**Week 7: Crafting your campaign plan**

Objectives:

* Understand the framework for developing strategic plans, particularly within your local issue campaign
* Apply the framework to write your own campaign plan

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| Time: | Activity: |
| 00- :10 | OPENING & INTRODUCTION* Welcome & Introduction -- Liz & Jack
	+ Quote: Plans are nothing, planning is everything -- Dwight D. Eisenhower
	+ Mention -- 1:1s have been wonderful this past week with you -- loved hearing where you are at with your issue
	+ Noticed that a lot of people are wondering, where do I take the next step?
* Goals for the session
* Tonight’s agenda -- welcome, goals/strategy/tactics overview, example, Q & A, closing
* Restating of issues named in the last workshop -- where we have been (our learning journey)
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| :10 - :25 | KEY CONCEPTS* Introduction to planning
	+ There are four main components to consider:
		- Vision, Goals, Strategy, and Tactics
		- What is your vision?
			* Why does your organization or campaign exist? What is the big picture you are trying to achieve?
			* This isn’t simply winning the election or passing legislation. It’s the world you want to see, the type of community you want to create, the vision that guides all of your work.
		- What is your goal?
			* This is the direct, immediate result you this campaign is trying to achieve. Often this is winning an election for an electoral campaign, and successfully passing or defending legislation for an issue advocacy organization.
			* Your campaign goal needs to reflect the capacity, timeline, and political environment in which you operate.
		- Your Strategy
			* The strategy is your roadmap to success. It answers the question of how you will achieve your goal.
			* Because all campaigns have limited time, money, and resources, we must develop effective strategies that allow us to achieve our goals given the constraints and challenges we face, and which successfully utilize the strengths our organization has developed.
		- Tactics
			* Tactics are the actions your campaign takes—these are the phonebanks, canvasses, media events, rallies, LTE events, etc. All the actual work the campaign accomplishes.
			* Your tactics should always, ALWAYS, be aligned with your overall strategy.
			* Often the biggest mistake campaigns make is to jump into planning tactics without ever considering the vision, goal, or strategy for success.
* A deeper look at each plan component
	+ Vision
		- This is your reason for being, what gets you out of bed in the morning.
		- Look to Simon Sinek and speaking to your “why” for help in developing a vision.
	+ Setting proper goals
		- All proper goals have three major questions they should answer:
			* Is this goal realistic?
				+ Can we achieve it given the time, money, resources we have?
				+ Set goals that excited and frighten you at the same time. If you achieve your goals 75-80% of the time...this is a good ratio! If you fail, often you can figure out why you failed.
			* Is this goal measurable?
				+ Do you have a way of knowing when you achieve your goal? It doesn't always have to be a number, it can also be a yes, no measurability.
			* Does this goal solve a challenge?
				+ In other words, does it advance us towards our larger mission.
		- Every big goal should be built in with benchmarks.
			* Benchmarks are checkpoints to evaluate and measure progress.
			* Benchmarks should be flexible, goals should not
	+ Creating a proper strategy
		- Three questions to answer:
			* What institution do we need to target in order to achieve our goal?
				+ This would be voters in an electoral campaign!
			* Within the institution, which particular decision makers will we focus on?
				+ Who can we flip? Who can we influence?
				+ In an electoral campaign, this would be the core constituencies your campaign focuses on!
			* What messaging will we use to influence or flip these decision makers?
				+ ALL OF YOUR TACTICS SHOULD BROADCAST THE MESSAGES YOU DECIDE ON
				+ What motivations do your decision makers have? How can you create messaging that speaks to these motivations?
	+ Planning Tactics
		- All tactics should follow the roadmap and messaging decided on in your strategy.
		- A single tactic alone is not enough, we must plan a coordinated series of tactics over a period of time that effectively amplify and reinforce the core messages we’ve decided on for our campaign.
		- Tactics should utilize social media, in-person, TV, radio, phone. ALL forms of media and messaging.
* Putting it all together!
	+ Write a campaign plan that has these four sections:
		- Your vision
		- Your goal
		- Your strategy
		- Your tactic
		- Be sure to answer all of the questions above!
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|  | APPLICATION* Putting it together -- show example plan template
* Q & A with Jack
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|  | SYNTHESIS* What did you learn today? What do you want more of?
* Example campaign plan template -- next steps
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|  | CLOSING & NEXT STEPS* Reiteration of planning
* Next week teaser: working on your campaign plan together
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