

Campaign Plan Template

How to use what you have to get what you want

This worksheet helps you turn big ideas into a campaign plan that's strategic, sharp, and ready to roll.

Grounded in thoughtful planning and creativity, it was designed to help you to turn your ambitions in real-world action that's informed by your teams' capacity and strengths, your community's needs, and your best points of leverage, creating space for joy along the way.

This template will walk you through the development of a plan for your:

- Goals
- Objectives
- Powermapping your decision-makers and their influencers
- Tactics
- Coalitions and allies
- Messaging to Win
- Evaluating, pivoting, and surfing the backlash
- Celebrating your successes

Use this template as a foundation for a multi-day planning meeting, or spend an afternoon with it to start building or revisiting your campaign's foundation. If you're knee-deep in a campaign and find yourself struggling, scan it for the sections that feel like they might bring some juice and start there.

For a fun and quick overview of all of the elements of campaign strategy, check out TREC's [Wizard of Oz Campaign Strategy Overview](#) worksheet.

GOALS: What's the BIG Picture Change you're seeking

What would have to happen for you to put up your feet and retire from this campaign? This is your goal.	Your Goal(s) • • •
Questions to consider: Why hasn't this goal already happened? What's getting in the way or preventing your goal? <i>Example: if you want to stop rare mineral extraction in a region, what is preventing that moratorium?</i> • Rare earth minerals are lucrative • Industry provides jobs • The government might benefit in terms of GDP • The demand for the minerals is high	What's getting in the way of your goal or has stopped it from happening thus far? As you plan, think through your solutions to these issues. You don't have to have the answers! Sometimes, it helps to phone a friend, aka work with or reference other people and organizations who have solutions. • • • •

People don't realize the environmental impact of these resources and might think they're part of clean energy future.	
What levers of power/impact does your organization have that could move you toward this goal? <i>Example: if your goal is to protect endangered forests in North America, what part will your organization play? Do you litigate, organize, or develop land trusts? What is the unique power you bring to bear?</i>	Levers of power/impact

OBJECTIVES: What are the steps that get you to your goal	
Objectives are the steps toward your goal. They should be SMARTIE – specific, measurable, actionable, realistic, time bound, inclusive and equitable, and should be connected to your special sauce, your unique skills and power. <i>Example: Your goal is to protect an endangered ecosystem from logging. There are a lot of ways to do that! If you're a legislative group, your objective could be legislation. A group that does corporate reform's objective could be getting companies to stop buying produces from that ecosystem. A direct-action group could try to make logging or extraction from that ecosystem logistically impossible through blockades. You'll want to get very specific – what's the legislation? What's the corporation you'll hold to account?</i>	Your objective(s) and their anticipated timelines:
Common pitfalls when crafting objectives: - You have good ideas but they aren't realistic and/or they don't get you where you want to go - They don't align with what you do best (your special sauce) - They are too tactical and not strategic - They don't target the decisionmaker who can make your action or thing happen - Often, we are biased toward the way we've done things in the past, or our specialties. In the example above where a group wants to protect an endangered ecosystem from logging, the group might quickly think of objectives based on their specialty, like legislation. But further examination might unearth that running a markets campaign to stop corporations from buying in that region might be more impactful. <i>Challenge your biases!</i>	Pitfalls you could run into:
Tools:	SMARTIE goals Force field analysis SWOT

Decisionmakers and Power mapping	
Who can make your objective happen? These are your Decision Maker(s)	• • •
What do your decision makers know about the issue? What is happening in the world that is time dependent? What do they need for success? <i>Give them a place to land and something realistic to DO not just what 'not to do'.</i> <i>Example:</i> • An organization launched a campaign to get their local city council to take an action. They used emails, protests, media... but it wasn't working. They were hounding on the issue, essentially educating people on the problem and what we wanted to see happen. • At some point, they realized we hadn't fully analyzed what our leverage point was. They hadn't really ever asked anyone INSIDE the decision-maker's office what was getting in the way for them or what was even possible – they just messaged on what we wanted. • When they DID ask, they learned that the gov actually WANTED to do the right thing but couldn't show it publicly for fear of political backlash. They needed cover. They needed someone from the outside to make it look like their hand was forced. So, the group sued the government. That was their point of leverage and it worked. <i>Being hard on issues, soft on people is requisite.</i>	• • • • • • • •
What do the Decision Maker(s) care about?	• • •
Who influences the Decision Maker(s)?	• • • •
What do the influencers care about?	• • • •
How can you influence the influencers and the decision-maker(s)?	• • • •

