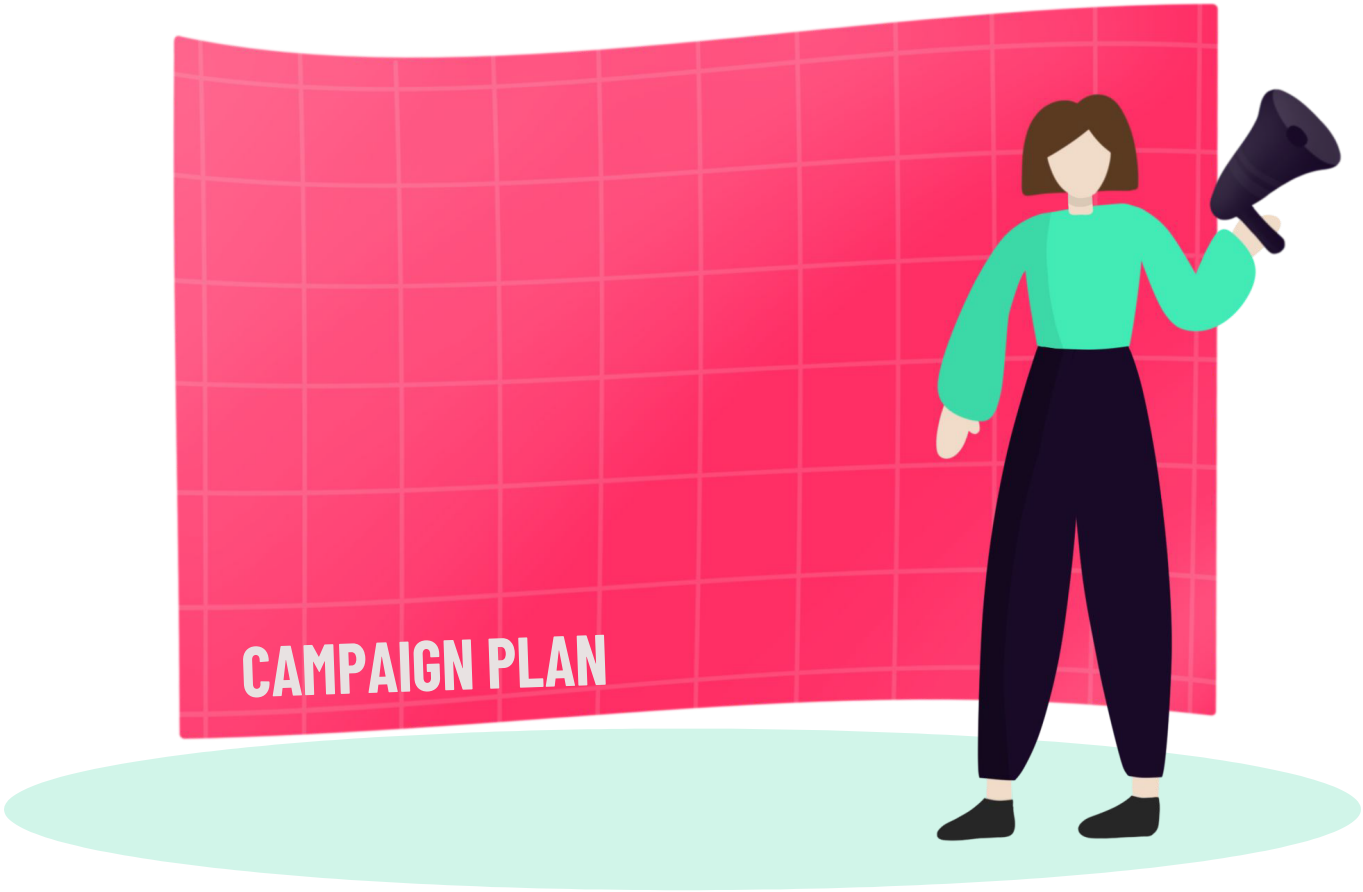

The Road Trip

A Guide To Campaign Planning

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You have chosen your issue, gathered your team, completed your relationship audit/asset map, and now you are ready to launch your campaign. You have been working up to this and you are READY!

But what strategy do you choose? What tactics should you use and when? How do you make your campaign take off? Will it be successful? How would you know?

Do not worry! We know that starting a campaign can be scary, intimidating, and often slower than you imagined. But with the right amount of planning, evaluation, measuring, and maneuvering, your campaign will exceed expectations and set your group up for victory.

