

The Difference between a Strategy and a Plan

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Sample Strategy Chart

The word “strategy” is so much in use these days that it can mean almost anything. Little children are taught “strategies” for shoe tying and later for doing homework. As life progresses, we learn “strategies” for success in marriage, finding work, Chinese cooking, and breeding tropical fish. No wonder the word is confusing. Even in the more limited arena of citizen organizing, the language often causes confusion. People talk about a “media strategy,” a “legal strategy,” an “electoral strategy,” or a

“public education strategy,” but all of these are actually tactics, not strategies. We can use the media, the courts, the electoral system, or public education as specific ways to apply pressure to someone, but a strategy is the design of the campaign combined with an analysis of power relationships. Tactics are the individual steps in carrying out a strategy.

In direct action organizing, “strategy” is given a more precise definition.

Strategy

An approach to making a government or corporate official do something in the public interest that he or she does not otherwise wish to do.

The Difference between a Strategy and a Plan

If your objective is anything other than making an official do something, then you don’t need a *strategy*; you only need a *plan*. The difference is that a plan is about the steps you will need to take for any project, while a strategy is about the relationship of power between you and the official. In fact, the word “strategy” comes from the Greek *strategos*, meaning the rank of General in the army.

Developing a Strategy

Whatever you are trying to win, or however you want an elected official to vote on a bill, it is always better if the decision maker voluntarily agrees and doesn't need to be pressured. For that reason, the initial tactics in any campaign usually start with writing a letter and trying to have a meeting and a conversation. Explain how the facts are on your side, why you are morally right, and how much people need the change you are advocating. Even talk about how much it will advance the elected official's career to see the matter your way. Sometimes this works. Often it does not.

When persuasion fails, it may be because the decision maker simply holds a strong opinion that is contrary to yours, but more often, it is because as you were going into his or her office, another group was coming out that was applying pressure from the opposite side. More than likely, the other group represented some private interest. As much as public officials like to pretend that they make up their own minds on policy issues, they are usually bowing to the wishes of special interests that can spend large sums of money to get what they want. When pressure is applied to prevent justice from being done, we must apply counterpressure to ensure that justice prevails. For this, you need more than a plan; you need a strategy.

A strategy is the overall design for building the

power to compel someone to give your organization what it wants. Short-term strategies can cover a period of days or weeks; long-term strategies can continue for many years.

The strategy chart that follows is an extremely useful tool for campaign planning. It lends itself both to overall campaign strategy and to planning of specific tactics such as a public hearing or an accountability session with an elected official. (Yes, you can have a smaller strategy for carrying out a particular tactic.) The chart is valuable as the focal point of a group planning process because it poses the necessary questions in a logical order and moves people through the planning process step by step.

When *Not* to Use the Chart

The chart is intended for campaigns aimed at winning something from someone. It is not useful for election campaigns or referenda where the goal is to get a majority of voters to vote a certain way or for educational campaigns the goals of which are to get people to think a certain way. If, when using the chart, you find yourself writing “the public” or “voters” in the Targets column, you are probably using the chart for the wrong purpose. The chart is also not intended for dealing with the internal problems of your own organization, where its use will exacerbate conflict and lead to a major meltdown.

Preparing to Make a Chart

Developing a strategy chart assumes that your group has already chosen an issue (see previous chapter). In your strategy planning meetings, display the chart prominently on a blackboard or large sheet of paper in the front of the room. Have the following resources on hand to complement the chart:

1. A large map of the area, city, or state in which the campaign will take place. Critical relationships often exist among issues, groups, neighborhoods, geography, and political districts that become apparent only when you look at a map.
2. Overlays for the map (or separate district maps) to show political districts.
3. Election returns for relevant races for the last several years. Knowing voting patterns and totals in primaries and general elections is important to understanding the strength of allies and opponents, even if your organization is not involved in electoral work.
4. When the decision maker, or target, is a member of an elected body it is necessary to have

someone on hand who knows how that body is actually organized internally and how it works. For example, does your City Council member really have any influence or the ability to move a bill, or is he or she just one vote among many?

5. The Yellow Pages to identify potential constituent and opponent organizations.
6. A list of your own board members and, if you are a coalition, your affiliates by address. This suggests people to involve at different points in the campaign.
7. Someone who knows the major institutions in the area, major employers, banks, corporations, public buildings, etc.

Allow several hours to systematically go through the chart, filling in the required information. Some groups take half a day or longer. A good facilitator is important.

If the group is large, split into a few smaller groups. Ask each group to develop a strategy and then incorporate the best ideas from each group in the final chart.

The Five Columns of the Strategy Chart

There are five major strategy elements to consider. Each has a column to fill in on the chart.

1. Long-Term, Intermediate, and Short-Term Goals
2. Organizational Considerations
3. Constituents, Allies, and Opponents
4. Targets (who can give you what you want)
5. Tactics

At first glance, the chart appears to be a series of lists. What we are unable to show on paper, but what becomes clear when you actually use the chart in planning, is that it is more like a computer

Midwest Academy Strategy Chart

After choosing your issue, fill in this chart as a guide to developing strategy. Be specific. List all the possibilities.