Brainstorm a big list of all the ways you think you could get their attention and their focus on your issue. This is a great time to create group norms for brainstorming such as: no bad ideas, celebrate bellyflops, improv rule of 'yes, and' (rather than talking through all the ways something won't work,) commitment to keep reaching for new ideas rather than spending time during the brainstorm double down on ideas that have already been shared. Remember that humor can be a powerful tool!	• • •
Common pitfalls: • Making assumptions • Educating rather than motivating • Not providing a realistic solution • Confusing the tool with the action (e.g. some decision makers aren't influenced by the size of your online list of supporters - they're influenced by what you have those supporters DO.)	Pitfalls you could run into: • • • • • •
Tools:	Powermapping worksheet

Tactics

Tactics are the 'how' of your strategy: they're the specific actions you'll take

We can get really invested in research and planning, talking with our folks, but if we're not doing things that people can see, feel, touch, interact with, we're not campaigning.

What are the impactful tactics you want to employ? Do you have the capacity to see them through?

Keep it simple:

- Create a through-line
- Develop steppingstones to move from current to desired state
- Don't inform about the issue, motivate toward action
- Assess against your power map

Your Tactics

For each, name the target and how you anticipate it to change or influence their behavior.

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**TREC****TOGETHER RISING AS AN
ENVIRONMENTAL COMMUNITY**

Example: Building a list of 30,000 supporters is great, but what you do with that list? How will you leverage what you've built for impact? Will you deliver those signatures in-person with press attending? A rally? An ad? These are the tactics.

Common Pitfalls:

- Taking on too much & burning team out
- Not having the budget to do what you want to do well
- Not being clear on desired outcomes for each tactic
- Not coordinating across teams to ensure capacity
- Repeating tried and true actions or activities without analyzing the impact
- Using tools and resources without assessing whether they will have the desired impacts
- Conflating creating something like an email list or an advertisement or rally with an objective – it's what you DO with the list that's the objective, such as delivering a petition with all the names.
- Giving up too soon!

Pitfalls you could run into:

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Tools:

- [Scrapbooking exercise](#)
- [Campaign budget template](#)

Coalitions and allies:

What power do you need to build in order to succeed? We go further when we go together.

Who do you need onside in order to win? Powermap your own capacity and those of allies/potential coalition partners.

How would working together change your campaign's trajectory?

Think about who should be at the table.

Who will be impacted? *No decision about us, without us.* Getting very clear on what you're working on together, and where you have different goals and finish lines, is essential in creating strong partnership and coalitions.

Who do you want/need to partner with and why? How will you make that happen?

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Who could be impacted by your campaign

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Common Pitfalls:

- Putting your allies/others at risk
- Not considering consequences
- Being tactical with allies themselves (pawns)

Pitfalls you could run into:

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Committing to more than you can really do (e.g. empty threats)	
Tools:	Powermapping potential allies and coalitions Premortem – Planning for Challenges <i>We can predict a lot of the things that are going to get in our way: Plan for them.</i>

Messaging to win: Campaigns are communications exercises

Developing messaging that moves the target audiences and decision-makers requires discipline: Your main message should be simple and should resonate with your audiences' closely held values, using emotion.

Core campaign messaging is not about informing people – they're about motivating people to act, to use what they have to get what they want

- Perfect is the enemy of the good campaign message
- Motivate, don't educate
- Keep it simple
- Speak to your audience (*not to yourselves!*)
- "55 minutes of emotion to 5 minutes of fact"
- Repeat, repeat, repeat
- Celebrate successes early and often
- Test out your messages and refine if you find one is working really well!**

Questions to ask:

- Could a middle schooler tell you what your campaign is about? (News articles are written to an 8th grade reading level)
- Are the problem AND the solution easy to remember and repeat?
- Do people feel the issue; does it connect to them personally?

