Alliance for Biking & Walking

Winning Campaigns Training

CAMPAIGN PLANNING WORKBOOK

WELCOME!

This workbook is designed for leaders of Alliance member organizations to aid in the development of effective campaigns. The curriculum is designed to break down the barriers and challenges to safe bicycling and walking in your community.

Working through the seven elements of an effective campaign, this workbook helps you choose the right issue and focus on it effectively. It guides you in assessing your resources and developing goals for your campaign and organization. It teaches you how to set strategic targets, communicate effectively, choose the best tactics, stick to chosen timelines, and manage your resources.

Do not expect to always fill out the elements in order. For example, you may redefine your issue after working through an exercise that identifies opportunities and threats. Or, you may change your strategy after identifying your targets. But, after completing the workbook with your campaign team, you will be able to walk away with your one-page Campaign Blueprint.

While this workbook will prove an invaluable resource, it is no substitute for personal advice. Contact the Alliance any time for input, advice and connection to your Alliance peers. Also, remember to access your local resources. Most communities have organizations dedicated to helping social-change organizations become more effective.

Thank you for joining us for this training and for taking the time to plan and prepare your Campaign Blueprint!

– Alliance for Biking & Walking

Campaign checklist worksheet

First, write the names of your potential campaigns in the boxes at the top of each column. Fill in 0, 1, 2 or 3 in each box next to the assessment criterion: a ‘3’ for very high fulfillment of that item, ‘2’ for moderate, ‘1’ for low and ‘0’ for not at all. At the bottom of the page, add up your scores. Of course, the bottom line shouldn’t dictate your final choice. Some criteria may be more important to you than others. But overwhelming support for one campaign should tell you something!

Potential Campaigns:			
1. Aligns with successful model campaigns			
2. Has reasonable prospects for victory			
3. Results in definite and quantifiable improvement in the community (e.g. increases bicycling and walking and decreases crashes)			
4. Sets long-term improvements to the bicycle and pedestrian environment			
5. Engages important groups of people			
6. Fits your organization’s mission, culture and resources — unifies instead of divides			
7. Involves current members in a meaningful way			
8. Attracts new members			
9. Inspires passion among at least a portion of your constituency			
10. Builds your organization’s political power			
11. Leverages positive media and promotion of your organization			
12. Has strong income potential			

#1: Define your issue

Now that you've selected your campaign, it's time to define it clearly. **A clear definition is critical to success.** Everyone in your campaign should be able to express the problem you're trying to solve and articulate the solution — in exactly the same succinct and hopeful manner.

Use the following exercises to refine your definition of the issue you've chosen to address. Use just a few sentences for each item.

1. **Identify the problem** (e.g. ___ is unsafe):

2. **Formulate a solution** (e.g. ___ should have bike lanes):

3. **Illustrate how to implement the solution** (e.g. State DOT should approve ___):

4. **List people who care and what's at stake for them** (e.g. Parents who want to enhance their children's safety):

Quick Pitch:
Now, put these four elements together in a sentence or two that can be recited quickly.

#2: Set your campaign goals

Issue goals
These are the social changes you hope to achieve. For the purposes of campaign planning, your long-term goal should be achievable with this campaign. Your short- and medium-term goals are incremental steps toward your long-term goal. It's OK for the short- and medium-term goals to be small. Those victories keep people energized to win the long-term goal! Be sure to include a target or completion date with each goal.

Short-term	Medium-term	Long-term

Organization Goals
Your organization should be growing larger and stronger as you implement the campaign. This is easiest to measure in terms of members and budget, but also can be measured by newly engaged leaders, stronger relationships with partners, etc.

	Today	After Campaign
Members		
Budget		
Other Goals		

#3: Assess your resources

Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis

Strengths (Internal)	Weaknesses (Internal)
e.g. Strong fundraising ability	e.g. Poor database maintenance
Opportunities (External)	**Threats (External)**
e.g. Allocate stimulus money in our state	e.g. Legislature is not friendly to biking and walking

#4: Strategize

Who has the power to make the change you need to achieve your goal(s)? In identifying these people, be very specific. For example, you should not list the "city council" as a target, but specific members who can give you majority support. Don't list "Department of Transportation," but the specific official with the power to change a policy.