Goals	Organizational Considerations	Constituents, Allies, and Opponents	Targets	Tactics
<p>1. List the long-term objectives of your campaign.</p> <p>2. State the intermediate goals for this issue campaign. What constitutes victory?</p> <p><i>How will the campaign</i></p> <ul style="list-style-type: none"> • Win concrete improvement in people's lives? • Give people a sense of their own power? • Alter the relations of power? <p>3. What short-term or partial victories can you win as steps toward your long-term goal?</p>	<p>1. List the resources that your organization brings to the campaign. Include money, number of staff, facilities, reputation, canvass, etc.</p> <p>What is the budget, including in-kind contributions, for this campaign?</p> <p>2. List the specific ways in which you want your organization to be strengthened by this campaign. Fill in numbers for each:</p> <ul style="list-style-type: none"> • Expand leadership group • Increase experience of existing leadership • Build membership base • Expand into new constituencies • Raise more money <p>3. List internal problems that have to be considered if the campaign is to succeed.</p>	<p>1. Who cares about this issue enough to join in or help the organization?</p> <ul style="list-style-type: none"> • Whose problem is it? • What do they gain if they win? • What risks are they taking? • What power do they have over the target? • Into what groups are they organized? <p>2. Who are your opponents?</p> <ul style="list-style-type: none"> • What will your victory cost them? • What will they do/spend to oppose you? • How strong are they? 	<p>1. Primary Targets</p> <p>A target is always a person. It is never an institution or elected body.</p> <ul style="list-style-type: none"> • Who has the power to give you what you want? • What power do you have over them? <p>2. Secondary Targets</p> <ul style="list-style-type: none"> • Who has power over the people with the power to give you what you want? • What power do you have over them? 	<p>For each target, list the tactics that each constituent group can best use to make its power felt.</p> <p>Tactics must be</p> <ul style="list-style-type: none"> • In context. • Flexible and creative. • Directed at a specific target. • Make sense to the membership. • Be backed up by a specific form of power. <p>Tactics include</p> <ul style="list-style-type: none"> • Media events • Actions for information and demands • Public hearings • Strikes • Voter registration and voter education • Lawsuits • Accountability sessions • Elections • Negotiations

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spreadsheet. Whenever you change anything in one column, corresponding changes need to be made in the others. For example, adding another goal may require finding a different type of constituent group that would employ a different tactic against a new target. Mathematical relationships also exist in the chart. Goals must equal power, and tactics must have a cost to the target, for example.

To help illustrate the use of the chart, we will use, among other examples, a hypothetical campaign to win tax reform on the state level.

Let's say that you are the organizer in charge of the campaign. Like many other states, yours has seen a major economic upturn in recent years, but services that were cut during the last recession still have not been restored and the boom is benefiting mainly the rich. The Governor, a middle-of-the-road Democrat, would favor improving services, particularly education, but a large portion of state revenue is coming from regressive sales and excise taxes, which no one wants to increase. Neither is there a desire to raise property taxes, which would fall mainly on the working poor and middle class.

Your organization, the State Citizens Alliance, is a coalition. It includes unions, senior citizen groups, environmentalists, community organizations, low-income organizations, women's organizations, and organizations of People of Color. In addition, the organization has an individual membership of 20,000 people maintained by a professional telephone canvasser. It has a fine track record, having won many statewide legislative battles.

Your organization supports increasing taxes, but you want it done in a progressive way, which puts the burden on large corporations and the rich. You have obtained the assistance of a public interest organization to draft your own tax proposal—the Citizens' Fair Tax Plan—so your technical presentation will be as good as anyone

can produce. You are now ready to plan how to get your proposal passed.

Column 1: Goals

Long-Term Goals

These are the goals that you eventually hope to win and toward which the current campaign is a step. Using our example, your long-term goals might be to have the state budget well funded, to provide the services that the people of the state require, and to obtain this funding through a progressive tax system based on the ability to pay.

The legislation you are now sponsoring won't accomplish all of that; it will only close the budget gap in the short run. Many regressive taxes will still be on the books and the schools will still have problems, but it is a good step.

Intermediate Issue Goals

These are the goals that you hope to win in this campaign. In this example, the intermediate issue goal is the passage of the Citizens' Fair Tax Plan.

Goals must be very specific. If members of a housing group said their goal was fair housing or an environmental organization said ending toxic dumping, such goals would be so general that they only restate the problem. Saying that the goal is "to educate the public" is to mistake a goal for a tactic. Public education is really a tactic and goes in the last column.

(Note: Educating the public can be a deceptive concept. How do you know when you have accomplished it? When is the public educated and how educated has it become? Beware of any activity that requires spending money with no way to measure the result.)

Remember, a goal is always something that you win from someone. Test the intermediate goal—are they specific steps toward your long-term goals? Do they meet the three major criteria for choosing an issue? Do they:

1. Win real improvements in people's lives?
2. Give people a sense of their own power?
3. Alter the relations of power?

What does it mean to win? How will you know when you have won?