A great poet once said, "Life is a highway, and I want to ride it all night long." Well so is a good advocacy campaign. Just like a great road trip, an advocacy campaign is a process with twists, turns, and surprises. Hopefully, this guide will get you ready and packed for the "long strange trip" ahead.

Goal Setting

To know where to take your campaign, you must know where you want to end up. Think of any campaign like a road trip (we'll come back to this metaphor a few too many times) - you might switch routes along the way, but your destination will remain the same. The first step is to set up your destination and work backwards from there.

Ask yourself, "What does it mean for this campaign to be successful?" When answering that question, make sure the answer is as **specific as possible**. With that answer, you have now found your goal. Goal specificity also helps define the metrics or benchmarks of success. These **metrics will track the progress of your campaign** and allow you to pivot strategically during critical challenges. To ensure that sustainable progress can be made, your goal must be a **realistic goal within your campaign timeframe**. For example, we all want to end world hunger for good - but that might take a bit more time than your campaign timeframe allows. Your goal must actually be attainable, so you can determine what exact steps you to take and when you will reach success. Finally, your goal must be relevant to all those who are invested in this work. That way, everyone contributes to its success. We recommend using the SMART framework to help with your campaign planning:

SMART stands for:

Specific: Well-defined, clear, and unambiguous **M**easurable: With criteria that measure your progress **A**ttainable: Winnable and possible to achieve
Relevant: Within reach, realistic, and pertinent to group's mission
Time-bound: Having a clearly defined timeline, including a start date and an end date

A NON-SMART Goal Example: The Swipe Out Hunger team at Greendale Community College will make sure that every student's basic needs are met and that no student experiences food insecurity ever again.

A SMART Goal Example: The Swipe Out Hunger team at Greendale Community College will pass the "Greendale Food Pantry Act" in the 2018-2019 legislative session, which will fund the campus food pantry with a state investment of $100,000 every school year.

Strategy vs. Tactics

Once you have your SMART goal, you are ready to create your strategy. Before listing all the ways to kick butt and reach your goal, it is essential to know the difference between your tactics and your strategy.

First, let's define **Strategy.** Strategy outlines your long-term goals and how you plan to achieve them. In other words, your strategy gives you the path you need to achieve your organization's mission.

Meanwhile, **Tactics** are much more concrete and are often oriented toward smaller steps and a shorter period along the way. They involve best practices, specific plans, resources, etc.

Back to our road trip analogy, our strategy is the car we're going to drive, while the tactics are the roads and highways we will take to get there.

When developing your strategy and tactics, make sure to first lay out your strategy, and then place your tactics on your campaign timeline (we'll get to the campaign timeline later).

Just as you would not choose the route for any trip before deciding the mode of transportation, it's essential to create your strategy first and let that guide your tactics.

A Sample Strategy:
The Swipe Out Hunger team at Greendale Community College will bring together a coalition of student groups, local businesses, and school administrators to pressure the state education and labor committee to pass the Greendale Food Pantry Act. By creating a robust and diverse coalition, we will tell the story of hunger at Greendale College and communicate that we can end it by providing funding to the Greendale Food Pantry.

A Sample Tactic List:

- End Greendale Hunger Coalition (EGHC), bringing together student groups, school admin, and local businesses
- State Legislature email campaign
- Petition
- EGHC Call-In Day
- Lobby visit at State Capitol
- Storytelling Campaign
- Press Conference

Messaging

Once you have set your goal, chosen your strategy, and listed out your tactics, it's time to start recruiting others into your campaign and convince your decision makers to act.

As any good salesperson will tell you, messages must be tailored to the audience to which you are speaking. No one message fits all, so you must develop your messages carefully and direct them to specific audiences.

1 **How do I develop my message(s)?**

First, familiarize yourself with the difference between a "message" and a "slogan," and why you want to develop a “message” and not a “slogan”:

- Your campaign **message** lays out your campaign values and what sets you apart from the status quo. It is not a list of all your policy points or a catchy slogan, but a short and substantive mode to communicate the shared ideals of your campaign.
    i. Example: The Greendale community stands stronger as one united community; we will not stand by as our fellow students go hungry. Let us stand together and end hunger on campus now.

- A campaign **slogan** is a distilled version of your message. A campaign slogan should be less than eight words and is a marketing tagline that will be used at campaign events and on the campaign's collateral.
    i. Example: End Greendale Student Hunger Now

2 **Next, create a target audience list:**

To be successful, your campaign needs to reach out to specific subsets of the public, not to everyone. By focusing your efforts, you'll be able to connect with people whose particular needs and values your campaign reflects – they'll be most likely to support you.

