

How to plan a campaign v1

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This process draws together processes and ideas from the following works:

- Bobo, K.A., Kendall, J., Max, S., 2001, *Organising for Social Change: Midwest Academy manual for activists*. Seven Locks Press: Santa Anna
- Centre for Community Change, 1996, *How – and why – to influence public policy*
- Centre for Community Change, 1998/1999, *How to Tell and Sell Your Story, Parts 1 and 2*
- Kahn, S., 1991, *Organising, a guide for grassroots leaders*, National Association of Social Workers Press, US
- Lakey, B., et al, 1995, *Grassroots and nonprofit leadership*, New Society Publishers: Gabriola Island
- Moore, M., 1998, *Adventures in a TV Nation*, HarperPerennial: New York
- Moyer, B., McAllister, J., Finley, M.L., and Soifer, S., 2001, *Doing Democracy*, New Society Publishers, Gabriola Island
- Peavey, F., 2000, *Heart Politics Revisited*, Pluto Press: Sydney
- Peggy Robin, 1990, *Saving the Neighbourhood*, Woodbine House: Rockville
- Shaw, R., 1996, *The Activists Handbook*, University of California Press: Berkeley
- Sierra Club, 1999, *Grassroots Organising Training Manual*

The “author” has used these works over a number of years and has found many useful ideas contained within them. This process attempts to bring together the best ideas from those works into one (hopefully) simple and straightforward process.

Any comments or suggestions welcome. Please email christinelaurence@pacific.net.au

Advocating for healthy transport

With transport having such a major impact on our community, economy and environment, and strong forces supporting a continuation of road building at the expense of healthier transport choices, a stronger voice for sustainable transport is needed. This is more likely to be effective if it exists within a broader base of a vision grounded in a broad base of support, focuses on a hot issue, subjects the issue to a rigorous analysis then develops achievable goals, identifies primary, secondary and public targets, is underpinned by a strong organisation, that communicates effectively to generate support for the goals, uses tactics efficiently and selectively and evaluates and documents its achievements.

1. Focus

There are a whole lot of transport problems out there needing to be solved. Its better to focus on doing a few things well rather than many things badly. Here are some criteria you can use to help you choose which issues to focus on. If your group is new or inexperienced in campaigning, choose an easier issue to begin with, to get a win under your belt, build confidence and team spirit.

Use these criteria to select an issue to focus on.

Criteria	Issue 1	Issue 2	Issue 3
	1=least 2=med 3=most		
• Result in a real improvement			
• Be worthwhile, widely felt and deeply felt: so people feel its worth fighting for			
• Be winnable: the problem must not be so large or the solution so remote that the organisation is overwhelmed. The members must be able to see from the beginning that they have a good chance of winning, or at least a good strategy exists for winning.			
• Be easy to understand: in general a good issue does not need a lengthy or difficult explanation.			
• Have a clear target/decision maker: if you can't figure out who the decision maker is, you don't have the right issue. The decision maker is always a person or a number of people, not an elected body or corporation (a difficult campaign usually requires several clear targets).			
• Have a clear time frame that works for you: with a beginning, a middle and an end.			
• Have a wallet angle: issues that gain people money or save people money are usually widely and deeply felt			
• Raise money: will constituents contribute to the campaign?			
Total			

2. Analysis

A poorly defined problem - or a problem whose nuances you don't completely understand - is much more difficult to solve than a problem you have clearly defined and analysed. The way a problem is worded and understood has a huge impact on the number, quality, and type of proposed solutions

Issue being analysed:	
Who is causing the problem?	
What is the history of this issue? <ul style="list-style-type: none"> • When did the problem first occur or become significant • What past efforts were made to address it? • What were the results? 	
How many people does it affect? <ul style="list-style-type: none"> • Individuals? • their families? • Society? 	
How frequently does it occur?	
How do people <i>feel</i> about the issue, and what do they believe?	
What is the economic impact of the issue? <ul style="list-style-type: none"> • What are the economic costs of the issue, and who bears these costs? • What are the economic benefits of the issue, and who benefits? 	
What is the social impact of the issue? <ul style="list-style-type: none"> • What are the social costs of the issue, and who bears these costs? • What are the social benefits of the issue, and who benefits? 	
Force field analysis: <ul style="list-style-type: none"> • What is pushing the issue to change? • What are the barriers to addressing this issue? What forces might be at work in the local political scene to make officials drag their feet-or oppose you. Who is pulling the strings? 	

