



The Leadership  
Conference  
Education Fund

# GRASSROOTS CAMPAIGNS & ADVOCACY

## SECTION 2: DEVELOPING STRATEGY





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The Leadership Conference on Civil and Human Rights is a coalition charged by its diverse membership of more than 200 national organizations to promote and protect the rights of all persons in the United States. The Leadership Conference works toward an America as good as its ideals.

The Leadership Conference Education Fund is a 501(c)(3) organization that builds public will for federal policies that promote and protect the civil and human rights of all persons in the United States.

Access this material online at [http://www.civilrights.org/action\\_center/toolkit](http://www.civilrights.org/action_center/toolkit).



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Dear Friend:

This toolkit was put together with you in mind. Its purpose is to educate, equip, encourage, and empower you to make change.

Our goal is to provide you with the basic structure and strategies needed to plan and carry out an effective grassroots public education or advocacy campaign. It's possible to write an entire book on each of the areas covered in this toolkit—in fact, many have been written. But you don't have to read half a dozen books to put together a smart campaign.

What you need to do is establish your goals, create a strategy, make a step-by-step plan, and mobilize the people, partners, and resources to make it all achievable. This toolkit is meant to be a concise guide to accomplishing that. And we include plenty of suggested resources if you want more in-depth information.

The Leadership Conference on Civil and Human Rights and The Leadership Conference Education Fund provide leadership and coordination to coalition efforts and support the work of national and local partners by providing strategic and

technical assistance, preparing materials, offering training, and identifying resources to support coalition efforts. Information on training for grassroots advocacy is provided by The Leadership Conference; information relating to education and coalition building is provided by The Education Fund.



We believe in the power of coalitions to bring people together for a common purpose. History shows that change can be made when diverse voices unite around a shared goal. We hope you will consider us your partners in making needed change happen. You can learn more about our work at <http://www.civilrights.org>. You can also reach The Leadership Conference field staff at 202-466-3315 or at [grassroots@civilrights.org](mailto:grassroots@civilrights.org).

Have fun!

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# The Leadership Conference on Civil and Human Rights Field Department

The Leadership Conference on Civil and Human Rights Field Department (the field team) provides grassroots consultation, advocacy coordination, support, and assistance to national, state, and local organizations regarding field campaigns around important civil and human rights issues. The team is based in Washington, D.C., with a satellite office in Atlanta, Georgia.

## Overview of National, State, and Local Work

Nationally, the field team convenes and provides field outreach and guidance to the coalition's more than 200 national civil and human rights organizations on a broad range of issues. With that focus, the field team provides field outreach and advocacy, and public education campaign guidance, on a broad range of issues.

For example, through national coalition efforts, the field team has played a role in implementation of field campaigns for legislative victories, including: the Americans with Disabilities Act Amendments Act of 2008, the Lilly Ledbetter Fair Pay Act of 2009, the Matthew Shepard and James Byrd, Jr. Hate Crimes Prevention Act of 2009, and the Dodd-Frank Wall Street Reform and Consumer Protection Act of 2010.

Further, when resources permit, the field team works in collaboration with local organizations to conduct national direct-service, public outreach campaigns such as the Digital Television Transition (DTV) campaign or the 2010 Census education campaign.

The field team also works throughout the country with local organizations to provide assistance and support to local coalitions' work in their communities. This support includes field outreach and advocacy,

and public education campaign guidance. The team collaborates with leaders in states including: Arizona, Colorado, Georgia, Maine, Mississippi, Nebraska, Pennsylvania and Texas. As just one example, in Nebraska, the field team has worked with coalitions to preserve equal opportunity, as well as judicial nominations and immigration reform education.

In concert with The Leadership Conference's policy and communications departments, the field team works proactively to create rapid response mechanisms on important federal civil and human rights issues with national coalitions in Washington D.C., and state and local coalitions in key states.

## Support Provided to National and State Coalition Members

The field department is proud to offer an array of services to both national and local partners to help support their work. These services include:

- Strategic Campaign Development, Guidance, and Execution (when applicable)
- Webinars, National Conference Calls, and Legislative Updates
- Legislative Email Action Alerts
- Trainings and Workshops on Coalition-Building, Community Outreach, Grassroots Advocacy, and Key Civil and Human Rights Issues
- Media Readiness Training (in conjunction with the Communications Department)
- Educational Material Development, Grassroots Toolkit, Resource Guides, and Fact Sheets
- Support in Organizing Press Briefings, Lobby Days, and Coalition Convenings

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# DEVELOPING STRATEGY

Once you have clarified the goals and objectives of your campaign, it's time to work on a strategy that will get you there. Strategic planning is the bridge between setting your goals and taking action. Creating a strategic plan may sound intimidating, but it's just a process of thinking through and mapping out the steps it will take for you to achieve your objectives and reach your goals.