This exercise will help you identify the most important targets. In the case of a city council, for example, your targets are the undecided or persuadable members. The unalterably opposed are not worth your time. The council members who agree with you are not primary targets, but perhaps secondary targets that can help you persuade their undecided colleagues, your primary targets. (See the Alliance's Power Mapping exercise on the next page to plan how you will reach these targets.)

Primary targets Specific people (list names) who have the power to make the change you seek	**Secondary targets** People who have influence on the primary targets

Now, think about public audiences. Identify just a few public audiences, so that you can tailor your message to effectively reach just the segments of the public you need to address. Think in terms of geography (e.g. neighborhoods, towns, counties) and constituencies (e.g. soccer moms, low-income people). The media you choose in the next section will depend upon the public audiences you identify in this section.

<u>**Public targets** (two or three public audiences)</u>

Power mapping

Power mapping will help you to identify power relationships and show you how to influence them. It can help clarify a complex issue and identify the people with investment in that issue. Also, by mapping out who you are trying to influence (your primary target), and who influences them, you are able to identify where in the chain you have influence. Once you identify the stakeholders, you can begin to link them together by the issues they care about. By mapping out sources of support and opposition, power mapping will help you to determine exactly where and how you should focus your strategy and outreach.

Step 1: Locate your goal
List your primary goal — usually, the person with the power to make the change you seek — in the center of your map.

Step 2: Map major institutions
Identify key decision-making institutions, associations, or people that are related to this primary target. Write these names on the page in a ring around the goal.

Step 3: Map individuals associated with the institutions
Put the names of two or three individuals who are associated with each of those institutions in the second ring (moving out concentrically) around the goal. These can be people you know or don't know. There may be more than one person associated with each of the institutions or there may be some institutions where people don't know the names. Here you can note a question like, "Who is the department head?"

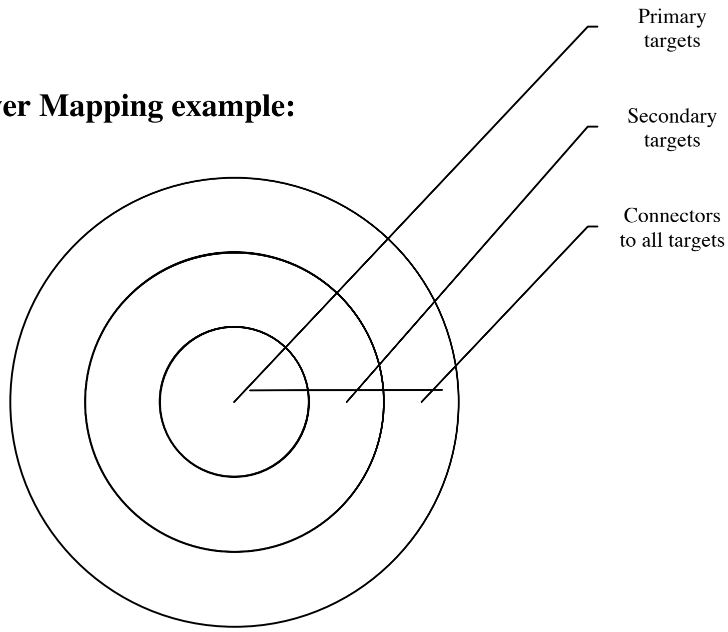
Step 4: Map all other associations
Now, think about the people connected to these key individuals. This helps you identify the easiest ways to reach your primary goal — by tapping into existing relationships between people. This information should go in the third ring around the goal.

Step 5: Determine the relational power lines
Step back and review the networks you've mapped out. Draw lines connecting people and institutions that have relations to each other. Some people will have many, while others may have none. The steps help the group identify what may be called the "nodes of power" within a given network.