Short-Term Issue Goals

Short-term issue goals are steps toward your intermediate goals. You don't always necessarily have to have short-term issue goals, but in big issue campaigns they are useful for two reasons: First, few groups are strong enough to win a major campaign without a period of building power. They must win the support of individual officials and increase power at local levels of government. Second, just to sustain your organization in a long campaign, people must see small victories along the way.

Short-term issue goals for the Citizens' Fair Tax Plan campaign might be to obtain the endorsement of City Councils or County Commissions around the state and to move from there to asking members of the legislature to pledge that they agree in principle with the idea of progressive taxation before your bill comes out. Or you might launch a campaign for twenty-five cosponsors from targeted districts.

For a local community organization working on a neighborhood issue, the short-term issue goal might be just to get a meeting with the City Council member. When people see that the organization can do that much, they will be ready for the next step, perhaps a meeting with the Mayor. (If someone gets up at your first meeting and says, "Oh, the Mayor is a friend of mine; I can get you a meeting anytime," don't accept. The point is that the group must feel that it collectively won the meeting because of its strength. If the meeting comes about because of one person's personal relationship, the stature of that individual is built up, but the group isn't

Sample Goals Column

1. Long-Term Goals

- State budget well funded by a progressive tax system.
- Full funding of schools by the state.

2. Intermediate Goals

- Pass the Citizens' Fair Tax Plan.
- Win support of key legislative leaders from the 5th, 7th and 14th districts, or develop an anti-Fair Tax record for future races.

3. Short-Term Goals

- Public support from local officials.
- Line up influential sponsors in House and Senate by April.
- 25 cosponsors by June 1.

strengthened. And it is likely that nothing will come of the meeting.)

Sometimes, before you can even decide on the intermediate goals, more information about a problem is needed. Then, short-term goals might consist of making an agency compile or release information. For example, a citizen organization concerned about crime against seniors had to make the Police Department keep crime statistics by age just to prove that the problem existed. Sometimes, short-term goals will be electoral. For example, a specific person must be removed or more forceful leadership elected.

While listing goals, consider what the cost to the target will be if you win. Who will pay? What is it worth to someone to defeat you? Knowing this helps you to get a sense of how much money is likely to be spent on defeating you. It also gives you a better idea of who will end up as allies or opponents.

When you are finished listing your goals, have the group put them more or less in the order in which they will have to be achieved.

1. Win real improvements in people's lives?
2. Give people a sense of their own power?
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Sample Organizational Considerations Column

1. Resources To Put In

- Salaries and expenses for six months = \$45,000. On hand = \$10,000. To raise = \$35,000.
- Staff
 - Mary—Lead Organizer, full time
 - Fred—Organizer, half time
 - Sam—Support Staff, 1 day a week
 - Liz—College intern, 1 day a week
 - Kate—Supervisor, 4 hrs a week(cash value of staff time = \$40,000)
- Phone canvass. Approx. 5 canvassers.
- 7 board members on the tax committee. Each represents an affiliate organization.
- Committee chair. Very active. Good spokesperson.
- Lobbyist from allied union.
- Tax expert contributed to us by Citizens for Tax Neatness.
- Office space and phones for all staff (cash value = \$700).
- 1 Xerox that works, 1 that sort of works. 2 computers. (cash value for use = \$200)
- Good relations with press. Abner Berry at the *Sentinel* and Al Ferman at the *Herald*.

2. What We Want to Get Out of It

- Make back all expenses (\$45,000) through contributions from affiliates and campaign fund-raising.
- 4 new affiliates. Most likely choices are Carver City Taxpayers Against Waste, Newton Teachers Local 310, Association of Child Service Providers, Gotham City Save Our Schools Committee
- Build a base in the 5th, 7th, and 14th districts. Promote George, Frieda, and Kim as respective spokespersons.
- Develop 15 active volunteers.
- Develop ways to activate 15,000 canvass members in key districts.

3. Problems to Solve

- Rivalry between teachers' unions may erupt. —Meet with them. Ask them to keep turf fight out of it.
- Uptown Seniors don't like Downtown Seniors. —Hold separate meetings in each community.
- Fred says that Mary whistles through her nose all day and he can't work in the same office with her. —Seek treatment for Fred since no one else ever hears Mary do this.

Column 2: Organizational Considerations

This column is essentially an organizational expense and income statement. You will list what resources you have to put into the campaign (expenses), what organizational gains you want to come out of the campaign (income), and internal problems that have to be solved.

Start with resources. This is essentially your campaign budget. Consider these to be expenses or, better yet, investments. Be very specific, particularly about staff time and money. List names.

Make sure that the people working on your campaign are in the room when you talk about how much of their time is going into the campaign. "Full time" for example, means that a person has no other responsibilities. Don't be one of those groups where the organizer works "full time" on each of five campaigns at once.

List the amount of money you are putting into the campaign and the amount that needs to be raised. Then, put a fair market cash value on the in-kind contributions you are making, including

staff time, rent, and postage. Unless you do this, your allies, affiliates, and members will never have any idea of the size of your real contribution, and neither will you.