The strategies you identify for your campaign will determine which types of campaign tactics you use and how you deploy them. Some campaigns may depend on generating intense media attention or mobilizing a specific constituency. Other campaigns may depend more on working behind-the-scenes to influence key decision makers. There's no single campaign template. But there are a set of questions to ask that will help you prepare and implement a strategic plan.

It's a good idea to make strategic planning a small team project. Effective strategic planning is hard to do in a large group setting. Gather a few people who are committed to your goals, understand the climate you'll be working in, and know some of the important decision makers. This should be a small group of people who can work well together and who can trust each other with frank opinions and honest disagreements.

## Ask the Right Questions

Developing a strategic campaign plan is a process of asking and answering a set of essential questions. As you ask and honestly answer these questions, you may find yourself needing to revise or clarify your goals as well as the important intermediate objectives.

### ***Who are the decision makers?***

Look at your goal(s) and identify the people and/or institutions that have the power to make the change you are seeking. If you're trying to win passage of a law at the state or federal level, identify the people who will determine whether or not you will succeed:

- Who is in the best position to introduce the measure?

- Which committee or committees will have to approve your bill or can include your provision in broader legislation?
- Who leads those committees?
- Who are the other influential committee members?
- Who has the credibility and influence to be an effective sponsor or public spokesperson for the measure?
- Which respected legislators can help you get a majority to support your bill?

And, of course, in a campaign focused on legislation, the governor or president will decide whether to sign or veto the law.

Your campaign might not be about a legislative change. You may, for example, want a state or federal agency to adopt a regulatory change. You may want to push an agency to do its job better—to more effectively enforce voting rights provisions, exercise better oversight for recipients of social service funding, or better publicize the availability of resources for low-income families. The first question to ask is always the same: who are the important decision makers?

- Which agency is in charge?
- Who in that agency has the ability to move your proposal forward?
- Who is the ultimate decision maker?
- What official process do they have to follow? For example, if you are seeking a change in agency policy, does an official have the authority to make that change on her own? Is there a formal process, with opportunity for public input? Is there an appeals process that you (or your opponents) may employ?

### ***What do they think about your issue?***

Once you've identified the key decision makers, pull together what you know about their record and positions:

- What is their voting record?

- What is their record on issues similar to your campaign?
- What kind of public statements have they made?
- Have you or any of your colleagues had a private conversation with them?

If you're a seasoned activist who has worked on an issue for a long time, you may already have this information in hand. If not, you may be able to find much of it with electronic searches of news articles or an agency's public records. If you don't feel confident working with electronic databases, ask a librarian for suggestions.

You can also take a direct approach: call the office of a public official and ask if they have a position for or against a particular piece of legislation. If you write a letter to a public official asking the same information, the written response, even if it's just a form letter, can let you know where they stand and what kind of public explanation they are giving for the position they take.

### ***What makes them pay attention?***

In addition to knowing where your decision makers stand on your specific issue, you need to try to understand what is important to them, and how they make decisions. That will help you decide how best to influence their decision making process. Among the important questions to ask:

- What issues do they most care about? Do they have passionate interests that you can find a way to connect to your campaign?
- Who do they listen to? Figure out whose opinions your decision makers trust. It might be that many legislators look to one of their colleagues who's an expert on an issue, or who is well-liked or respected. It may be that there are some lobbyists, donors, or other community leaders who are particularly close to a decision maker.
- How do they usually approach an issue? Are they people who generally focus on the financial implications of a proposal, or are they more likely to explain their positions in moral language? Do they tend to focus on the big picture (the welfare of the state) or on the details (the impact of a decision on a neighborhood or individual people)?
- What is their political situation or professional interest? Is an election coming up? Do they face a competitive election? Are they hoping to move into a higher position of authority? Can you make the

case that leadership or effective resolution of your issue will help them reach their own goals?

- What else makes them tick? If you happen to know what kind of hobbies or entertainment they enjoy, or where they worship, you might find other ways to connect with them.