3. Solutions - your goals

Now you have a good idea of the issue. What do you want to do to solve, or partially solve it? Make your goals, Specific, Measurable, Achievable, Realistic, Timed + Challenging.

Some is not a number

Soon is not a time

Its helpful to have short, medium and long term goals, so you don't try to do too much too soon, before your group has built up its powerbase and confidence. Hopefully, your group will want to build power by obtaining one victory, then move on to the next.

Problem: Not enough bicycle facilities

Solution: More money for bicycle facilities

Short term goal

Eg: Get 500 metres on bikelane when Expensive Road is repaved in March 2004.

Measurable (How many)	Specific (what)	Timed (by when)

Medium term goal

Eg: Get \$1 million dollars for bikes in Council's next 5 year Management Plan in 2006

Measurable (How many)	Specific (what)	Timed (by when)

Long

Eg: Have bicycles receive 5% of all transport funding in State Budget 2010

Measurable (How many)	Specific (what)	Timed (by when)

4. Decision makers, influencers and supporters

Now you have selected a problem to focus on, analysed it, and developed a solution to it. Next you need to work out, for each goal:

1. Who has the power to give you what you want – the decision maker(s)
2. Who has influence over the decision maker(s)
3. Who in the community does the decision maker listen to, and who in the community would support you (they are not always the same people).

Decision makers

Once the organisation has set out its goals, it then needs to identify the decision makers who have the power to change policies to implement your solutions and understand the processes you will need to work through to change the policies. The Sierra Club says 'this question must always be answered with the names of individuals – not institutions' (Sierra Club, 1999, *Grassroots Organising Training Manual*).

Persuaders

Persuaders are people who have influence over the decision-makers. Organisations need to identify these people and get them working for you.

Public supporters

Whereas an individual can purchase some goods to bring about a more healthy lifestyle, such as gym membership or organic food, an individual alone cannot purchase a bike path or clean air. Managing the problem at a local neighbourhood level faces similar limitations. An individual or organisation concerned about local air pollution quickly discovers that it is created many kilometres away in other neighbourhoods. Individual, local effort is limited in what it can achieve, so that healthy, sustainable, socially equitable transport requires widespread, organised, collective action.

Stephanos Anastasiadis, from the Brussels based *Transport and Environment* says that 'whilst the technocrats have to be convinced, the politicians need to be pressured by the grass roots'. They believe that the economic arguments have been won in principle, now they have to develop the political will. Similarly, Amelia Shaw, Manager of Public Affairs, Canadian Urban Transit Association, says that the decision makers will move 'when they hear it from the grass roots'. Larry Bohlen from Friends of the Earth believes that 'politicians don't need education, they need pressure'. Surface Transportation Policy Project's Andrea Broaddus is clear that you need widespread public support to get healthy transport proposals adopted 'with only a small public supporting a proposal, it is easier for those with political power to sweep you away and safely ignore you'

Given that demonstrating force of numbers a key, if not *the* key, factor in winning healthy transport, how, in this increasingly busy world, do we get people involved?

Many organisers talk about the need to appeal to people's self interest to invite them to work towards social change. 'People are very busy', says Larry Bohlen from Friends of the Earth. 'They need a compelling reason to get involved.' That's why the careful selection of issues and solutions is needed. Choosing a time-limited goal that has clear deadlines with a clearly defined goal and rationale can help mobilise people.