In the second part of the column, list everything that the organization wants to get out of the campaign, in addition to winning the issue. Consider this income, and plan to make a “profit” that is to build your organization through both internal development and fundraising. Again, the point here is to be very specific. How many new affiliates, new members, or leaders? Name them if possible. How much money raised? Put in an amount. Do you want more media recognition for your group? Where? How often? The purpose of being specific goes beyond setting objectives. To reach the objectives, you will need corresponding tactics and sometimes corresponding targets and constituencies. If one organizational objective is to get into the newspapers once a week for a month, then in the Tactics column you will have to plan to have at least one media hit a week. If the local paper is strongly Republican and so is the Mayor, then your attacks on the Mayor may not be covered. You will have to find an additional target, perhaps a City Council committee chair, in order to meet the objective of increased media coverage. If another organizational objective is to increase by four the number of People of Color in leadership, then more organizations to which People of Color belong may need to be added to the Constituents column. All of the columns of the chart are wired together in these ways.

The last part of this column lists internal problems that will have to be considered or solved in the course of the campaign. Here, “internal” implies problems within your organization (e.g., staff relationships), problems within your coalition, and problems within constituent organizations.

Column 3: Constituents, Allies, and Opponents

Constituents and Allies

This column is where you answer the questions, who cares about this issue, what do they stand to win or lose, what power do they have, and how are they organized? A constituency is a group of people, hopefully already organized, whom you can contact and bring into the campaign. In filling out this column, be expansive, even far-fetched. The idea is to come up with a long list of potential constituents. During the campaign you may not contact all of them, but you can come back to the list later if events bog down and you need additional support. The difference between *constituents* and *allies* is that constituents are potential members of your organization, while allies are not. Students might be allies in a senior-led campaign for more frequent bus service. Other senior clubs would be constituents.

When you start drawing up the list for the Citizens’ Fair Tax Plan campaign, the first groups that come to mind are public employee organizations. Some taxpayer groups will be very Right Wing, but some could join you. Clearly, organizations that receive services or funding from the state will also be interested in improved funding. Examples include seniors and day-care providers.

The problem is that in the face of a general sentiment in the state that favors sales taxes over income taxes, this list is too short. Additional constituents will be homeowners and parents, but to bring them in, the goals of the campaign will have to be expanded to include property tax relief and school funding. (This is another example of how the chart is like a computer spreadsheet. When you change one column, changes are required in others, but they don’t happen automatically as they do in a spreadsheet.) The next question is, how are homeowners and parents

Sample Constituents, Allies, and Opponents Column

1. Constituents and Allies

- State Teachers Union: 7,000 members
Local 210 Gotham City
Local 113 Newton
Local 69 Butler
Local 666 Spuyten Duyvil
- State Teachers Association:
12,000 members
List locals
- State Public Employees Union:
14,000 members
List locals
- State Labor Federation:
40,000 members
List active locals and labor councils
- Association of Day Care Centers: 1,200 members
- State Senior Council: 3,000 members
Clubs in
Parker (5th District)
Gotham
Newton (7th District)
Salem
Winchester (14th District)
Westchester
- Council of Home Health Care Providers
- Newton Council of Civic Associations
- State Alliance of PTAs
- Taxpayers Union: 2,000 members

2. Opponents

- Chamber of Commerce
- Bankers Association
- Insurance Industry Council
- Johnson Corp.
- Taxpayers Association of Hatemail
- etc., etc.

organized? Condo associations, particularly those with many seniors, could be an important constituency and are often better organized than neighborhood civic associations. You would have to be sure that your proposed legislation's benefits for homeowners included condominium

owners. PTAs are the logical place to find parents, but larger numbers of parents may be found in religious congregations.

Even if your organization has individual members rather than being a coalition, it is still useful to think of people as parts of groups. For example, say that you are working on a public transportation issue and decide that senior citizens are a possible constituency. You could list seniors on the chart, but that won't tell you how to reach them. Instead, be more specific. Say, "Seniors who ride the #1 and #2 buses." That, at least, leads you to leafleting bus stops on those lines. It would be much better, however, to look at the transit map or the Yellow Pages to see what senior centers are served by those lines. Don't overlook congregations that might have senior clubs. Mark them on a map. Put them on the chart by name. Go and visit them.

Look for constituencies that are less than obvious. On the tax issue, realtors or real estate associations might join with you because value is added to the houses they sell if property taxes don't rise and the school system is good.

Think of each constituent group as the hub of a wheel. Then look at the spokes. Who cares about these people? Who does business with them? Who provides services to them? Who lends them money? Who borrows their money (banks, insurance companies)? For whom do they vote? If they had more money to spend, where would they spend it? Who would get it (local merchants or Swiss banks)? What organizations or congregations do they belong to? Looking at your possible constituents in this way, it is easy to see that the self-interest of one group affects the self-interest of many others and may create still more constituents for the campaign.

While it is necessary to think about potential areas of conflict between the groups, remember that people don't all have to love each other, agree on tactics, or even sit in the same room in

order to support the same issue. In fact, sometimes the issue brings them together. This was the case in the classic campaign against the Chicago Crosstown Expressway. The proposed expressway route ran through different ethnic communities. One White group came with signs saying “Black Roads, White Lines United Against the Crosstown.”

