

GRASSROOTS CAMPAIGNS & ADVOCACY

a toolkit to help you make change happen



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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.

Dear Friend:

This toolkit was created 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 strong 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 and The 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 www.civilrights.org. You can also reach The Leadership Conference field staff at 202-466-3315 or at grassroots@civilrights.org.

Onward!



Ellen Buchman, Vice President, Field Operations
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SETTING SMART GOALS

The first step in any campaign is setting goals and identifying benchmarks toward achieving them. Having explicit goals makes it easier to map out a strategy and to explain a campaign to potential supporters. One approach to clarifying goals is to use the acronym **SMART**: goals that are **S**pecific, **M**easurable, **A**ttainable, **R**ealistic, and **T**imed.

Specific

Having a specific goal makes it easier to determine the precise steps needed to achieve it. In addition, a specific goal is more measurable.

For example, “raising awareness” of an issue or “educating the public” are not very specific. What would it take for a campaign to be successful? Even if a goal seems obvious, try making it as specific as possible. An alternative to a vague goal like “making public officials more accountable in our state,” might be something like this: “The creation of a new office of ethics and accountability that meets these four standards...”

Measurable

Clear and measurable goals can also help to raise money. Many funders want to be able to verify that funds are being put to work effectively. Having measurable goals can also help recruit, retain, and motivate volunteers; evaluate progress; and keep a campaign team on the same page.

Some goals are easier to measure than others. If a campaign is focused on changing a law or a regulation, it’s easy to know whether or not success has been achieved. If a public education campaign is being carried out on an issue, create some qualitative and quantitative measures of success. Do you want to speak to a dozen new potential coalition partners? Have a volunteer leader featured in the local paper? Give media training to 20 local leaders? Earn a certain number

of mentions in specific media outlets? Double traffic to your website?

Achievable

A goal that seems achievable with hard work can motivate activists to sacrifice time and energy to help accomplish it. A goal that seems unattainable or unbelievable may have the opposite effect; donors and volunteers are less likely to invest in what feels like an impossible quest. Are there any legal barriers to the change you want to make? Insurmountable political obstacles? Is there enough time to develop and deploy your campaign to meet your deadline?

Realistic

Evaluating whether a goal is realistic is less about the external environment and more about self-assessment. Among the kinds of questions to consider:

- What kind of financial resources will the campaign require?
- Can you identify likely sources of funding?
- Do your coalition partners have enough staff and volunteers to do what is needed?
- What are the competing demands for your time and energy? Will this campaign have a high enough priority to keep your coalition partners engaged?
- Are you likely to get support from influential community leaders?

Timed

Set deadlines. Assigning a time-frame to an ultimate goal and to the major steps in an action plan will help budget time and money, and will give you a way to hold people accountable for responsibilities they have taken. You may not always make your deadlines, but

having a timeline provides a valuable structure for the campaign. Some timelines may be set externally, like the dates of a legislative session. Others may depend more on how much groundwork is required to identify allies and build a coalition.

Getting SMART

Here's an example of a goal that is noble, but not SMART:

To ensure that schools collect and report data on high school dropout rates so that we can better evaluate disparities in educational opportunities and outcomes.

That may be a good way to describe the mission or purpose of an educational coalition, but it is not specific or measurable enough to build a campaign around. Here's one way to make that a SMART goal:

To add a provision to the pending education bill before the end of this legislative session that would require high schools and state education departments to collect and report data on dropout rates that will permit comparisons between students of different racial and ethnic backgrounds.

This is specific, measurable, and time-framed. It's possibly achievable as long as the legislature is still in session. Figuring out if it's realistic requires an honest assessment of your situation and resources.

With SMART goals in hand you are ready to think through your strategy and come up with an action plan. That plan will probably include a number of intermediate goals or objectives that will be stepping stones to your ultimate goal. Keep thinking SMART with each step you take.

Developing Strategy

Strategic planning is the bridge between setting goals and taking action. It is a process of thinking through and mapping out the steps it will take to achieve your objectives and reach your goals.

There's no single campaign template. Some campaigns may depend on generating media attention or mobilizing a specific constituency. Other campaigns may depend more on working behind-the-scenes to influence key decision makers. However, there is a set of questions to ask that will help you and a planning team prepare and implement a strategic plan.

A planning team should be a small group of people who work well together and who trust each other with frank opinions and honest disagreements.

TIP:

Obtain Data to Set Goals and Evaluate Progress

You may set a goal that requires you to collect some data. If your goal is to shift public opinion, you'll need to know where you stand at the beginning of the campaign. On many issues, polling data will be publicly available. If not, you might be able to partner with a polling unit at a university, or add a few questions to another survey.

Some government data is regularly reported and freely available. If what you're looking for requires some digging, you may need to fill out a written request under the federal Freedom of Information Act (FOIA) or your state's open records or "right to know" law. The U.S. Justice Department provides information on using the federal FOIA at www.foia.gov.

Ask the Right Questions

Developing a strategic campaign plan is a process of asking and answering a set of essential questions. During this process you may find yourself needing to revise or clarify goals and intermediate objectives.

Who are the decision makers?

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, 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 in a campaign focused on legislation, the mayor, governor or president will decide whether to sign or veto it.

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? Does an official have the authority to make a change on their own? Is there a formal process, with opportunity for public input? Is there an appeals process that you (or your opponents) may employ? What is the timetable that must be followed?
- 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?

You can take a direct approach to gathering information by calling or writing the office of a public official to ask if they have a position on your issue. Even a form letter response will tell you something.

What makes them pay attention?

Try to understand what is important to key decision makers, and how they make decisions.

- 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 they enjoy, or where they worship, you might find other ways to connect with them.

Assess Your Capacities and Capabilities

What tools do you have to work potential 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 your decision makers' constituencies?
- 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

Do your resources match your ambitions? 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 want to hold a public rally, do you have the staff or volunteer time to organize it, and the financial resources to cover expenses? If media outreach will play an important role in the campaign, do you have people who know how to work with media?

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 resources to hire staff, assess the time commitment that existing staff and volunteer leaders will be able to make for the campaign.

TIP:

Work the plan, but don't be afraid to adjust it.

Any plan and timeline should be solid enough to guide your work and evaluate your progress. But it should also be flexible enough to respond to unexpected obstacles and adjust to new developments.

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.

Resources:

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

Create a budget that is based on the campaign plan. 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

Put into writing the steps that the team has decided to take to reach your goal. It should include a timeline as well as intermediate deadlines for key objectives. Assign 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.

Don't forget to take into account the external environment. Is it an election year? Is your state in the midst of a budget crisis? Are there particular issues dominating public debate? Are there public events during your timeline that provide organizing or communications possibilities?

Choosing the right mix of tools

Which of these tools you choose to use, and when, depends on what has the best chance to influence your decision makers.

Is the first objective to convince a key committee chairperson to sponsor and push legislation? That probably requires a behind-the-scenes "grasstops" effort to identify his or her key advisors and allies, and get their support. A different stage in your campaign might require a broader-based "grassroots" strategy that mobilizes constituents to weigh in with targeted legislators and generates a media spotlight.

Your team should decide in advance on a system of accountability. How often will you meet to evaluate your