As part of your campaign, you will reach out to specific groups of people that you have identified as supporters or potential supporters. Before you embark on any communications planning or designing your message, it's vital to understand the wants, habits, preferences, and perspectives of these people. This will allow you to identify how to appeal to each audience and move them towards your greater goal.

One way to make sure you are creating messages that resonate with your audiences is to create **audience personas**. Audience personas are little snapshots of potential audiences; they are generalizations that allow you to tailor your message to that specific audience.

Some examples of audience personas:

- School Administration: Middle-aged, busy, and stretched for capacity. Former professors who mostly do office work. They have a passion for the best interests of the students, but do not have the time to interact with them much.
- Active Students: These are students who are already engaged within basic needs movements on campus. They are interested in politics and are mostly juniors and seniors. Most live on campus and have been involved with clubs since their first year.
- Local Business Owners: They are deeply committed to their business and the community at large. They are disconnected from the day-to-day of students, but want what is best for them and the local community. Many of them have been in the community for a long time, but do not have close relationships with school administration.

3 Lastly, identify key messages for your target audience(s):

This message box will help you determine what you will say when you talk about who you are and what you stand for in a way that distinguishes your campaign/movement. Using the message box, you can determine what you will say during the campaign and how you will respond to questions.

The message box is a simple square with four separate quadrants, each of which covers a specific target audience:

1. What We Say About Us: This is where we highlight our strengths, values, and agenda.
2. What We Say About Them: This is what we might choose to say about our target audience.
3. What They Say About Us: This is what our target audience says about us and what they know about us.
4. What They Say About Them: This is what our target audience says about themselves, including what they see as their strengths, values, and agenda.

Create the best tailored message for each audience using this message box.

What We Say About Us *(Our Strengths / Values / Agenda)*	What We Say About Them
What They Say About Us	What They Say About Them

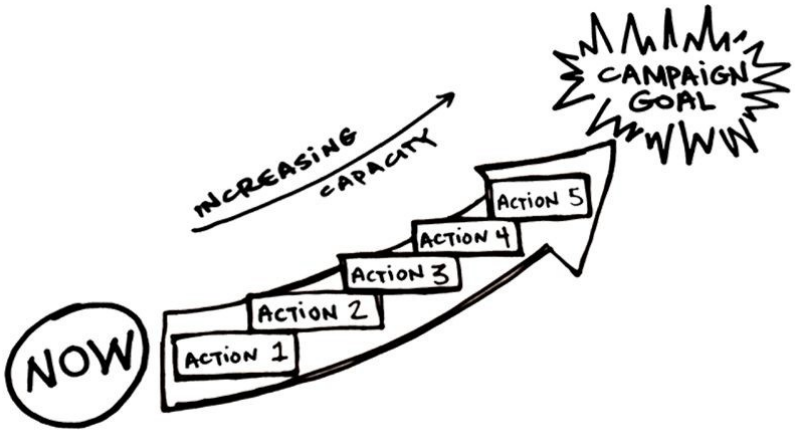
Timeline

You would not leave on your road trip with no idea or goal of when you will arrive at your destination, nor do you start a campaign without building in your time constraints.

Plotting your campaign against a calendar/timeline and understanding the general flow of your campaign is vital. This allows you to ensure you're moving along at a proper pace and on the right track.

Creating a timeline will help you:

- Keep your focus on your intended goals
- Use your resources and capacity wisely
- Sequence your tactics wisely within your strategy
- Keep your team and campaign accountable
- Allow flexibility and proper pivots when needed



Campaigns build power over the course of the campaign.

Actions without a campaign. They get nowhere.

While every campaign will look different, most campaigns will follow a similar "escalating pattern."

Just as you would not start training for a marathon by running 26.2 miles on your first run, you do not start your campaign timeline on the highest action. It is essential to build up towards your most significant campaign moments and build your capacity along the way.

Start building your campaign timeline by starting backward: fill in your campaign goal and work from there. Back to that road trip analogy, start with your destination and plot the stoppage points that get you there afterward. It's always important to know where you are going before you figure out how you will get there.

You might find that the tactic that takes the most resources—but is high impact—is a rally at your state Capitol before a vote. You would want this rally to take place right before your end goal on your timeline. Then, you would include steps you can take to increase your capacity to get there. These steps may include a call-in day, an email action (*where you e-mail a decision maker with an ask, for example, please support a bill or a new program on campus*), a coalition meeting, social media outreach, etc.