Mark your list according to whether the constituency is organized or unorganized—that is, homeowners associations in the Humboldt Park area, as opposed to individual homeowners. Then rank the groups according to the power they bring to the campaign. Consider the following:

- How many members do they have?
- Did they work or vote for the incumbent office holder?
- Do they make political campaign contributions?
- Will they give money to your issue campaign?
- Do they bring special credibility? (Clergy)
- Do they have special appeal? (Children)
- Are they part of a larger organized network? (Veterans)
- Do they have a reputation for being tough? (Unions)
- Do they have special skills? (Lawyers)
- Are they considered particularly newsworthy? (Penguins)

Last, examine the weaknesses of each constituency. Look at their reputations, past history, and the enemies that you might inherit by linking up with them. If the target is an elected official, then constituents will have very little power who never voted for her and never will. If consumer power is to be used against a corporation, then constituents must be customers of that company.

Opponents

List all the groups, individuals, and institutions that stand to lose or be very upset if you win. What

will your victory cost them? Try to evaluate how actively each will oppose you and what they will do or spend to defeat you. In a few cases you may find ways to neutralize them, but even if you can do nothing, it is best to have some idea of what to expect as the campaign unfolds. List the power of each opponent. How does the strength of your constituents stack up against the strength of your opponents in the eyes of the people who can give you what you want? Generally avoid engaging opponents during the campaign. They can't give you what you want, and you have no influence over them anyway. Don't even hold debates with them unless you expect to win over larger numbers of their base. In most campaigns, your opponents have you outspent and outstaffed; spending time on them just diverts you from the real targets. This is not to say that opponents don't matter or that we should not be concerned about their strength, only that challenging them directly can be a diversion.

Column 4: Decision Makers (Targets)

Primary Decision Makers

The person with the power to give you what you want is often referred to as the “target” of the campaign. This does not necessarily imply that the person is evil. It simply means that by virtue of having the power to give you what you want, that person is the focus of the campaign. Some groups prefer to say “decision maker.”

The decision maker is always a person. “Personalize the target” is a fundamental rule of organizing. Even if the power to give you what you want is actually held by an institution such as a City Council, a board of directors, the legislature, the Police Department, or the Environmental Protection Agency (EPA), personalize it. Find out the name of the person(s) who can make the decision or at least strongly influence it. Make that person the target. Not only does this help to narrow the focus of the campaign, but it makes your

Sample Targets Column

1. Primary Targets

- Governor Winthrop
- House Tax Committee Chair Rep. Bacon (5th District)
- Senate Committee Chair Rep. Lax
- Committee members, to be determined
- Other legislators, to be determined

2. Secondary Targets

- G. Groggy—Union County Dem. Chairman—includes 14th Dist.
- R. Waterdown—Kent County Dem. Chairman—includes 7th Dist.
- Selected campaign contributors to individuals listed above
- County Commissioners in the counties containing target districts

members feel that winning is possible. A campaign to change a person's mind is much more believable than one to change the policy of a big institution. In addition, individual decision makers have human responses such as fairness, guilt, fear, ambition, vanity, or loyalty. These do not exist in institutions or formal bodies as a whole. Such responses can only come into play if you personalize the target.

When filling out this column, list all the possible people who can give you what you want. Try to include more than one of them because where power is divided, usually more weak spots and openings exist. Also, multiple targets provide an opportunity to sustain the campaign over a longer time. This allows you to build strength. In many types of campaigns, time is on your side if you can hold out. This is particularly true if you are trying to stop expensive structures from being built or large sums of money from being spent. A long campaign may also help you to keep the issue alive until an election intervenes or a court decision is

handed down. List the reasons that each target is likely to oppose you as well as to agree with you. List your power over each target. Go back to the constituency list and consider how to match the power of each constituency against the vulnerabilities of the targets. In campaigns aimed at legislators, think about who are the pro and anti swing voters. Sometimes it is sufficient to win over the swing voters if they represent the balance of power. In that case, you don't have to reach everyone.

Secondary Targets

A secondary target is a person who has more power over the primary decision maker than you do but whom you have more power over than you have over the primary decision maker.

Tenants in public housing wanted their buildings painted. The tenants made several members of the City Housing Authority their primary targets. When the tenants discovered that old lead paint was peeling off the walls, they made the head of the Health Department a secondary target. She didn't care about the tenants' dispute with the Housing Authority, but lead was a health hazard that had to be corrected. She told the Housing Authority that the walls must be scraped and repainted.

When you list secondary targets, write down what power you have over them and what power they have over the primary target.

In the Fair Tax campaign, the targets are determined by an analysis of the legislature. Clearly, the Governor will be a target, as will the heads of key committees. Once the legislation is introduced and a head count taken of committee members and the legislature as a whole, specific members will be targeted as well. Secondary targets for this campaign might include officials such as county chairs of the Democratic and Republican parties, lower-level elected officials,

campaign contributors, or volunteer coordinators, provided they either agree with you or you have some power over the target.

When dealing with corporations, a large purchaser can be a good secondary target. Look to see if the corporation has government contracts. If so, the public officials who can end the contracts become secondary targets.

