

Winning Campaign Planning Blueprint

1. Define the issue:

2. Set goals

a. For the issue

b. For BikeAthens

3. Assess Resources

a. SWOT (Strengths / Weaknesses // Opportunities / Threats)

4. Strategize

a. Decision makers

b. Secondary Targets

c. Public Audience

5. Communicate

a. General Message Slogan

b. Story

c. Media Tactics

6. Set tactics and timelines

Tactic // Date

7. Manage Resources (budget)

a. Campaign budget (outgoing)

i. Item // Cost

b. Donors and Fundraising (incoming)

ii. Item // Cost

Campaign Checklist

- 1) Write the names of your potential campaigns in the numbered boxes at the top of the column.
- 2) Score each potential campaign based on assessment criterion.
- 3) Add the total number of points for each column

How well does your campaign fulfill each criterion?

3 = High 2 = moderate

1 = low 0 = not at all

| Potential Campaigns >> | A | B | C |
|----------------------------------------------------------------------|---|---|---|
| 1. Aligns with successful models | | | |
| 2. Has reasonable prospects for victory | | | |
| 3. Results in definite, quantifiable improvement for the community | | | |
| 4. Sets long-term improvements to the walking and biking environment | | | |
| 5. Engages important groups of people | | | |
| 6. Fits mission vision and values | | | |
| 7. Involves current members in a meaningful way | | | |
| 8. Attracts new members | | | |
| 9. Inspires passion among at least a portion of your cons | | | |
| 10. Builds your organization's political power | | | |
| 11. Leverages positive media and promotion of your organization | | | |
| 12. Has strong income potential | | | |
| TOTALS: | | | |

The final total is not the last word—some criteria may be more important than others!

#1 Define Your Issue!

Now that you've selected your campaign, it's time to define it clearly. A clear definition is critical to success. Everyone in your campaign should be able to express the problem you're trying to solve and articulate the solution in exactly the same succinct and hopeful manner.

1. **Identify the problem** (Ex. Main St. is unsafe)

2. **Formulate a solution** (Main street should have bike lanes)

3. **Illustrate how to implement the solution** (Ex. State DOT should approve X policy, project, funding)

Quick Pitch: put these 3 elements together in a sentence or two that can be recited quickly:

#2 Set Your Campaign Goals

Issue Goals are the social changes you hope to achieve. For the purposes of campaign planning, your long-term goal should be achievable with this campaign. Your short and medium term goals are incremental steps toward your long term goal. It's OK for the short and medium term goals to be small. Those victories keep people energized to win the long-term goal. Be sure to include a target or completion date with each goal.

| Short-Term | Medium-Term | Long-Term |
|------------|-------------|-----------|
| | | |

Organizational Goals

Your organization should grow larger and stronger as you implement the campaign. This is easiest to measure in members and budget, but also can be measured by newly engaged leaders, stronger relationship with partners, etc...

| | Today | After Campaign |
|-------------|-------|----------------|
| Members | | |
| Budget | | |
| Other Goals | | |

#3 Asses Your Resources

SWOT Analysis: Strengths, Weakness, Opportunities Threats

| Strengths (Internal) | Weaknesses (Internal) |
|---------------------------------|------------------------------|
| | |
| Opportunities (External) | Threats (External) |
| | |

#4 Strategize

Who has the power to make the change necessary to achieve your goal?

In identifying these people, be very specific. For example, you should not list the “city council” as a target, but specific members who can give you majority support. Don’t list “Department of Transportation,” but the specific official with the power to change a policy.

This exercise will help you identify the most important target. In the case of a city council, for example, your targets are the undecided or members who can be persuaded. The unalterable opposed are not worth your time. Council members who agree with you are not primary targets, but perhaps secondary targets who can help persuade their colleague, your primary targets. (See *the Alliance’s Power Mapping exercise in the “Power Mapping Document” to plan how to reach those targets*).

| Primary Targets: specific people (list names) who have the power to make the change you seek | Secondary Targets: People who have influence on the primary targets |
|-----------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------|
| | |

Now, think about public audiences. Identify just a few public audiences, so you can tailor your message to effectively reach just the segments of the public you need to address. Think in terms of geography (e.g. neighborhoods, town, counties) and constituencies (e.g. soccer mom, low-income people). The media you choose in the next section will depend upon the public audiences you identify in the section.

List target public audiences:

- 1.
- 2.
- 3.
- +

#5 Communicate

Effective communication depends on the message, as well as the medium. These exercises will help you refine your message to make it most effective. You might find it necessary to revisit your slogan after brainstorming social media tools, writing the story, and the letter to the editor.

Brainstorm ways you might use **social media tools**, such as Twitter, Facebook, or your own website, to engage the media and encourage support for your campaign.

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Write a **compelling, personal story** about your issue. Your story should have a victim, villain and hero. It should also include a solution or opportunity for positive.

Note: the story should include our organizational values. The hero is the campaign audience we are looking to persuade. The hero's tools are the changes we are trying to make, or the action we are calling for.

Optional exercise: on a separate piece of paper, write a letter to the editor about your issue. Keep it to 200 words—150 words is ideal.

Stair speech >>>

Now that you've engaged the people in your campaign, write a Stair Speech. A stair speech is a short appeal you can relate to a politician on her way to the chambers. It should include a hook, problem, solution, and what the audience can do (call to action).