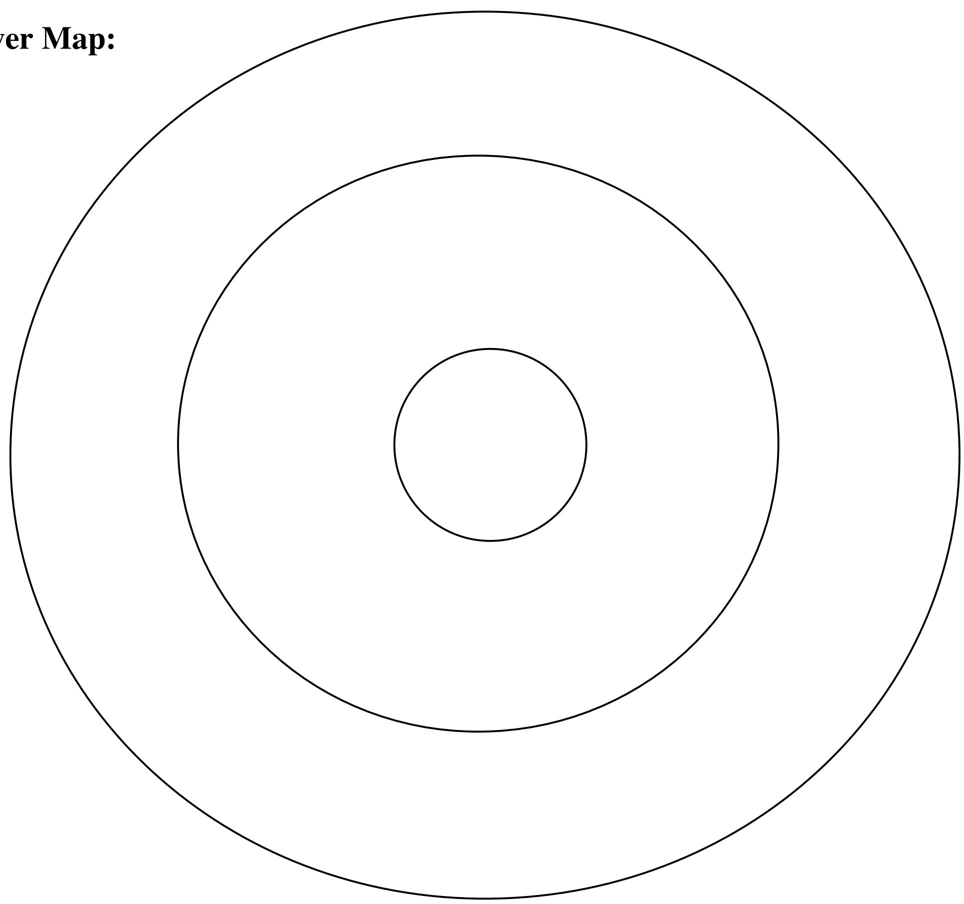
Step 6: Target priority relationships
The next step is to analyze some of the relationships and make some decisions. One way to do this is to circle the few people that have the most relational power lines drawn to them. Involving these people through your group's current relationships may be deemed a priority. If no one in your group seems to be directly connected to a key target, you can take a step deeper and create another power map around each of these key people. Also, a specific person or institution in the map that doesn't necessarily have many relational lines may, nonetheless, have a few critical lines and seem to hold a lot of influence. If you can identify a priority person or institution, but don't have a clear relationship, do some homework about this person or institution.

Step 7: Develop a plan
Create some action steps for what to do next. These can be fairly straightforward. Determine the best approaches to accessing these individuals and institutions through relationships. Who will be responsible for what and by when? The next steps go into the "Tactics and timelines" section of your campaign blueprint.

Power Mapping example:



Practice Power Map:



Notes:

Facilitating Effective Meetings

Volunteers need respect and professionalism even more than paid campaign workers, because they aren't paid to be there. Well-facilitated meetings that respect your volunteers' time and energy will keep everyone engaged and enthusiastic. Here are some tips for effective meetings.