Chris Cavanagh from the Catalyst Centre, a popular education centre in Toronto, disagrees with the notion of self interest being a motivating factor. 'That fits in neatly with the North American ideal of individual rights. But it simplifies, in a sad way, the depth and complexity of humans, in the same way that behavioural psychology does. People are moved by their relationships. When someone who we are in relationship with hurts, we respond with compassion'. This suggests that personal human interest stories that describe the impact unhealthy transport has on people can move others to action.

The late Bill Moyer said that 'the best way to inspire the public to be actively involved in creating social change is to show continuously, over time, the gap between the powerholders' actual policies and programs and the cultures values and beliefs' (Moyer, B., 2001, *Doing Democracy*, New Society Publishers, Gabriola Island). Once the community is aware that their values and beliefs are being violated, they are inspired to act.

Hubert Dixon III, from the Centre for Community Change suggests that 'to get over people's fear ... you have to have your first victory. It doesn't have to be a change in policy, you just have to plan, carry out and meet your expectations. Then you realise you can do it'.

Working in coalitions

Because transport crosses so many professional boundaries, coalitions are a good way to demonstrate broad community support for healthy transport. Ken Ogilvie from Pollution Probe says that by working in coalition, you show that you have muscle behind you. He cites a letter about air pollution he co-signed with Ontario Medical Association and the Sierra Legal Defence Fund as being a useful way of demonstrating 'I've got these people behind me, Minister'.

Andrea Broaddus tells how the Surface Transportation Policy Project identified organisations who weren't currently in their network but who STPP considered should be. They then held one on one meetings with them, with the aim that, even though they might not join STPP, they might support them.

1. The decision maker(s) who can give you what you want	
Who has the power to deliver your solution? Name the individual (or individuals if it is a committee or legislature)	
If it is a committee or legislature: <ul style="list-style-type: none"> • Who is for you? • Who is persuadable? • Who is against you? 	
How does the decisionmaker(s) legislature/committee work and what processes will be used to decide to implement your solution? (When meet? How make decisions, relevant policies/procedures etc What is the timeline?)	
What is their electorate?	
What is the decisionmaker(s) political connections?	
Who are the decisionmaker(s) campaign contributors?	
How many votes did the decisionmaker(s) win by last time? Check with the Australian Electoral Commission.	
What is the common voter profile of the people who voted for the decisionmaker(s)?	
How did the decisionmaker(s) win? (eg campaign on far right issues? Bus their local nursing home to the voting booth? Hold sausage sizzles with the local footy club? Lever off their Council role)	
How has the decisionmaker(s) they responded to your group in the past?	
What does the decisionmaker(s) think about your constituency?	
Are there others to whom the decisionmaker(s) is/are more responsive who you'll need to enlist?	

2. Community leaders who might have influence over the decision maker.	
Think about <ul style="list-style-type: none"> • Influence/relationship with the decision maker • Members they have • Money they have • Credibility • Appeal • Network • Reputation • Skills • Newsworthiness 	List influencers here:
3. The community: those who you will reach out to, to create demand and hold the decision maker(s) accountable. There are two sections in the community to reach out to:	
3.1 Those who your decision maker most responds to (eg. those who voted for him/her/them)	
Age	
Gender	
Income	
Education	
Current opinion regarding this issue	
3.2 Those in the community who are most likely to support your cause	
Age	
Gender	
Income	
Education	
Current opinion regarding this issue	

5. Story and slogan

A key element of a strategy for healthy transport is a communications plan. This part of the strategy sets out the way in which the ideas of the campaign are going to be disseminated to a wider public to enlist their support, encourage them to take action and influence the decision makers. The Sierra Club says 'you will not win your campaign by merely telling people to do the right thing. You will need to make your case'.

They suggest that the key points of a social change campaign need to be distilled into firstly one brief sentence (the bumper sticker) and then into a short story that 'dramatizes the problem and what needs to be done'. Once this is done, all materials, be it speeches, letters or media releases should 'stay on message'.