HOOK (A way to get attention and connect with your audience):

-

PROBLEM:

-

SOLUTION (Your campaign, including the name of your organization):

-

WHAT TO DO ABOUT IT (specific actions for the person):

-

SLOGAN (explaining your issue in 10 words or less):

-

Media tactics >>>

Think about ways your issue fits some of the standard qualities media use in determining newsworthy stories.

| | | |
|-----------|--------------|----------------|
| Conflict | Irony | Human Interest |
| Celebrity | Local impact | Seasonal tie |
| Injustice | Milestone | Breakthrough |

Review the various communications tactics on page 11 and above. Remember, a successful long-term media approach for this campaign will use a comprehensive communications strategy and should adhere to these points:

- Stay on message
- Develop and nurture relationships with media professionals
- Involve your members

Choose one more of these tactics and write down a strategy to implement the tactic.

| Media Tactic | Implementation Notes | Who Leads |
|---------------------|-----------------------------|------------------|
|---------------------|-----------------------------|------------------|

| | | |
|--|--|--|
| | | |
|--|--|--|

Getting Free Media

Even if we could afford direct mail approaches and paid advertisement, positive coverage of your issue in the media is far more valuable. 95% of public decision makers read the newspaper’s news section. Among all newspaper readers, 75% read the main news section, with the editorial page close behind. Less than 1/3 read advertisements. Getting coverage can be difficult, so it helps to focus your efforts with the right tactics. Having relationships with media professionals is invaluable.

- Become a reliable source
- Return report’s calls immediately
- Never exaggerate or lie
- Practice crafting good quotes and sound bites
- ID members who have personal relationships with editors or reporters
- Read your local paper, including columnists, regularly so you know there interests
- Provide information and angles that match reporters interest

The following list is a summary of the many types of media, and the pros and cons of each. Make sure you have a comprehensive communications strategy that makes use of all the most effective tactics.

| Media tactics | Pros and Cons |
|---------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Pitching stories for coverage in the news section of your local newspaper | “Selling” your stories to reports is one of the best ways to get people to notice your issue and take a side. But it’s also very difficult. You need a truly newsworthy story. “Main Street is still unsafe” is not newsworthy. “Jane Doe died because Main Street is unsafe, and Mayor John Doe agreed to make that street safer, but...” might be newsworthy. There’s a very short window to pitch a story. For instance, public reaction to a serious injury or death on street is news, but only immediately after it happens. |
| Blogs | Influential blogs can be as powerful as traditional media in getting the word out and interesting mainstream reporters. Know and build a relationship with influential bloggers in your area—and, if it’s within the capacity of your organization create a blog on your website to frame your story and get it out to the public and pique the interest of the press |
| Letters to the editor | Among the most-read sections of any newspaper. Learn how to write good letters. Critical to be timely, and /or react to a news article. There is no guarantee your letter will be printed. |
| Op-eds | These give you the opportunity to tell your story in as many as 500 words. But it is difficult to get placed, and a good OpEd piece takes time. Learn how to write a good OpEd, and stick to the word limit or you may fall victim to heavy editing. |
| Editorials | These are considered very authoritative, but you’ don’t have control over the content. The editors do. Be very prepared and professional when you meet the editorial board. |
| Columnists | Columnists are authoritative with the potential to raise the visibility of your campaign. Nurturing a positive relationship with the columnist is key. It helps to be a source for them, even if it’s not directly related to your issue. |

| | |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Radio Shows | Pick up the phone and dial (and re-dial, and re-dial). You probably have members who already listen to certain talk shows. Enlist their help in calling in. Expect backlash, and avoid shows that don't reach your target audience. |
| Press conference and press tours | Effective if you have something truly newsworthy. But if you're working in a large media market, it's difficult to attract busy reporters. Make it worthwhile by promising a striking visual that will make a good picture. Consider talking to reporters on a tour of your issue, such as a dangerous street. Getting a reporter on a bike tends to lead to a positive story. Very time consuming to produce. |
| Public Service announcements | Allow you to craft the perfect message, albeit in 30 seconds or less. Fairly easy to place, but usually played at times when only a small audience is listening. Expensive to produce in a professional manner. |
| Social Media | Using social media allows people to easily learn about your campaign. Use these networking sites not just to engage the media but also create awareness about your issue. |

#6 Tactics and Timelines

This is your to-do list. There are many kinds of tactics, and positive support can be as effective as simple pressure. In the example of the city council, get any ally to come out in support of your proposal and then flood that person with thanks. Such a tactic makes clear to the undecided city council members that your proposal is wildly popular.

Each of your tactics should meet the following criteria:

- Effectively achieves your campaign goals
- Is appropriate to your organization's culture and will strengthen, not divide, us
- Is fun—or at least not so daunting that you will alienate our base of supporters
- Is achievable
- Is realistic—you have the time, money, and people necessary to execute it.

| Tactic | Completion Date | Who Leads? |
|--------|-----------------|------------|
|--------|-----------------|------------|

| | | |
|--|--|--|
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7 Resource Management

It's important to know exactly what resources your campaign will require. It is much easier to raise money by asking for support of a specific campaign than asking for general support. Identifying actual costs of your campaign is very important, even if you don't need much money to succeed. Don't forget to include a portion of regular operating expenses (rent, telephone, etc...) that you can fairly attribute to the campaign. And, of course, always value the contributions of your staff and volunteers through continuously informing, involving, asking, and thanking!

| Type | Campaign Expense | Amount (\$) |
|-----------------------|-------------------------|--------------------|
| Personnel | - - - | |
| Professional Expenses | - - - | |
| Other | - - - - - | |

Now, list all possible income this campaign can generate:

| Campaign Income | Amount (\$) |
|------------------------|--------------------|
| New Members: | |
| Donations: | |
| Grants: | |
| Sponsorship: | |
| Events: | |

| | |
|--------|--------------|
| Other: | |
| Other: | |
| | Total |