You may not need to have a secondary target if you have power over the primary one.

Column 5: Tactics

Tactics are steps in carrying out your overall plan. They are the specific things that the people in the Constituency column do to the people in the Targets column to put pressure on them. When you list tactics, write down who will do what and to whom.

The Tactics column is always filled out last to avoid the common tendency to jump to tactics as soon as the issue is chosen. ("Let's all go to Mayor Gold's office with a goldfish and a sign that says 'All that glitters is not Gold.'") Tactics should never be planned in isolation from the larger strategy of which they must be a part. One statewide healthcare advocacy group heard that its counterpart in another state had held a very successful statewide lobby day that helped to pass a piece of legislation. The group decided that it too should host a lobby day, but when the time came it had no bill to support and nothing to advocate for. A lobby day without a bill is a classic example of a tactic without a strategy.

For every tactic, there must be

- Someone who does it.
- Someone to whom it is done.
- Some reason why the person to whom it is done doesn't want it done and will make a concession to you if you stop doing it.

Sample Tactics Column

(Listed more or less in the order in which they might actually be used)

- Media hits. Feature unjust tax distribution between homeowners and EXXON refinery.
- More media hits. Spotlight education cuts. Kids come with symbols of cut programs, e.g., sports equipment, musical instruments.
- Do same day in four cities with teacher organizations and PTAs.
- Make this an issue in the next gubernatorial primary.
- Start postcard campaign for fair taxes.
"Dear Gov., When my income goes over \$200,000, I will happily pay higher taxes if you enact them now."
- Media hit in capital to release detailed Fair Tax Plan. Sponsors and cosponsors on hand.
- Canvassers start petition drive in targeted districts.
- Media hits in targeted districts to announce formation of district Fair Tax committees to put legislature on the spot. Show petitions.
- Delegation meetings to get position of targeted legislators.
- Local hearings. Either sponsors hold them officially or we hold them. Aim for high turnout.
- Additional delegation meetings in target district. Service providers, seniors, clients of programs are included.
- Save our school. Rallies and picnics. Fund-raiser.
- TV debate between our leader and legislative opponents.
- Tax bill burning day when tax bills are sent out.
- Accountability sessions in targeted districts, particularly the 5th, 7th, and 14th districts.
- Mass lobby day in capital when bill comes up for vote. Governor invited to speak for the bill. Empty chair if he doesn't. Invite potential opponents.

Tactics should be fun. They should be within the experience of your members but outside the experience of your targets. Every tactic has an element of power behind it. None should be purely symbolic. Different tactics require different levels of organizational strength and sophistication to use. For that reason, some work better at the beginning of a campaign and some can be used only later, after a certain level of strength is reached.

Notes on Tactics

Media Events

Media events are designed to get press and TV coverage. As stand-alone events, they are usually used at the start of the campaign to dramatize the issue and announce that the organization is working on it. Later in the campaign, the media will be used in conjunction with other tactics. A media event might consist of releasing information or a study, demanding information, having victims tell their stories, and making demands on the target.

For the Fair Tax Campaign, an opening media event might be held in front of property owned by a large corporation. The percentage of income paid in taxes by the corporation could be contrasted to that paid by nearby homeowners, who would bring big enlargements of their tax bills to display to the press. The media event should not simply be an attempt to educate the public. Remember, it is a tactic and tactics are done to someone. If the legislators in whose district the corporation is located don't support the Fair Tax Bill, make that part of the media hit. If the corporation gave them campaign contributions, that is also news.

The press usually responds well to something visual and funny or dramatic. One citizen organization wanted to dramatize that the rising cost of auto insurance was forcing people to choose between paying for their homes or their cars. The

group built a home inside a car with the toilet in the trunk. The press loved it.

If the media event features groups such as low-income people, the homeless, the unemployed, or striking workers, be sure that they are presented with dignity and as whole people asking for the same rights that others enjoy. They are not objects of pity, nor are they looking for a handout.

Actions

Actions are a particularly useful tactic for local organizations, especially toward the start of a campaign. In an action, a group of people confront a target and make specific demands. They expect to get an answer on the spot. Organizations usually start with procedural demands such as asking for an appointment with someone or that a hearing be held. They also might ask for the release of information, the publication of rules, or time on the agenda. Later, when the group is stronger, actions might be used to win some of its main demands.

Actions often involve the media, but they are not media events. That is, the objective is not simply to get covered in the media but to use additional power to win something. The organization's power may be the number of participants or the size of the constituency they represent, their ability to embarrass the target with information they have uncovered, or their ability to cause the target political harm if the target is a public official, or financial harm if a business.

Public Hearings

You might demand that the target hold an official public hearing, but consider holding your own hearing in which a panel of community leaders and allied political leaders listens to testimony from your constituency. Often a report is issued. The hearing serves to educate, get publicity, put opponents on the spot, and establish your organization as a leading force on the issue.

Accountability Sessions

Accountability sessions are large meetings with elected officials. They are sponsored by you and held on your turf. Several hundred people come to tell the official what they want done. The official is asked to respond at once.