Your core messages:

Start with your main bumper sticker message. Then, adjust for each core audience

Common Pitfalls

- Focusing on facts – thinking that facts motivate
- Being too complicated

Pitfalls you could run into:

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• Trying to make your message communicate everything • Focusing on education rather than motivation • Preaching to the choir • Focusing on what would move YOU versus focusing on what would move the decision-maker • Getting bored of your message so making a new one. When you feel like a broken record, you're on the right track	• •
Tools	• Messaging to Win • Spitfire Strategies SMART chart

Evaluating, pivoting & surfing the backlash

Bake constant evaluation into your campaigns

Ongoing monitoring and evaluation of a campaign is essential to its success. If we're succeeding with our efforts, people are responding. How do we respond to these changes, to new opportunities? At what point do we decide to change our strategy if we are not being effective?

Commit to evaluations after every major push or event. Ensure that you/your group do 'check in' strategy sessions quarterly to monitor the effectiveness of your campaign. Judge effectiveness not just by amount of uptake by the media or public interest, but by the words/actions of decision makers and your targets.

- Schedule time for regular assessments.
- Critique is your FRIEND.
- Check egos at door!

What are some things you anticipate coming at you and how might you be able to proactively deflate them or use them to your advantage?

Surf the backlash

You want to create enough interest or controversy or identify the exact right moment in existing discussion that you have the media/decision maker's attention, and then push home your advantage, ride the wave, set the direction and keep the momentum going in order to press for greater change.

What are the predictable attacks, challenges, issues, or roadblocks you're likely to face from your opposition?

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All too often groups plan the breakthrough (report, ad, event) but not what to do once you have everyone's attention. More than we'd care to admit, we plan big breakthrough events/tactics and then head off for vacations right after the event because we're exhausted, causing us to miss the opportunity to lever whatever emerges. But sometimes, the feedback and opposition to your victory is an opportunity to deepen your message and make an even bigger win. Reserve 20% of campaign time to seize opportunities and pivot based on reactions and opportunities. Food for thought: it's not only your opposition who poses challenges or roadblocks for you. Consider your community and allies, who might have similar but not completely overlapping campaigns or work, and what their pressing needs, hopes, and ambitions are that might impede your work. Reach out and be curious about their concerns/issues and to learn how you can lift each other up.	
Now that you've listed potential backlash and challenges, get in front of them:	Values and issues your opponents will bring up: • • • •
	Your messages that address those issues: • • •
	Values you'll center to bolster your message: • • •
Which issues have got you truly stumped, meaning you don't have an answer? (One common example is the challenge of opponents saying that conservation will reduce local jobs.)	
What research do you need to do to be able to address those issues	

head on? Who could help you figure it out? Speak alongside you? Speak for you?

(In the example of jobs, it could be helpful to have someone from another community who was promised job creation due to similar resource extraction, such as a pipeline, share the truth of what really happened and how much long-term sustainability it offered their community.)

Common Pitfalls

- Not planning time for evaluation
- Thinking evaluation needs to be fancy or complicated
- Not consulting your community and other groups working on similar issues
- Giving up on a tactic or strategy because of negative feedback – sometimes negative feedback means it's working (silence is sometimes the scariest response)

Pitfalls you could run into:

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Celebrating Your Successes

Legendary organizer Marshall Ganz says we must do 3 things: meet, act & celebrate. We are generally really bad at the last one. And yet, it's essential for building momentum, growing the tent, and for morale. Everyone wants to be on the winning team! And everyone deserves to be seen and celebrated.

What steps along your campaign journey will you celebrate? How?

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Common Pitfalls

- We forget
- We don't make time
- We don't include our community or allies
- We don't think a small victory is worth celebrating
- Feels false to celebrate a success when there is so much more to do
- We jump straight into taking on the next issue

Pitfalls you could run into:

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Tools

- Schedule celebrations of team members in your regular team meetings
- Put aside a little \$ for celebrations. You can also do this
- Kazoos ;)
- Pizza
- Music
- Chocolate
- Snacks

If you've made it this far, congratulations and good luck with your plans! We're here to support you. And to cheer you on!