Lastly, always add dates to your timeline. Dates can be flexible, but this is a crucial step to make sure you stay on track and that your campaign aligns with the timetable of the issue on which you are focusing.

Targeting

Once you have completed your relationship audit/asset map and before you do your power map, you'll need to determine your campaign targets. Campaign targets are the people with the power to decide the outcome of your issue, and those who influence them.

Targeting helps you identify the people most and least likely to support you. It enables you to prioritize those who you have the best chance of converting to your side.

For example, say you are a student on a campus that needs a majority of the governing body to vote for your issue. Your campaign wants to pass an order through the 20-person student government board. In this case, you do not need all 20 members on your side; you just need 11 to vote yes. With that in mind, targeting can help you use your resources wisely.

Targeting is identifying who will move an issue and, more importantly, how to spend your limited resources, such as time, money, political capital and energy. It isn't best to spend time trying to convince individual legislators to support your issue if they have publicly stated they will oppose it. It also isn't the best use of time if a target is a champion of your issue, though you'll want to keep that person informed and engaged throughout your campaign. Targeting will help you focus on those you think may vote with you if you apply the right kind of effort and resources.

Here are the four steps to the targeting process:

1 **Identify your targets:** Your first step is to identify the decision makers and learn as much as you can about their views on your issue. If your issue is decided by a 20-person student government board, list all 20 members. Have they spoken out on your issue before? Have they voted on this issue or similar issues? If so, how did they vote?

2 **Rank and prioritize your targets:** Once you've identified where your targets stand on your issue, your next task is to rank them in order of priority. There are three priority categories:

- *High priority:* Undecided targets that are potentially persuadable or have more influence in the deciding body. Spend the most time and resources on these targets. These should never be those who are not persuadable and have spoken out against your issues.

- *Medium priority*: People who are leaning one way or the other, or those who are already your champions or on your side. A common mistake is that people place their champions in the priority category. If they are already on your side, you should not be spending limited resources on them. Rather, save those resources for the persuadable.

- *Low priority:* People who are steadfastly against you. Just like you don't spend all of your time fighting Twitter trolls, you don't want to spend all your resources on convincing them of your cause. Make sure you utilize your resources wisely rather than try to bring someone over to your side who will never be an ally.

3 **Research your top priority targets**: Once you have a target list, determine what you need to know about your most persuadable (high priority) targets. Dive deeper into their background and stances on your issues.

4 **Power mapping priority targets:** (See Power Mapping section below) lastly, a tool that can be extremely helpful is the Power Map, because it lists your top priority targets. Power mapping is a framework for identifying people and groups that influence your goal.

Target List Example:

Target	Position of Power	Champion/ Opposed/ Fence	H/M/L	Public Statement	Power Mapped Y/N
Sen. Smith	Committee Chair	Fence	High	www.blog.com/ 123	Yes-LINK
Sen. Gutierrez	Minority Whip	Champion	Medium	www.swipeout hunger.org/blo g123	No
Sen. Bryne	Committee-Co Chair	Opposed	Low	www.opposed.c om/123	No

Organizing Your Team

The most effective movement leaders do not act alone, but rather create teams to work and lead with them. Successful leadership teams offer a model for working together that fosters leadership, where individuals can work toward goals together and each person can take responsibility for different parts of an activity.

At their best, leadership teams recognize and lift up the unique talents of the individuals who make up the team. Strong team structures also help to create capacity to creatively and collaboratively strategize to produce a more vibrant, engaging strategy than any individual could create alone.

An organization of 500 people is not accomplished by one person alone. It is built by willing, committed people and strong relationships that create a solid structure from which the movement can be built.

What Does a Bad Team Look Like?

We have all been part of teams that have not worked well. They fall into factions, they alienate each other, or all the work falls on one person. So many of us conclude one of the following, I'll just do it on my own; I hate meetings, just tell me what to do; I don't want any responsibility; just give me stamps to lick.

There's just one problem: we can't become powerful enough to do what we need to do if we can't work together to build campaigns and take action. The challenge is to create conditions for our teams that are more likely to generate collaboration and strategic engagement. Effective teams are structured to channel any conflict in productive ways, allowing the team to achieve the necessary goals to succeed.

The Snowflake Model of Leadership:

Activating students for coordinated action takes patience, strategy, dedication, and a resolve to keep pushing despite setbacks. To address these issues and target the underlying challenges of capacity and stigma, you can utilize a model called the "snowflake team organizing model."