Elections

Depending on what type of organization you are, you may actually endorse candidates. Even if you don't, you usually have more leverage in the weeks before an election because candidates are more vulnerable then.

Negotiations

Issue campaigns usually end in some form of negotiation. You must have shown considerable power to get the other side to agree to talk. If your target offers to negotiate too easily or too soon, watch out! It may be a device to make the other side look reasonable without any serious concessions being made. (But don't automatically assume that every offer is some kind of trick. Some groups "snatch defeat out of the jaws of victory" because they can never believe that they actually won.)

The next chapter explores some of these and other tactics in greater detail.

Using the Chart

The strategy chart can be used to plan organizational development as well as issue campaigns. The starting point in the chart is determined by the type of planning you are doing. For example, to plan an issue campaign, work from left to right. To plan the start-up of a new organization, say, a new senior citizen coalition, begin at the lower half of the Organizational Considerations column. Write down how many senior clubs you want to have affiliated and specific goals to make the coalition diverse and inclusive. Then, skip to

the Constituents column and list all the existing clubs that could potentially join the coalition. Note the ethnic characteristics of each. Next, go back to the Goals column and with the objective of diversity in mind, decide what issues would appeal to the clubs. From there, go to the Targets and then to the Tactics columns.

One reason that the chart works in so many ways is that an organization is literally the product of what it does. Once you are clear on what you want your organization to be, you can work backward toward shaping the group in the desired direction.

An example of a complete strategy chart that shows all five of the sample columns presented earlier for the tax campaign appears at the end of this chapter.

The two questions most frequently asked about the strategy chart:

Question: In which column do I put an activity such as getting more publicity for my organization? Is that a Goal, an Organizational Consideration, or a Tactic?

Answer: Nothing goes in the Goals column unless you intend to win it from someone. Tactics are always done by someone to someone, so a media event aimed at a target goes under Tactics. Getting publicity in general is an Organizational Consideration.

Question: Exactly what is the relationship between the columns of the chart?

Answer: Tactics are what people in the Constituency column do to the people in the Targets column to make them give the organization the things in the Goals column so as to build the organization as outlined in the Organizational Considerations column.

Timelines

To finish the planning process, make timelines for the campaign. Include all the major campaign events and deadlines for preparing the publicity for each. Be sure to include the key dates in the electoral process. Even if you are not involved with candidates, note information such as when voter registration starts and ends, when nominating petitions start circulating, when petitions must be filed for major party candidates and independents, when candidate fundraising reports must be filed (you may want to look at them), and of course, all election dates. Also note when appropriate legislative bodies are in ses-

sion, when members of Congress and the legislature are home for recess, and when major civil, religious, and school holidays occur. Timelines also help you sort through too many good ideas. The first tactics list that most groups create is a brainstorm list with little relationship to a group's limited resources. A timeline that includes "who will do what by when" helps the group be more realistic about what it can do.

You might want to develop a multitiered timeline, which can help in planning activities that build on something already scheduled or indicate where too much is going on at one time and something needs to be rescheduled. An example of such a timeline is as follows:

	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec
Organization												
City Council												
State Leg.												
Congress												
Elections												
Fundraising												
Other												

Midwest Academy Strategy Chart for "Fair Tax Campaign"