1. Time and place

- Choose a productive setting — for instance, don't choose a venue that's too large
- Be mindful of length — keep it as short as practically possible and remember, after 90 minutes, people need a break
- Begin and end <u>on time</u>
- Prepare and test materials and hand-outs before the meeting starts

2. Build a strong agenda

- Introductions
- Role assignment (or announcement)
- Agenda review (including times on each item)
- General announcements
- Next steps and date to meet
- Evaluation

3. Ensure good facilitation

- Be clear about your role and opinion
- Guide group toward reaching <u>decisions and next steps</u>
- Use brainstorming to get ideas on the table and prioritize those with greatest impact
- Gently prod involvement and stifle dominance
- Assign responsibilities
- Identify metrics so you can identify that you have accomplished your goals

Meeting facilitation glossary and toolbox

Announcement: A presentation that doesn't require response. Should always end with "Contact ______ later, if you want more information."

Brainstorm: One person writes all the ideas that come up. There's no criticism of any idea. This is a method that explores possibilities and encouraging creativity.

Go-around: Each person gets one chance to speak on the issue for a short time. It's similar to a straw poll (see below), but slower and more informative. It's very helpful to distinguish between the questions, "What's best for you, personally?" and "What do you think the group should do?" (Both can be done, but in separate rounds, so the second can be informed by knowledge of others' desires.)

Bike rack: Like a "Parking lot" (but breaking away from car-culture references), this is a technique to set aside ideas to discuss at a future time. Another alternative is the "Ice chest," a method that keeps ideas cool and fresh for later.

Fishbowl: People most involved with, or with the strongest opinions about something, are designated as the only ones to speak for a specified period. This is used to clarify and negotiate controversies. After the fishbowl, the larger audience responds.

Straw poll: This method gets a sense for what the members of the group want without spending the time to hear from each member. This can help a group get to a decision point quickly.

Consensus: This describes a state of group agreement to proceed on a matter in a certain manner. Contrary to popular belief, consensus does not require all group members to have faith in the method chosen, but it does require that all feel their concerns were heard, considered, and, to the extent possible, incorporated in the group decision on what to do, or how vigorously to do it.

#5: Communicate

Effective communication depends on the message as well as the medium. These exercises will help you refine your message to make it most effective. You might find it necessary to revisit your slogan after brainstorming social media tools, writing the story, and the letter to the editor.

Brainstorm **ways you might use social media** tools, such as Twitter, Facebook, or your own website, to engage the media and encourage support for your campaign.

Write a compelling, **personal story** about your issue. Your story should have a victim, villain and hero. It should also include a solution or opportunity for positive action.

Write a **letter to the editor** about your issue. Keep it less than 200 words — 150 words is ideal.

Now, that you've engaged the people in your campaign, write a **Stair Speech**. A stair speech is a short appeal you can relate to a politician on her way to the chambers. It should include a hook, problem, solution, and what <u>he or she</u> can do.

HOOK (A way to get attention and connect with your audience):

PROBLEM:

SOLUTION (Your campaign, including the name of your organization):

WHAT TO DO ABOUT IT (Specific actions for this person):

SLOGAN (Explaining your issue in 10 words or less):

Media Tactics

Think about how your issue might take advantage of one of these keys to making your campaign newsworthy:

- Conflict
- Celebrity
- Uncovered injustice
- Ironic account
- Local interest
- Milestone
- Human interest
- Seasonal story
- Breakthrough

Review the various communications tactics on page 11 and above. Remember, a successful long-term media approach for this campaign will use a comprehensive communications strategy and should adhere to these points:

- Stay on message
- Develop and nurture relationships with media professionals
- Involve your members

Now, choose one or more of these tactics and write down a strategy to implement the tactic.

Media Tactic	Implementation notes

Getting Free Media

Even if we could afford direct mail appeals and paid advertisements, positive coverage of your issue in the media is far more valuable. Ninety-five percent of public decision-makers read the newspaper's news section. Among all newspaper readers, 75% read the main news section, with the editorial page close behind. Less than one-third read advertisements. Getting coverage can be difficult, so it helps to focus your efforts with the right tactics. Having relationships with media professionals is invaluable.

