

STRATEGY PLANNING CHART “CHEAT SHEET”



Use this strategy chart to build consensus and alignment on your vision for action within your organization, leadership team, or among stakeholders. Work together to develop detailed answers under each bucket.

| Goals | Organizational Considerations | Constituents, Allies and Opponents | Targets | Communications Objectives | 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? <i>How will the campaign:</i></p> <ul style="list-style-type: none"> Win concrete improvements 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 experiences of existing leadership Build membership base Expand into new constituencies Raise more money <p>3. List the internal problems that have to be considered if the campaign is to succeed.</p> | <p>1. Who cares about this issue enough to join or help the organization?</p> <ul style="list-style-type: none"> Whose problem is it? Into what groups are they already organized? What do they gain if they win? What risks are they taking? What power do they have over the target? <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? What power do they have over the target? | <p>1. Primary Targets</p> <p>A target is always a person. It is never an institution or an elected body. There can be more than one target but each needs a separate strategy chart as your relationships of power differ with each target.</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 (You don’t always have or need secondary targets)</p> <ul style="list-style-type: none"> Who has the power over the people with the power to give you what you want? What power do you have over them (the secondary target)? | <p>1. How can communications (external promotion) support your goals?</p> <p>2. What are the specific measurable ways to achieve your goal using communications?</p> <ul style="list-style-type: none"> Raising awareness, sharing information, increasing participation or engagement, influencing policy? | <p>1. For each target list the tactics that each constituent group can best use to put pressure on or educate the target to accomplish your intermediate or short-term goal?</p> <p>Tactics must be:</p> <ul style="list-style-type: none"> In context Directed as a specific target Backed up by a specific form of power Flexible and creative Make sense to the membership <p>Tactics include:</p> <ul style="list-style-type: none"> Media events Actions for information and demands Public hearings Letters to the editor Social media outreach Meetings with legislators Emails/newsletters Release reports Policy roundtables (open or closed to media) Release new data Polling |

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