slacktivists” who may not have any meaningful influence.

It takes time to organize constituencies. Identify those you need and start recruiting them early so they are ready when you need them.



Need more ideas? Check out the **Forecast the Facts** case study in the sidebar. Also, look up the Researching Influential Constituencies tip sheet and Membership Models tip in the online Toolbox.

Now, we'll take a few minutes to think about activities that will mobilize these influencers.

### Forecast the Facts

For many working on climate change issues, there was a growing concern that a key influencer of public opinion—television meteorologists—still believed climate change was a consequence of natural causes and not human activity. With meteorologists' major role in reaching millions of Americans every day, the campaigners knew they were important influencers to engage in order to shape public opinion on bigger climate change issues.

The “Forecast the Facts” campaign was created to get these influencers on board. To do this, the campaign petitioned the American Meteorological Society (AMS) to “pass a strong statement on climate change.” Through a grassroots outreach strategy, including online and offline tactics, the campaign gained thousands of signatures petitioning the AMS to take a strong, facts-based stance on climate change.

The outcome? The AMS issued a statement in August 2012 affirming the evidence of climate change and the great effects of climate change on our planet. The AMS also stated that the changes go beyond those created by natural forces.

Today, “Forecast the Facts” continues to focus on accountability for broadcast meteorologists, but the campaign has also expanded its efforts to support for action on climate change and push back against those who deny climate change.

## STAGE 4: CHOOSING YOUR INFLUENCE STRATEGY

### Tactics

After you've identified your decision makers, your influence strategy and your influencers, you need to select the major campaign tactics you believe will mobilize your decision makers to action. Sometimes you'll need to rely on tried-and-true activities, like organizing constituencies to go door-to-door, sending sign-on letters, writing op-eds or meeting with legislators. Other times, you'll need to get more creative, with clever offline and online tactics that make your campaign and issue stand out to your influencers and decision makers. Check out some of these creative ideas in the sidebar.

As you think through your tactics, keep in mind that the media world has changed rapidly over the last decade. While traditional media outlets, like newspapers and TV news, still provide significant reach and credibility, campaigners often find even greater success engaging audiences directly through digital channels.



Based on the campaign climate scan you conducted in Stage 2, use your worksheet to identify the broad tactics you are best suited for, and that will most directly influence your decision makers. You should also focus your energy and time only on those activities that directly support the milestones you identified in Stage 3.

### Creative Campaign Tactics

From releasing a targeted piece of research to organizing grassroots influencers to creating a savvy social media strategy, campaign tactics need to be thought out well in advance to get the impact you want to see. Below are a few ideas of how other campaign experts used tactics in a smart, creative way:

#### **In-Person Impact: Water is Life**

Water is Life dispensed polluted water from drainage sources across New York City in an effort to encourage people to donate to its campaign to provide safe drinking water to those in need in developing countries. Each cup featured information about polluted water, such as, "Unsafe drinking water kills more people than war," and the organization's web address. The "gross" factor of considering drinking water that was leaking from a subway tunnel or drainage pipe grabbed people's attention and raised critical funds to filter dirty water in developing countries.

#### **Offline and Online Synergy: Human Rights Campaign**

The Human Rights Campaign's (HRC) social media efforts around marriage equality also offer a great example of a creative and low-budget tactic. When the Supreme Court reviewed two marriage equality cases in March 2013, the organization encouraged people to replace their Facebook profile photos with a red logo signifying support for marriage equality. The call to action was easy to accomplish and gave people a public way to demonstrate their opinion and influence others in their social circles.

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## STAGE 4: CHOOSING YOUR INFLUENCE STRATEGY

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However, before thinking that you can easily mirror the success of that tactic, keep in mind that it was built upon a bigger strategy that mobilized political, celebrity and corporate influencers. During the week leading up to the decision, HRC raised the profile of those who had made statements in support of marriage equality, including President Barack Obama, former U.S. Secretary of State Hillary Clinton and Sen. Mark Warner (D-VA). The combination of the red logo paired with the right mix of influencers – from Beyoncé to Bud Light – opened the door for everyday social media users to join the chorus and support marriage equality.