- Become a reliable source
- Return reporters' calls immediately
- Never exaggerate or lie
- Practice crafting good quotes and sound bites
- Identify members who have personal relationships with editors or reporters
- Read your local paper, including the columnists, regularly, so you know their interests and can provide information and angles that match their interests

The following list is a summary of the many types of media, and the pros and cons of each. Make sure you have a comprehensive communications strategy that makes use of all the most effective tactics.

Media tactics	Pros and cons
Pitching news stories- Getting coverage in the regular news section	"Selling" your stories to reporters is one of the best ways to get people to notice your issue and take a side. But it's also one of the most difficult. You need a truly newsworthy story. "Main Street is still unsafe" is <u>not</u> newsworthy. "Jane Doe died because Maoin Street is unsafe, and Mayor John Doe has agreed to make that street safer, but certain obstacles exist" <u>might be</u> a newsworthy. There's a very short window to pitch a story. An upcoming vote is news (albeit rarely covered). Public reaction to a serious injury or death on a street is news, but only immediately after it happens.
Pitching a feature	Human-interest stories are a difficult pitch, but they don't require timeliness.
Press conferences	If you have something truly newsworthy, these can be effective. However, if you are working in a large media market, it is difficult to attract busy reporters. Make it worthwhile by promising a striking visual that will make a good picture.
Public-access TV	Inexpensive and relatively easy way to get coverage, but does it reach any of your targets?
Letters to the editor	One of the most-read sections of any newspaper. Learn how to write good letters. Like news stories, it helps to be timely, or to be reacting to a news article. There is no guarantee your letter will be printed.
Op-eds	These give you the opportunity to tell your story in as many as 500 words. But it is difficult to get placed, and a good OpEd piece takes time. Learn how to write a good OpEd, and **stick to the word limit** or you may fall victim to heavy editing!
Editorials	These are considered very authoritative, but you don't have control over the content. The editors do. Be **very prepared and professional** when you meet with the editorial board.
Columnists	Columnists are authoritative and provide a great way to raise the visibility of your campaign. Again, nurturing a positive relationship with the columnist is key. It helps to be a source for them, even if it's not directly related to your issue. That way, when you need them, they are more likely to help.
Radio talk shows	You don't need to write a report or plan a news conference; you just need to pick up the phone and dial (and re-dial, and re-dial). You probably have members who already listen to certain talk shows. Enlist their help in calling in. Expect backlash, and avoid shows that don't reach your target audience.
Press tours	Consider taking reporters on a tour of your issue, such as a dangerous street. Getting a reporter on a bike tends to lead to a positive story. Very time-consuming to produce.
Public Service Announcements	PSAs allow you to craft the perfect message, albeit in 30 seconds or less. They are fairly easy to place, but usually are played at times when only small audiences are listening. They are expensive to produce in a professional manner.
Online Web 2.0 Technology	Using technology such as content management systems, Facebook and Twitter, allows people to easily learn about your campaign. Use these networking sites to not just engage the media but also create awareness about your issue.

#6: Tactics and timelines

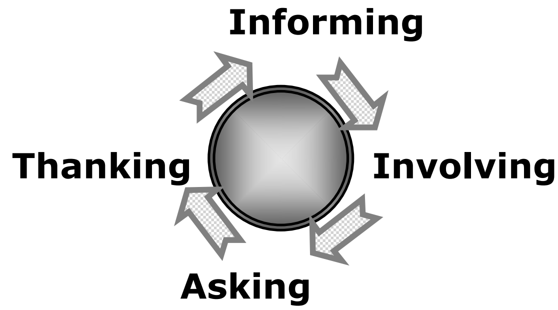
This is your to-do list. There are many kinds of tactics, and positive support can be as effective as simple pressure. In the example of the city council, get an ally to come out in support of your proposal and then flood that person with thanks. Such a tactic makes clear to the undecided city council members that your proposal is wildly popular.