Tone

The Centre for Community Change says that 'perhaps even more important than the clarity of your arguments and message is the tone of your message. Tone is amazingly undervalued'. Stephanos Anastasiadis, from Transport and Environment says 'the more passionate you are, the less credible you are' as we live in a world that is scientific and values the dispassionate.

One interviewee expressed concern that 'activists are so shrill'. Shrillness and anger, whilst understandable in the face of government and industry intransigence, signals that the advocate feels powerless and that control rests with the opposition. It can also scare off bystanders who have yet to take positions on the issue. Instead, a reasonable tone, together with optimism and enthusiasm, serve to draw people to your argument, and don't stand in the way of your message.

Stories

Transport planning is an especially rational, technical activity and those advocating for healthy transport have a tendency to bombard the community and decision makers with facts and figures. The technical terms that are used, for example tonne-kilometres, vehicle kilometres travelled, particles per million, are not particularly meaningful for the general public, though they have significant consequences one way peoples daily lives. Whilst is essential that the stories are underpinned by well researched facts, advocates need to go beyond them. To win public support for healthy transport, translating abstract concepts into stories that resonate with people's lived experiences is more meaningful and compelling. And also easier to remember.

Stephanie Vance, from AdVance Consulting used to work for healthy transport advocate Senator Earl Blumenauer. She says that letters containing personal stories from constituents about how an issue matters to a constituent 'cut through the chaos of a politician's day and makes real what is happening in their district'.

Rich Stolz from the Centre for Community Change says that stories are 'politically compelling, they play to the strengths of the people, who have expertise that the statistics people don't'. During the debate over reauthorisation of the Intermodal Surface Transportation and Equity Act, community members briefed staff of the Senate Environment and Public Works Committee about the positive impacts of the Act. The speakers told stories about improvements to transport in their area, and how it had improved their communities lives. The stories were powerful and conveyed information in a way that dry statistics wouldn't have.

Moving the Economy opened their conference with a story about a 'day in the life' of a city with healthy transport. The story follows David, Jane and their daughter Jenny as they telecommute, cycle to work, and dial up home deliveries from nearby farmers.

Whilst these stories are helpful in bringing statistics to life, it is important that the bigger picture, the context, is not neglected. Focussing entirely on individuals can neglect the bigger

economic picture. A critical part of story telling is framing the issue. The Centre for Community Change says 'framing selects and organises pieces of information into stories which make sense to their audiences. The frame suggests who is responsible for the problem and what needs to be done. Its essential to the attribution of responsibility for addressing public issues'.

Use your analysis of what will appeal to your supportive influencers and supporters to prepare a convincing argument and turn it into a story and a slogan. You will use these as often as you can in all your activities (see below: tactics)

Story	
A story puts a human face on the issue. A good story has:	
a problem or threat	
a victim or place in distress	
a villain who is responsible and should be held accountable	
hero, the public who can make the difference by getting involved and speaking up and/or public officials who can stand up for the victim	
a solution	
Write the whole story here:	
Message/slogan	
Turn your story into a slogan that fits on a bumper sticker	

6. Tactics and time line

Now that you have selected an issue to focus on, analysed the issue, developed a solution to it, identified the decision maker(s) who has the power to implement the solution and their decision making process(es) and timing of those, identified the people who have influence over the decision maker and people who might support you and developed a story and slogan that will appeal to those audiences, you are ready to develop a timetabled set of tactics to:

1. induce the decisionmaker(s) to implement your solution
2. encourage your potential supporters and influencers to get involved and act to support you

Most non-violent campaigns rely on undercutting the support of the decisionmaker(s) until they are forced to change, not on converting them to the justice of your cause. Are you going to win by:

- converting them: will they realise the error of their ways and join you?
- acquiescence: will they be converted enough or give up so that they don't stop you?
- accommodation: will your target lose support from supporters who are crucial to them and accede to your demands?
- incapacitation: Will your target lose support from their supporters who are crucial to them and be rendered powerless or irrelevant (dethroned, demoted, defeated in an election)

A wide range of tactics is important because:

- different tactics appeal to different individuals and groups
- tactical flexibility is a source of surprise
- tactics serve as a lesson about how to engage in the world. Tactics open one's eyes to possibilities
- tactics are training systems for engaging others in an organisation's work.