### **Organizing Power:**

#### **National Council of La Raza**

The National Council of La Raza (NCLR) provides a good example of investing time in building organizing power to push a policy agenda. NCLR works with a network of affiliated community-based organizations across the country. In California, NCLR invested three years to build the organizing power of its 60 state affiliates, which employ 10,000 staff members and reach 3.1 million Californians through their combined services and programs.

NCLR and its affiliates identified the housing crisis as a priority. In particular, they noted issues with dual tracking, the practice in which banks could force a homeowner down the path to foreclosure before knowing whether they qualified for a loan modification.

The organizations reached out to allies and built alliances with other housing groups while NCLR provided advocacy trainings and strategy sessions. In early 2012, NCLR and its affiliates launched a campaign to pass a homeowner bill of rights,

outlawing the practice of dual tracking. Each organization activated its network, generating thousands of phone calls, emails and postcards to state policymakers. The network organized 120 in-person meetings and a rally in Sacramento. The campaign also garnered media coverage that helped shift the narrative from irresponsible homeowners to the injustice being carried out by the banks. The hard work paid off in June of 2012 when Gov. Brown signed the California Homeowner Bill of Rights.

### **Targeted Research: Mission Readiness**

Mission Readiness is a nonpartisan organization of senior retired military leaders interested in promoting smart investments in America's children. During a recent debate in Congress about legislation updating the guidelines for meals served in schools, the group joined a wide variety of food access and nutrition advocates in calling for stronger nutritional requirements. The group was able to gain support from members of Congress that had previously been less interested in the issue by releasing a report titled "Too Fat to Fight." The report cited Department of Defense data indicating that 75 percent of all young Americans 17 to 24 years of age are unable to join the military because they failed to graduate from high school, have criminal records or are physically unfit.

The report broke the data down further, reporting that 27 percent of 17- to 24-year-olds in the United States are too fat to serve in the military—with higher numbers in certain states. The group then used this data to make the case for stronger nutritional standards that would help combat the obesity epidemic among young adults. The report was cited extensively in the media and in the congressional debate and helped advocates ultimately secure passage of the bill.

## STAGE 4: CHOOSING YOUR INFLUENCE STRATEGY

### Pairing Online and Offline Tactics Effectively

Today, it's a rare campaign that can succeed without an online presence. However, the most successful campaigns understand the distinct benefits of both online (email, social media, blogging) and offline (grassroots outreach, in-person events, one-on-one outreach) activities. Digital tools have vastly increased our ability to understand how audiences are reacting to our campaigns, allowing us to develop different models of organizing. The key is to integrate them so that they can strategically bolster each other. Learn more about how to make sure your traditional and digital strategies work together. Check out the Integrating Online and Offline Activities and Disseminating Your Own News Online tip sheets in the online Toolbox.



### Choosing the Right Time to Launch Your Campaign

As you are determining the best tactics to reach your decision makers, you'll also need to think about the right time to launch your campaign. Obviously, if you are trying to pass legislation, you want to be ready to roll when legislators are in session. If you want to get people to stop using fertilizer in areas where it can run into a waterway, you want to be ready by the spring and fall, when this activity is most likely to happen. If you want to get people to put pressure on a public company, you might run a boycott right around the close of

the corporation's financial quarter when there is increased attention on their earnings report.

Deciding on the right timing will also depend on the type of launch you're seeking. Do you want your campaign to:

- **Make a big splash?** Think about whether you can use a hook to build excitement for the launch, but be sure to avoid timing that may distract from your launch, such as near elections or holidays.
- **Work behind the scenes?** This may give you more options for timing your campaign launch, but think about how to build momentum and reach without a public face.
- **Start out quiet and go public later?** Identify the trigger point to going public (e.g., a milestone in the campaign, a certain date) and use the time beforehand to build support and lay a strong foundation for going public.