Each of your tactics should meet the following criteria:

- ❑ This tactic effectively achieves our campaign goals
- ❑ This tactic is appropriate to our organization's culture and will strengthen, not divide us
- ❑ This tactic addresses a primary or secondary target, or an identified public audience
- ❑ This tactic is fun, or at least not so daunting that we will alienate our base of supporters
- ❑ This tactic is achievable
- ❑ This tactic is realistic and we have the time, money, and people necessary to execute it

Tactic	Date	Lead person

#7: Resource Management



It's important to know exactly what resources your campaign will require. It is much easier to raise money by asking for support of a specific campaign than asking for general support. Identifying actual costs of your campaign is very important, even if you feel you don't need much money to succeed in this campaign. Don't forget to include the portion of regular operating expenses (rent, telephone, etc) that you can fairly attribute to the campaign. And, of course, always value the contributions of your staff and volunteers through continuously informing, involving, asking and thanking!

Campaign expenses	
Personnel expenses (e.g., Exec. Director)	Total
	$
	$
	$
Professional expenses (e.g., Consultant)	
	$
	$
Other campaign expenses	
	$
	$
	$
	$
	$
	$
Total campaign expenses	**$**

Now, list all possible income this campaign can generate.

Campaign income: All possible sources of campaign income	
New members	$
Donations	$
Grants	$
Sponsorship	$
Events	$
Other	$
Other	$
Total campaign income	$

Fundraising

Fundraising plays a critical role in your campaign. You are giving people the opportunity to invest in biking and walking — something they care about. Nearly everyone has the ability to contribute at some level and, indeed, the majority of giving isn't by corporations or the super-wealthy— it's by people, like you, who care.

1. **Now is the time.** When you have a vision and goal for improving biking and walking, you will find others who want to help. For many, it's easier to contribute money than time. It is always easier to raise money during a campaign, so don't pass up this key opportunity to strengthen your organization and win your campaign.
2. **Appreciating your role**
   - You and others organizing your campaign already have shown your commitment
   - People give to people – identify friends, family, associates, or others you know who care about biking and walking or your work
   - Because you're already doing so much, you're the best person to ask for their help
   - Your job as the fundraiser is to ask – if you don't ask for support, most people will not give on their own
3. **Develop your "Ask"** (See below)
4. **Schedule meetings** Reach out to donor prospects, who are likely to give a larger gift in addition to their membership. Ask to schedule a meeting to talk about ways they can increase their support for the cause. (You could also invite a board member to join you.)
5. **Make the "Ask"** (Review tips below)
6. **Follow through with a thank-you note**
7. **Keep lines of communication open.** Make certain to maintain a relationship. Don't let donors hear from you only in times of need.

The Ask

Once you've had a conversation with a prospective donor(s) and heard their interests and connection to your cause, there comes a time to ask them for support. When you schedule a meeting with that prospective donor, it's important to set a goal. Determine a specific amount you are going to request and a timeframe for the support to be fulfilled. Before your meeting, practice making the "ask" out loud with a friend or co-worker. It helps! Here are some rules to follow when making the "ask."

1. State your request very simply and clearly, with a specific amount and when you need it
2. Wait patiently and quietly for an answer. Keep your attention, your eyes and your ears focused and wait. Do not say anything; just listen and wait. The prospective donor is using this time to decide if and how much to give you.
3. Listen to their answer very attentively and carefully.
   A. If they say 'Yes' or agree, thank them first.
   Be sure you heard them correctly and repeat it back to get their acknowledgement.
   Thank them again.
   Confirm the timeline and any other business and, again, thank them.
   B. If they don't say 'Yes,' don't give up.
   Ask if there would be a better time to discuss this.
   Ask them what they would be willing to do — perhaps, contribute a lesser amount.
   Ask what feedback or advice they have.
4. Ask for a referral. Do they have friends or colleagues they think might be able to help?
5. Come to a close and thank them for their time.
6. Immediately write a hand-written thank you note.
7. Follow through if you made any commitments or promised any follow-up.

Notes:

The Winning Campaigns Training is supported by:

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For more information, resources and inspiration, visit:
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