Non violent direct action also has a role to play in drawing public attention to public policies that are violating the community's deeply cherished values. It is a technique that has been popularised by Mohandas Gandhi and Nobel Peace Prize Winner Reverend Martin Luther King. Hubert Dixon and Rich Stolz from the Centre for Community Change and Stuart Cohen from the Transport and Landuse Coalition spoke of the role it could play in putting the public spotlight on issues. They all cautioned that it was not a tactic that should be used in isolation, and should only be used once reasonable requests had been ignored.

Bill Moyer calls non violent direct action 'politics as theatre'. He says it creates dilemmas for the powerholders – if the demonstration is allowed to go ahead, the citizen's claims are upheld. If they act to repress it, their violation of society's values is revealed. For example, Rosa Parks' refusal to give up her seat on an Montgomery, Alabama bus to a white person highlighted the violation of the American value of equality and democracy.

As Martin Luther King said:

You may well ask, "Why direct action? Why sit-ins, marches, etc.? Isn't negotiation a better path?" You are exactly right in your call for negotiation. Indeed, this is the purpose of direct action. Nonviolent direct action seeks to create such a crisis and establish such creative tension that a community that has constantly refused to negotiate is forced to confront the issue. It seeks so to dramatize the issue that it can no longer be ignored. I just referred to the creation of tension as a part of the work of the nonviolent resister. This may sound rather shocking. But I must confess that I am not afraid of the word tension. I have earnestly worked and preached

against violent tension, but there is a type of constructive nonviolent tension that is necessary for growth. Just as Socrates felt that it was necessary to create a tension in the mind so that individuals could rise from the bondage of myths and half-truths to the unfettered realm of creative analysis and objective appraisal, we must see the need of having nonviolent gadflies to create the kind of tension in society that will help men to rise from the dark depths of prejudice and racism to the majestic heights of understanding and brotherhood.

Humour

Throughout history, humour has been used to break through people's resistance to thinking about issues that they'd rather not be confronted with, by comically highlighting absurd contradictions. Here two examples draw attention to problems in a way that makes you laugh whilst you absorb the idea. They quickly make a point in a forthright manner that gets to the point more quickly than a report or submission might and jolts us out of our taken for granted understandings of reality enabling us to see in a fresh new way. They can also be used to get into the media in a way that demonstrations, often regarded by the media these days as 'ho-hum' or 'passé', don't.



Tactics include:

- marginal election seat campaign, enlisting as many people in your campaign as are needed to change the outcome of the next election by changing their vote based on your issue.
- developing and maintaining ongoing relationships with legislators and their aides
- writing letters to or phoning or visiting elected officials
- writing letters to the editor
- criticizing unfavourable or applauding favourable action in the media
- filing a complaint
- seeking enforcement of existing laws or policies
- conducting a petition drive
- legislative advocacy
- conducting a public hearing
- organizing a boycott
- rallies
- marches
- vigils

Criteria to choose tactics include:

- do they play to your organisations strengths?
- are they able to communicate our story or message compellingly?
- are these tactics people can get excited about?

- do you have enough time and other resources to carry out these tactics? Although not discussed in this workshop, ongoing organisational development is essential. You'll need fundraising strategies, volunteer recruitment and induction strategies etc.
- is it something that allies and constituents would be prepared to get involved in?
- what kind of opposition you can expect? How are the decisionmakers or opponents likely to respond? Are there ways to get around it?