This model centralizes strategy while decentralizing roles to create an organizational structure that embodies leadership and enables others to achieve a shared purpose.

In the snowflake model, leadership is distributed, and no one person or group of people holds all the power. Responsibility is shared, and the structure aims to create mutual accountability and a common purpose. The model is based on enabling others to grow into leaders and play any role that contributes to the end goal.

The snowflake model solves capacity issues by creating a system in which members of a team have shared responsibility for a common goal, but they work independently toward achieving their components. Each team has a "team leader" who helps to coordinate different pieces; all the while, other team members take on roles to help with tactics and work such as data, recruiting volunteers, preparing materials, etc. Because responsibility is shared, one person doesn't need to carry all the weight. As the team grows, the snowflake changes to incorporate new people into the team.

Advocacy Team Building Worksheet and Sample

Note: These team roles should not be seen as permanent. For the team to be reliable, all leaders should have to earn leadership by carrying out responsibilities relevant to the positions they seek.

Role	Responsibilities	You would be suitable for this role if you . . .	Capacity Needed	Team member
Team Coordinator	Coordinates the work of the leadership team. Prepares for meetings, and provides support and coaching to the team.	Have experience leading teams and are connected to most team members.	Very High	Rachel
Team Manager	Coordinates all team shifts and creates calendars of volunteer shifts.	Are organized and work well with scheduling.	High	Maddie
Tabling Coordinator	Coordinates tabling times and logistics. Works with the Team Manager at the staff table. Signs team up for all tabling shifts.	Love tabling and working with volunteers. Can train others on how to table.	Medium	Josh
Digital Manager	Coordinates digital messages and recruitment. Helps set up digital campaigns and provides social media posts.	Love social media and have a knack for getting others to retweet and post your content.	Medium	Tenille
Recruiter	Assists in recruiting team members to join. Works with the Team Manager to create a recruitment pipeline for incoming students.	Love talking to new people and tell them about how they can end hunger on campus.	Lower	Alexa
School Administration Coordinator	Coordinates meetings and overall coworking relationships with deans and other school administration officials.	Have healthy relationships already with school administrators, and are not intimidated by meetings with deans and other admin.	Lower	Marissa

Coalition Building

What is a Coalition and Why Should I Start One?

No one can complete a road trip without the help of others along the way, whether it be gas stations, road repair, hotels, or restaurants - you use others by letting them play their role in helping you get to your final destination. The same goes for any advocacy campaign: to get to your destination and reach your goal, you must find others willing to help by utilizing their strengths and bringing their unique perspective to your work.

We know there are other groups on campus working toward the same ends (to meet all students' basic needs), even if they are not working on your specific issue. Coalition building is the process in which we come together to provide leadership, guidance, and coordinate efforts to avoid duplication, mixed messaging, and low return on investment of deployed resources.

When building a coalition, there will always be some distinct groups on campus that have similar interests that you can join forces with (other advocacy groups, service organizations, etc.). Teaming up with the organizations that are doing similar work is a natural way to build a coalition. These partners already have a deep understanding of your work and an existing network of supporters who have already bought into the issue of ending hunger on campus.

Another impactful way to build coalitions is to involve groups on campus with a less obvious stake in the issue at hand. Building creative coalitions broadens the power of your campaign by showing more widespread support for the issue.

Think outside of the regular partners such as Greek life or school administrators and reach out to community groups, local businesses, alumni associations, and others. The key to coalition building is to recruit unexpected supporters in a way that still reinforces the message of your campaign.

Issues with Starting a Coalition:

You are ready to start creating your coalition that contains a diverse number of voices to advance your advocacy goal. Right away, you might encounter some common roadblocks that can slow you down, so use these tips to help you work around these challenges.

- **Turf issues:** Groups can be sensitive about sharing their work, their target students, and especially their funding. Part of the work of starting a coalition may be to convince several organizations that working together will benefit all of them and better address their common issues.

- **Lousy history:** Groups on campus, individuals, or the community as a whole may have had experiences in the past that have convinced them that working with others is simply not possible. It's essential to listen to these concerns, understand and sympathize with them, and come up with "ways of working" that help mitigate them. You might not be able to make every student or group be best friends, but creating working norms that allow for collaboration will help all succeed and meet their goals.

- **Minimal organizational capacity:** Many organizations are stretched for size and time already, let alone adding another campaign on top of it. Make sure you find ways for each group to get involved despite their level of capacity. If a group wants to get involved but has little time, find easy and straightforward techniques that allow them to add their voice in with little capacity.