On your worksheet, note when you're likely to launch your campaign. If you need inspiration, check out the online tool for examples of campaign launches.



**Check-in Point:** Before you move to Stage 5, we recommend taking this opportunity to run these decisions by your **Hard Truth Squad** and **Input Givers**. Ask them to poke holes in your theory of influence to see if it holds up, and determine if there are ways to make it stronger. Then, pass your final decisions by your **Campaign Leadership** to give the okay.



The online tool offers additional sections to help you build a strategy that minimizes your opposition and mobilizes coalitions.

These optional stages are available at any time on the site. We recommend completing them before finalizing your campaign to ensure you are maximizing your network of influencers and being thoughtful about opposition before launching your campaign. Some initial information on both of these sections is included below.

### Focusing on the Opposition

In today's highly polarized world, every campaign needs to be prepared to face opposition. Even if you don't think you have opposition, a little research will likely unveil someone who would argue for a different approach or solution to your issue. Knowing as much as you can about who is working against you, and having a good plan for dealing with them, can mean the difference between winning and losing.

The best defense may be a smart, carefully calibrated, offensive effort to undermine the other side's ability to make life difficult for you. Three questions should be asked to stay on top of your opposition:

- 1. Who is your opposition?**
- 2. What do you know about them?**
- 3. What are you going to do and say to minimize their ability to derail your campaign?**

The online tool will help you to answer these questions. You'll also find a variety of opposition research tools to inform your thinking.

### Engaging Coalitions and Partners: You and What Army?

Every campaign is faced with a common question: Can we do this alone? More often than not, the answer is, "We need to work with others to get the job done." That means working in a coalition or alliance.

The next question to ask is, "Does our strength match the task at hand?" You can do this by listing the capabilities and connections your campaign needs, then noting the capabilities and connections you have. What are you missing? Can organizations or other partners fill in the gaps?

The online tool will walk you through these questions and assess whether your current coalition is meeting your campaign's needs. Or, if you don't have one, the tool will help you think about who the right groups are to have at the table before you begin your campaign. The most important factor is to choose your alliance strategically — the bigger your coalition is, the more time it can take to manage, so your aim is the "just right" alliance.



### Campaign Signals

After you have identified your decision makers, mapped your influence strategy, and decided on your major tactics, it's time to think about the campaign signals for your campaign. (Check out the sidebar for more information about campaign signals.) Not every campaign needs the same level of public outreach—but you'll want to spend some time assessing what direction is right for your campaign and making the strategic choices that will get you there.

In Stage 5 you will consider these three points:

**1. How visible do you want to be?** Are you more likely to get traction with a quiet, insider campaign or a loud, public effort?

**2. What are you going to say to inspire your audience and decision makers to take action?** How will you maximize your ability to gain supporters and minimize inadvertently creating opposition?

**3. What other signals do you want people to see?**

### How Visible Do You Want to Be?

Successful campaigns have very different profiles. Some have a highly visible public presence, while others are quiet and behind the scenes. Some are best positioned as emphasizing their strengths and resources, while others are best served presenting themselves as the underdog. Not all campaigns need to be large with a significant public profile. Some reasons for this might be:

- You are working with a coalition of strange bedfellows who could turn off your diehard supporters.

### Sending the Right Signals

When you think about what you are communicating, consider all of these decisions as a way you send signals about who you are and what you are about:

- **Your campaign's name**
- **Who you stand with**
- **Tone of your materials**
- **Main messages**
- **Which constituencies you are engaging**
- **Who your messengers are**
- **Where you are active**  
e.g., offline, online, in the media

- You know your decision makers will balk at public pressure but may be influenced by select grassroots outreach.
- Big, well-known groups may be the only way to influence your decision maker, while other decision makers may only trust an effort if it seems truly grassroots.