## **Assess Your Capabilities**

Once you've identified key decision makers and ways you can influence them, consider the tools you have to work those levers of influence.

### ***Existing Relationships***

Evaluate the existing relationships that you or members of your coalition can use to influence the decision makers:

- Who among your team or coalition is particularly well-respected in the community?
- Who understands the political dynamics of their district and how they view their election or reelection needs?
- Which organizations have political influence or the ability to apply political pressure?
- Who has personal or professional relationships with the key decision makers or members of their "inner circle" of friends and advisors? Who volunteered or worked on their campaign? Who went to school with them? Served with them on the boards of community organizations?

### ***Internal Resources***

Identify resources you will need to carry out your plan. If you want to generate 250 phone calls to a key decision maker, does your organization or coalition have the ability to organize that? If you decide that a public rally or town hall will be important to staking out your position publicly, do you have the staff or volunteer time to organize it, and the financial resources to rent a space and take care of other expenses? If you believe that media outreach will play an important role in the campaign, do you have people who know how to work with media? Do you have funds, or a fundraising strategy, to pay for organizing materials or advertising?

If this is a major campaign, you may be able to hire or dedicate staff, such as a campaign manager, field organizer, or media coordinator. If you won't have the financial resources to hire staff, assess the time commitment that existing staff and volunteer leaders will be able to make for the campaign.

Create a budget that is based on your campaign plan. Every funder has different expectations about budget details, however they generally will want to see some level of detail to indicate that you have thought through the costs of your campaign, including staff time and other direct expenses. If your budget ends up being bigger than what you think you can reasonably raise, take another look at your campaign plan and figure out where you might trim first. But don't be afraid to ask for what it will take to carry out the kind of campaign your community needs. And don't forget to budget for the costs of fundraising itself, which can include printing, postage, staff time, travel, meals with potential donors, and the cost of fundraising receptions or other events.

If you determine that you are missing needed resources, you may need to review your goals and revise your strategic thinking. Do you need to broaden your team or your coalition? Is there a way to start small and expand as you gain visibility and access to additional funds?

### **Create a Written Action Plan**

You have set clear and attainable goal(s). You have identified the people who have the power to help you achieve your goal(s). You understand the official decision making process. You know what matters to the decision makers and who they pay attention to. And you have a good sense of the resources that are available to you. Now it's time to put together an action plan.

Put into writing the steps you have decided to take to reach your goal. It should include a timeline as well as intermediate deadlines for key objectives. It should assign people clear responsibilities for carrying out or overseeing each task. This can be as simple as making a chart so that everyone can see what needs to

happen next, who is responsible, and what timetable they have agreed to.

### **Choosing the right mix of tools**

Among your activist tools are ways to communicate with and organize action from a small circle of influential people (often referred to as "grasstops" organizing) and among a broader public ("grassroots organizing"), as well as engaging the news media to tell your story. Which of these tools you use and when depends on what you've decided has the best chance to influence your decision makers. Is the first objective to convince a key committee chairperson to sponsor and push your legislation? Getting to that objective is probably a behind-the-scenes "grasstops" effort to identify his or her key advisors and allies, talk with them one-on-one to get their support, and then approach the lawmaker directly. A different stage in your campaign might require a much broader-based "grassroots" strategy that mobilizes constituents to weigh in with targeted legislators and generates a media spotlight on people who have the ability to advance or stop your progress.

In addition, your team should decide in advance on a system of accountability. How often will you meet to evaluate your progress? How will you work together to make sure that people meet the tasks for which they have accepted responsibility? Making those decisions up-front can help make sure that members of your campaign team work together well and reduce the chance that you'll be distracted by internal tensions.

Don't get so focused on your own campaign that you fail to take into account the external environment. Is it an election year? Is your state in the midst of a budget crisis? Are there a particular set of issues that seem to be dominating public debate? Are there major public events taking place during your timeline that provide organizing or communications possibilities?



## **work the plan, but don't be afraid to adjust it**

*You want to have a plan and timeline that are solid enough to guide your campaign's work and evaluate your progress. But it cannot be rigid. You will need to be flexible enough to respond to unexpected obstacles and adjust to new developments.*

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**Resources:**

Spitfire Strategies offers the “Just Enough Planning Guide” to campaign planning at <http://www.justenoughplanning.org> and its “Smart Chart” guide to communications planning at <http://www.smartchart.org>.