Goals	Organizational Considerations	Constituents, Allies, and Opponents	Targets	Tactics
<p>1. Long-Term Goals</p> <ul style="list-style-type: none"> State budget well funded by a progressive tax system. Full funding of schools by the state. <p>2. Intermediate Goals</p> <ul style="list-style-type: none"> Pass the Citizens' Fair Tax Plan. Win support of key legislative leaders from the 5th, 7th and 14th districts, or develop an anti-Fair Tax record for future races. <p>3. Short-Term Goals</p> <ul style="list-style-type: none"> Public support from local officials. Line up influential sponsors in House and Senate by April. 25 cosponsors by June 1. 	<p>1. Resources to put in</p> <ul style="list-style-type: none"> Salaries and expenses for six months = \$45,000. On hand = \$10,000. To raise = \$35,000. Staff Mary—Lead Organizer, full time Fred—Organizer, half time Sam—Support Staff, 1 day a week Liz—College intern, 1 day a week Kate—Supervisor, 4 hrs a week (cash value of staff time = \$40,000) Phone canvass. Approx. 5 7 board members on the tax committee. Each represents an affiliate organization. Committee chair. Very active. Good spokesperson Lobbyist from allied union Tax expert contributed to us by Citizens for Tax Neatness. Office space and phones for all staff (cash value = \$700). 1 Xerox that works, 1 that sort of works. 2 computers. (cash value for use = \$200) Good relations with press. Abner Berry at the <i>Sentinel</i> and Al Ferman at the <i>Herald</i>. <p>2. What We Want to Get Out of It</p> <ul style="list-style-type: none"> Make back all expenses (\$45,000) through contributions from affiliates and campaign fund-raising. 4 new affiliates. Most likely choices are Carver City Taxpayers Against Waste, Newton Teachers Local 310, Association of Child Service Providers, Gotham City Save Our Schools Committee Build a base in the 5th, 7th, and 14th districts. Promote George, Frieda, and Kim as respective spokespersons. Develop 15 active volunteers. Develop ways to activate 15,000 canvass members in key districts. <p>3. Problems to Solve</p> <ul style="list-style-type: none"> Rivalry between teachers' unions may erupt. —Meet with them. Ask them to keep turf fight out of it. Uptown Seniors don't like Downtown Seniors. —Hold separate meetings in each community. Fred says that Mary whistles through her nose all day and he can't work in the same office with her. —Seek treatment for Fred since no one else ever hears Mary do this. 	<p>1. Constituents and Allies</p> <ul style="list-style-type: none"> State Teachers Union: 7,000 members Local 210 Gotham City Local 113 Newton Local 69 Butler Local 666 Spuyten Duyvil State Teachers Association: 12,000 members List locals State Public Employees Union: 14,000 members List locals State Labor Federation: 40,000 members List active locals and labor councils Association of Day Care Centers: 1,200 members State Senior Council: 3,000 members Clubs in Packer (5th District) Gotham Newton (7th District) Salem Winchester (14th District) Westchester Council of Home Health Care Providers Newton Council of Civic Associations State Alliance of PTAs members <p>2. Opponents</p> <ul style="list-style-type: none"> Chamber of Commerce Bankers Association Insurance Industry Council Johnson Corp. Taxpayers Association of Hatemall 	<p>1. Primary Targets</p> <ul style="list-style-type: none"> Governor Winthrop House Tax Committee Chair Rep. Bacon (5th District) Senate Committee Chair Rep. Lax Committee members, to be determined Other legislators, to be determined <p>2. Secondary Targets</p> <ul style="list-style-type: none"> G. Groggy—Union County Dem. Chairman—includes 14th Dist. R. Waterdown—Kent County Dem. Chairman—includes 7th Dist. Selected campaign contributors to individuals listed above County Commissioners in the counties containing target districts 	<p>(Listed more or less in the order in which they might actually be used)</p> <ul style="list-style-type: none"> Media hits. Feature unjust tax distribution between homeowners and EXXON refinery. More media hits. Spotlight education cuts. Kids come with symbols of cut programs, e.g., sports equipment, musical instruments. Do same day in four cities with teacher organizations and PTAs. Make this an issue in the next gubernatorial primary. Start postcard campaign for fair taxes. "Dear Gov., When my income goes over \$200,000, I will happily pay higher taxes if you enact them now." Media hit in capital to release detailed Fair Tax Plan. Sponsors and cosponsors on hand. Canvassers start petition drive in targeted districts. Media hits in targeted districts to announce formation of district Fair Tax committees to put legislation on the spot. Show petitions. Delegation meetings to get position of targeted legislators. Local hearings. Either sponsors hold them officially or we hold them. Aim for high turnout. Additional delegation meetings in target district. Service providers, seniors, clients of programs are included. Save our school. Rallies and picnics. Fund-raiser. TV debate between our leader and legislative opponents. Tax bill burning day when tax bills are sent out. Accountability sessions in targeted districts, particularly the 5th, 7th, and 14th districts. Mass lobby day in capital when bill comes up for vote. Governor invited to speak for the bill. Empty chair if he doesn't. Invite potential opponents.

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Midwest Academy Strategy Chart

After choosing your issue, fill in this chart as a guide to developing strategy. Be specific. List all the possibilities.

Goals	Organizational Considerations	Constituents, Allies, and Opponents	Targets	Tactics
1. List the long-term objectives of your campaign. 2. State the intermediate goals for this issue campaign. What constitutes victory? <i>How will the campaign</i> <ul style="list-style-type: none"> Win concrete improvement in people's lives? Give people a sense of their own power? Alter the relations of power? 	1. List the resources that your organization brings to the campaign. Include money, number of staff, facilities, reputation, canvass, etc. What is the budget, including in-kind contributions, for this campaign? 2. List the specific ways in which you want your organization to be strengthened by this campaign. Fill in numbers for each: <ul style="list-style-type: none"> Expand leadership group Increase experience of existing leadership Build membership base Expand into new constituencies Raise more money 3. List internal problems that have to be considered if the campaign is to succeed.	1. Who cares about this issue enough to join in or help the organization? <ul style="list-style-type: none"> Whose problem is it? What do they gain if they win? What risks are they taking? What power do they have over the target? Into what groups are they organized? 2. Who are your opponents? <ul style="list-style-type: none"> What will your victory cost them? What will they do/spend to oppose you? How strong are they? 	1. Primary Targets A target is always a person. It is never an institution or elected body. <ul style="list-style-type: none"> Who has the power to give you what you want? What power do you have over them? 2. Secondary Targets <ul style="list-style-type: none"> Who has power over the people with the power to give you what you want? What power do you have over them? 	For each target, list the tactics that each constituent group can best use to make its power felt. Tactics must be <ul style="list-style-type: none"> In context. Flexible and creative. Directed at a specific target. Make sense to the membership. Be backed up by a specific form of power. Tactics include <ul style="list-style-type: none"> Media events Actions for information and demands Public hearings Strikes Voter registration and voter education Lawsuits Accountability sessions Elections Negotiations

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