Look back at the decisions you made in Stage 4 about who and what is most likely to influence your decision makers, then outline the type of profile that is best for your campaign (public, behind the scenes, etc.) using your worksheet. Check out the online Toolbox for an example of how two campaigns took different approaches on the visibility level for their campaigns.

Once you choose the visibility level for your campaign, be sure to line up your outreach efforts accordingly.



## STAGE 5: MESSAGING FOR IMPACT

### What Are You Going to Say?

One of the most important factors in a successful campaign is creating a consistent drumbeat. Think about the last time you changed your mind on an issue. It doesn't happen that frequently, right? Research shows time and again how hard it is to adjust a person's thinking on an issue that is core to their belief system. Check out the social science and brain research articles and books in the online Toolbox for more on this research.



As a result, you must craft your message platform with your campaign decision makers in mind. If you haven't taken time to think about what your decision makers care about, take a few minutes to assess their values using the questions in the sidebar.

Your campaign's core messages are your secret weapon for breaking through the clutter. Keep them short, sweet and compelling. Then use them all the time. Repetition is critical. You may get completely sick of them — that's fine. You are not the audience. Do you think Nike will stop using "Just Do It?"

### Crafting Messages that Reflect Your Decision Makers' Values

Before you can craft your campaign's core messages, take some time to think about what your decision makers truly care about and what is going to compel them to take action. As you craft your message platform, it's important to weave in themes that reflect your decision makers' core values, while also being very careful to not highlight any barriers they may have. Here are some questions to think through before you craft your messages:

- What do your decision makers already believe when someone asks them about your issue?
- What do your decision makers care about — their values? Think about their big values (e.g., democracy, fairness, health) as well as their day-to-day values (e.g., getting reelected, increasing company profits).
- What are their biggest reasons for saying no — their barriers?

Once you've brainstormed a list of values and barriers, star the ones that are the most important to your decision makers. If needed, review public opinion studies or talk to others who know those decision makers well for insights. You may also want to check out the social science resources available in the Toolbox to better understand how people make decisions. Then, think about ways to connect your campaign's issue to the value you want to weave throughout the campaign, and pay close attention that you don't bring attention to decision makers' barriers in your messages.

## STAGE 5: MESSAGING FOR IMPACT

### Message Platform

Every campaign needs a message platform that will provide you, your spokespeople, your allies or partners, and your organization's leadership with an overarching positioning statement. Moving forward, all of your campaign communication should consistently support this message. A message platform does not need to be cast in stone or memorized. Rather, the core concepts and language should serve as a guide for influencers and spokespeople as they communicate about your campaign. Below is our recommended structure for creating your message platform.

This message platform has four main points:

**1. The Problem or Opportunity.** This message point explains the problem/need that currently exists or the situation that you are working to change as a result of the campaign.

**2. What We Are Doing.** This message point delineates what the campaign is working to accomplish.

**3. How to Do It.** This message point describes how you recommend addressing the need or problem, with specific actions or steps that your decision makers need to take.

**4. Vision.** This message point explains the result that a campaign victory will bring about and what it will do to solve the problem or fill the need you noted at the start.

Here are some tips and questions to consider as you craft your message points, along with one example of how the Hurricane Sandy coalition in New Jersey that we referenced in Stage 1 communicated their efforts.

This is a good time to draft some ideas for each of your message points and share them with others to review and revise before finalizing in the next step.

**1. The Problem or Opportunity:** This should be easy—what is the big issue that you're trying to solve as a result of this campaign? Why does it matter to the audiences you're trying to reach? How are you going to create the emotional hook to attract people to your cause and motivate them to take action? Is there an easy-to-understand statistic (e.g., "one in four women") that helps you prove how urgent the issue is?