Getting media coverage is a tactic that is critical to your campaign. Media is used to:

- encourage your supporters to support your cause
- influence decision makers
- generate activism
- flush out and verify the record
- force a position to be taken or revealed
- reveal motives
- hold official or corporation accountable

As well as organising large groups of people, 'in the modern media dominated world, shaping and responding to public opinion is crucial ... power also comes from having a message that resonates with people both within and outside a community' (Centre for Community Change, 1999, *How to tell and sell your story*). Community organisations can use the media to win in the court of public opinion.

Whilst media coverage is no substitute for direct person to person contact and strong organisations it is important to communicate to the community and politicians via the media. The media can be used to shine the spotlight on an issue, person or corporation, influence decision makers, generate community support, make public policy positions and divulge motives.

Politicians and corporations value their reputation and hate bad media. Media is an important way to get political impact, the politicians know you are watching them, but if no-one is sticking a microphone in their face they don't care.

Hubert Dixon from the Centre for Community Change reminds us not to underestimate the power of our own media and smaller local papers. He says a website is valuable as you can publish quickly.

To get media coverage, groups use a diversity of tactics. The Surface Transportation Policy Project has found success in ranking different cities on scales such transport accessibility and accident rates. The 'competitions' attract considerable attention when, for example, New Yorkers are found to weigh less than people in Delaware because they walk more due to denser development. Other organisations stress the importance of visuals for television media.

Tactics timetable

Goal: To get Council's Transport Strategy (due for adoption in August) to declare 10km of cyclepaths

Date 10.12.03

Months		Jan	Feb	Mar	Apr	May	June	Jul	Jun	Aug	Sept
External events				<i>School holidays</i>			<i>World Env Day</i>				
Decision maker(s)	Them				<i>C'tee meeting</i>		<i>Meet influencer</i>	<i>C'tee meeting</i>		<i>Vote on your issue</i>	
	You		<i>Launch research report</i>	<i>Meet C'tee chair</i>							
Influencers	Them		<i>CEO support</i>		<i>AGM endorse your campaign</i>	<i>Write to DM</i>	<i>Meet DM</i>			<i>Vigil</i>	
	You		<i>Meet CEO</i>				<i>Write to AGM asking for endorsement</i>		<i>Invite to vigil</i>		
Community-demonstrate support	Them			<i>Join Donate Children's fair</i>	<i>Write letters to DM</i>	<i>Write letter to editor</i>	<i>World Environment Day evening</i>	<i>Meet local Councillors Yard signs</i>	<i>NVA training</i>	<i>Vigil</i>	<i>Pack public gallery</i>
	You: recruit, train, fundraise		<i>Fundraising strategy</i>	<i>Door-to door canvas</i>	<i>House parties</i>	<i>Phone tree</i>	<i>Slide show</i>	<i>Visit with yard signs</i>	<i>NVA training</i>		
Within your group		<i>Launch campaign</i>	<i>Review strategy Volunteer night</i>	<i>Review strategy</i>	<i>Review strategy</i>	<i>Review strategy</i>	<i>Review strategy</i>	<i>Review strategy</i>	<i>Review strategy</i>	<i>Review strategy</i>	<i>Party Review strategy</i>
Media		<i>Campaign launch</i>		<i>Children's fair</i>	<i>Influencer endorsed</i>	<i>leaflets at train stations</i>	<i>Influencer meeting DM</i>	<i>Meeting local Councillors</i>	<i>NVA training</i>	<i>Vigil</i>	<i>Pack public gallery</i>

Tactics timetable

Goal: _____

Date

Months

External events											
Decision maker(s)	Them										
	You										
Influencers	Them										
	You										
Community - demonstrate support	Them										
	You: recruit, train, fundraise										
Within your group											
Media											

Evaluate and document

Evaluation and documentation of activities should be an on-going process. Its worth taking 10 minutes at the end of each meeting or action (longer if you need) to do a round of 'what went well or what I would like to change about what we did' to create a space for people to speak up with suggestions and to calibrate your groups activities as you go, rather than leave it to the end of your campaign.

What went well?

What would you like to do differently?

Advocacy resources

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