Recruit New Members:

Once your core group is in place, and you've listed out other potential members, you can start recruiting more groups and people to join your coalition.

There are several ways you can contact people and organizations to invite them into the coalition.

- Face-to-face Meetings (with masks/social distance)
- Social Media
- Tabling on Campus
- Emailing/Calling
- Classroom Presentations
- Present at other Club Meetings
- Flyers on Campus
- Hosting Events

Holding Your First Meeting

The first meeting of a coalition can make or break your coalition. If it's a high-energy and optimistic gathering that gets people excited, you're off to a good start. If it's depressing and negative, or just dull, it's a good bet that a lot of people won't come back. It's up to the core group to plan a meeting that will start the coalition off on the right foot.

Follow-Up from Your First Meeting

You have held a successful first meeting, but the job of building a coalition has only begun. First, follow up to make sure that there will be a well-attended second meeting, where work can continue.

After your first meeting, the follow-up is critical in keeping the excitement and momentum moving:

- Distribute the minutes of the first meeting and reminders about the next meeting to those who attended, and send them out with invitations for potential new members as well.
- Follow up on the groups or individuals who are working on tasks assigned at the first meeting.
- If committees or task forces are forming, try to recruit new members for them.
- Keep looking for new coalition members.

How to Best Leverage a Coalition *(Also See Power and Asset Mapping Sections)*

In the section on "Power and Asset Mapping," you will see examples and instructions on how to list your resources and strategize on how best to utilize them. The same process can be done with any coalition.

Every group and person in your coalition brings a unique skill. As the leader of the coalition, it’s your job to identify the strengths of each partner and strategize when is the best time to leverage that strength.

You might have a student group on campus that is not great at talking to administrators, but they can get out 300 students to a rally on a moment's notice. Use that group to increase turnout to significant events near the end of the campaign. Maybe you have a small group of leaders without a lot of influence over other students, but they have close relationships with the administration. Use them in meetings with school offices.

Always utilize your coalition members' best and unique strengths. Allow each coalition member to play their role, and together, you will be able to operate your campaign as a well-rounded, diverse, and strong advocacy campaign.

Benchmarks and Measurement

You have been sailing down the road, making stops along the way, and realize that you've been on the road for quite some time. How do you know you are still on track to reach your destination, i.e. your goal? The same way you would follow your map on your road trip, you will set benchmarks/measurements to make sure your campaign is going at the right speed, that the engine is running smoothly, and you have plenty of gas left in the tank.

Benchmarks are your road trip mile markers; they tell you if you are on the right path and the right speed. They can also give you early cues if you are getting off track. Be sure to choose benchmarks that are measurable and meaningful for your campaign. We recommend creating benchmarks that are SMART goals (see above in the Goal Setting section).

Within your campaign timeline, you should **insert your benchmarks into each tactic** and **weigh those benchmarks against your capacity and priorities**.

For example, if you have listed a tactic in your escalating campaign plan of collecting petition signatures to present to school admin, you should set a goal for the number of signatures you would like to receive (e.g. set a goal for 600 signatures, then set tracking for that total goal of 200 signatures/week over three weeks).

You should also set benchmarks and measure for every tactic in your strategy. For example, "how many coalition partners do you want to bring in?" or "how many students do you want engaged in the campaign?"

Prioritize creating benchmarks for the tactics which are most critical to your strategy. If your strategy relies heavily on partnerships, focus on benchmarks that quantify building your coalition. If your approach focuses heavily on pressuring school administrators with a diverse movement of students, focus on benchmarks that quantify the number of students involved in your movement.

The Boxer Rule

Sure, Mouhammed Ali stung like a bee, but primarily, he floated like a butterfly. If you ever watched the best boxers in the world, they are light on their feet; it looks as though their heels never touch the ground. They know that the key to winning is to be flexible and ready to change strategy and positions at a moment's notice.

On the road trip that is your campaign, you will get flat tires, make wrong turns, miss your exit, and drive into a storm. The key is not to force your way ahead or turn back, but assess the situation, pivot if needed, and improve your odds of success. Every aspect of your campaign, from your timeline, team organization to messaging should hold to the principle of flexibility and measurement. Set specific moments in your timeline to step back and measure your campaign against your original benchmarks. If your campaign metrics are not being hit, strategize why and alter your course.

Altering your course is not giving up on your strategy or admitting defeat; it is leveraging your resources the best you can in the face of challenges presented to you. Remember to float like that butterfly so you can sting like a bee.

For Any Questions, email Advocacy@swipehunger.org