**Example:** *The billions of dollars being spent on New Jersey's recovery offer a window of opportunity that we simply can't afford to miss.*

**2. What We Are Doing:** In a broad sense, what is the campaign seeking to change to improve the problem or leverage the opportunity? Don't get into details—that's the next message. Rather, think about the first sentence you'd want to say as someone is explaining your campaign.

**Example:** *The New Jersey Recovery Fund is helping to ensure that Hurricane Sandy recovery happens responsibly so that we are not putting our homes, businesses and state economy back in harm's way.*

**3. How to Do It:** Now, think about the specific requests you're asking of your decision makers throughout the duration of the campaign. In reality, you might have a different decision maker responsible for saying yes or no for each milestone. This is the message that condenses all those different requests into one statement.

**Example:** *The next state action plan needs to allocate funding fairly to benefit New Jerseyans*

## STAGE 5: MESSAGING FOR IMPACT

*at all income levels, incorporate sea-level rise estimates into community planning and allow the public to know how money is being spent along the way by updating distribution amounts monthly.*

**4. Vision:** For your vision message, think ahead to when you've won your campaign—how will your community, state or country be changed for the better?

**Example:** *By making transparent, effective, long-term planning decisions that will benefit all New Jerseyans, we can help make sure we are smarter than the next storm.*

Before you craft your message platform in the next step, read in the side bar how one group evaluated which message frames were dominating the issue debate before choosing their message platform.

### Message Frame

Before the Center for Community Change (CCC) and the Fair Immigration Reform Movement (FIRM) launched the Keeping Families Together campaign to pass comprehensive immigration reform, they reviewed extensive messaging research and looked at the previous campaigns that sought to reform U.S. immigration policies. Through this review, they evaluated which message frames dominated the debate and whether any were gaining traction among target policymakers.

Two message frames rose to the top. On one side, those against reform focused on the current law by arguing that immigrants without papers are “illegal.” On the other side, immigrant rights supporters highlighted the economic benefits of reform.

CCC and FIRM recognized that neither of these frames recognized the personal impact that our nation's failed and mismanaged immigration policies have on families. So, CCC and its allies reframed the debate by telling the stories of families being torn apart because of the injustices of our broken immigration system.

The stories were collected through the campaign's website and used for media outreach and speaking opportunities.

The new message frame dominated the national conversation. While the immigration reform debate continues in Congress, the Keeping Families Together campaign is still collecting and sharing stories that connect policymakers to the personal impact that our broken immigration system is having on families.

## STAGE 5: MESSAGING FOR IMPACT

### Your Message Platform



Now use your worksheet to write down the four points in your message platform. You can add more proof points to support your core messages later, but for now focus on crafting messages that are short (one sentence each) and simple (avoiding words that your decision makers might not understand and are free from statistics overload).

When you have your draft messages, invite your full planning team to review them. Ask them to make edits or comments. You can also test your messages with a wider group. Check out some quick — and free! — ways to test messages in the online tool.



### What Other Campaign Signals Do You Want People to See?

Now that your messages are locked in, it's time to think about your campaign signals. Some of these may be obvious, such as what you name your campaign. But people pick up on other signals also, such as who stands beside you at a press event or who joins your coalition.

When thinking about these more subtle signals, consider the following:

- **What value do you want to convey?**
- **Are you going to be for or against something?**
- **Are you provocative or reassuring?**

Use the information you gathered during Stage 2 and from the assessments you ran in Stage 4 to help you answer these questions. For example, if you know that your base of supporters is more likely to mobilize around an aggressive campaign that uses more confrontational tactics, choose this over a more reassuring approach that uses softer tactics.

Here are some examples of campaign signals:

1. The name of your campaign.
2. The influencer groups you outlined in Stage 4 who will serve as your messengers.
3. The faces of people who represent stories about your issue.
4. The visuals you select for your campaign website, paid ads and/or rally posters.

Write down your campaign signals on your worksheet.



## STAGE 5: MESSAGING FOR IMPACT

### Campaign Name

The old saying about first impressions holds true for campaigns. The name of your campaign can make all the difference when it comes to garnering support out of the gate. Your campaign name needs to convey your values in a quick and memorable way and make it easy for people who join you to describe those values to others.

As you look at your message platform, can you think of something that might sound good in just a few words? Here are some examples to spark ideas:

- **Play on the decision maker's name:** When Greenpeace was trying to convince Trader Joe's to adopt more sustainable seafood policies, they created a campaign called Traitor Joe's to call out the grocery store chain's conflicting policies.
- **Build upon a statistic:** One in Four shows the prevalence of rape on college campuses.
- **Use alliteration to make it memorable:** Australia's Slip, Slop, Slap campaign helps kids remember to put on sunscreen by using alliteration and onomatopoeia with simple words that sound like the action.
- **Make it action oriented:** If You See Something, Say Something has the call to

action right in the campaign name and is directed out to the audience by using "you." Let's Move does this as well, but makes it more of a group effort by using "us." The Drop the I-Word campaign is even more specific, with the call to action/ask targeted at just the decision makers (the AP and news outlets).

Write down your campaign name on your worksheet. Remember that the point of this naming exercise is to build public support. Don't be so creative that you confuse or alienate people who don't understand or "get" the name. Also, acronyms are overrated. If there is an obvious one, great — but don't spend a lot of time trying to be too clever.



Once you have a draft name, run it by your planning team and others in your network to gather their impressions. Also run the name through several Internet searches to make sure it's not already in use.

**Check-in Point:** This is a good time to check in with your full planning team and take a gut check of your messages and campaign signals. Can they stand up to your opposition? Do they fit the values you are trying to convey? You may also want to field test them with a small, representative sample of your audience. Your goals and your plan may be solid, but the wrong public face and messages can derail a campaign right from the start.



### Take Action

You know what you want to accomplish, and you know when you want to get it done. You have a plan to get there, and you know whom you need to engage along the way. You've determined the main tactics to pursue to achieve success. Now you need to identify and plan the day-to-day details to get it done. Stage 6 will help you manage assignments and identify metrics to track — such as whether you're moving in the right direction or need a course correction.

### Master Strategy Chart: Assignments, Timelines and Metrics

Now that you've determined your milestones, decision makers, influencers and major tactics, you can systematically match assignments, timelines, metrics (see sidebar) and resources to each of the campaign milestones and activities you picked. Start with the milestone you chose for your influencer step and fill in each of the following fields on your worksheet:



1. **Assignments**
2. **Deadline/timeline**
3. **Metrics – including outputs and outcomes**
4. **Budget or other resources**



This is the beginning of your master strategy chart. The online tool has a template chart you can use. You can also use the chart to fill in the activities and assignments for all of your remaining milestones.

### Metrics: Output or Outcome?

Metrics are one of the most important components to successfully managing your campaign. But it's important to think about metrics that lead to outcomes. Here, outputs and outcomes are explained so you can be sure you're thinking of the right metrics in your plan:

**Outputs** are the specific things you will do to move your campaign forward. They are the visible evidence of your plan in action.

**Outcomes** are the changes that occur as a result of your outputs; they show that you are pushing your campaign toward its goal. For example, your outcome could be securing two new champions willing to support your campaign action. Now you have an outcome you can measure.

Don't forget: Outputs and outcomes can also come from digital efforts.

**Congratulations** — you now have a solid strategy in place and are well on your way to making the win you envisioned in Stage 1 a reality.

Now it's time for the rubber to meet the road. These last few steps in Stage 6 will help you manage your campaign team, stay on track, measure progress and make course corrections if needed. And most excitingly, think about what to do when you've won!

## STAGE 6: MANAGING THE CAMPAIGN

### Overseeing Your Team

Check-in meetings are critical to ensure you're staying ahead of a shifting landscape and taking advantage of opportunities. Here are a few questions to have on hand at every campaign meeting:

- **Have we executed all the activities we planned since our last meeting?** Are we closer to our milestones as a result? If not, how can we shift strategies?
- **Have there been any shifts, positive or negative, among our key decision makers or influencers?** Why or why not?
- **Have any new vulnerabilities surfaced?** How can we address them?
- **Have we had any recent successes or failures that we can learn from?** Should we adjust strategies accordingly?
- **Are we moving forward at the pace we expected?** If not, what strategies might lead to better traction?

You may want to choose a good coalition or project management tool if you haven't already.



Check out the online Toolbox for a checklist to use during check-in meetings, as well as a tip sheet on some popular management tool options.

**Don't forget!** When your campaign is underway, it's more than a collection of goals, milestones and deadlines. It's a living, breathing team of people united in their commitment to the cause, working hard and making personal sacrifices every day to get it done. As a campaign leader, don't pass up opportunities to recognize the small victories at every meeting to keep your campaign and your coalition motivated. Be on the lookout for occasions to celebrate, and get your team together for social events. These occasions are often the best way to strengthen working relationships, so be sure to set aside a budget for happy hour, pizza, cupcakes or whatever motivates and brings your team together.

### Tracking Progress and Making Midcourse Corrections

It is vital to take regular stock of your campaign; don't wait for the postmortem. Review the metrics you outlined above, note deficiencies and use them to make midcourse corrections.

What is your plan for tracking progress? Make note of it on your worksheet.



## STAGE 6: MANAGING THE CAMPAIGN

### After the Campaign

You started this campaign planning process with a clear vision of victory. Inspired by that goal, you've put a lot of hard work into planning how to get there, and you've built an organization to make it happen. Someday, you'll reach that moment of truth—either you'll achieve your campaign win or you'll fall short.

Successful campaigners consistently do three things at the end of a campaign:

**1. Take time to celebrate.** Even if you haven't won, you've fought a good fight, made some progress toward the goal, and built friendships and relationships that will support your next effort.

**2. Understand the lessons learned and write them down.** After the smoke has cleared and you've had some time to recover and think, pull your campaign team together to have a frank, honest conversation about what went well, what mistakes you made, what lucky breaks and bad bounces changed the course of the campaign, and, most importantly, what you would do differently to achieve an even better result next time.

**3. Start planning the next one.** Every campaign lays the foundation for the next victory. How will you use the organization, skills, connections and knowledge you gained in this campaign to make even more progress next time?

## About Spitfire

Spitfire is a communication and campaign planning firm that specializes in helping nonprofits and foundations raise their voices to make change happen. We bring our clients' ideas to life with smart communication, innovative campaigns and tailored learning opportunities to help them win big.

Spitfire uses the Smart Chart® to guide its communication planning work and Planning to Win™ to support clients as they think through the strategic steps that go into developing a winning campaign. Spitfire also uses From Big Ideas to Big Change™ to help grantmakers better communicate about their change strategies. In the fall of 2014, Spitfire will unveil its newest tool, SmartScan, which assesses nonprofit organizations' communication efforts.

These free tools are all available at [SpitfireStrategies.com](http://SpitfireStrategies.com). Learn more @SpitfireSays.

## About the Gordon and Betty Moore Foundation

The Gordon and Betty Moore Foundation believes in bold ideas that create enduring impact in the areas of science, environmental conservation and patient care. Intel co-founder Gordon and his wife Betty established the foundation to create positive change around the world and at home in the San Francisco Bay Area. Science looks for opportunities to transform — or even create — entire fields by investing in early-stage research, emerging fields and top research scientists. Our environmental conservation efforts promote sustainability, protect critical ecological systems and align conservation needs with human development. Patient care focuses on eliminating preventable harms and unnecessary health care costs through meaningful engagement of patients and their families in a redesigned, supportive health care system.

Visit us at [Moore.org](http://Moore.org) or follow @MooreFound.

