

Campaign Planning 401: Tactics and Escalation

Learning Objectives:

Skills, Knowledge, and Attitude which learners should take away from this session.

- Learn the components of a strong tactic
- Understand how to plan escalating tactics in a campaign
- Know the difference between tactics and strategy
- Learn how to work backwards on a timeline to plan a campaign

Achievement Objectives:

Tangible steps learners will take to advance real or simulated campaign work.

- Reflect on experiences with tactics and identify what made those tactics strong
- Practice planning and ordering tactics on a timeline for SIM campaigns

Time needed: 120 minutes (2 hrs)

Normal = say out loud

Underlined = flipchart this!

Italics = trainer notes/instructions

Bold = key point

Note to Trainers:

*This session is an **EXTRA** Campaign Planning training that is **NOT** included in the Sprog Macroagenda. You can consider adding this session to your program if you want to offer Sprogers an additional, more advanced Campaign Planning training. However, you are strongly discouraged from replacing any of the 101-301 trainings with this session. The standard 101-301 CP curriculum has been very deliberately designed to teach new organizers the notoriously difficult-to-teach fundamental concepts of campaign strategy. This training will be less useful if Sprogers don't have a solid grasp of those concepts.*

Anchor: The ANCHOR step invites learners to reflect on past experiences which relate to the learning of the session. (e.g. "Think back to a time when _____. What did that feel like?")

1) Introduction [10 mins]

Welcome to the final chapter of Campaign Planning trainings! To get started, I'm going to ask you to close your eyes and think... What images come to mind when I say the words "activist" or "activism"?

Have them call out responses; many people will probably describe images associated with big marches or other very visible tactics. Point this out: I notice that most people aren't picturing planning meetings, press releases, or other behind-the-scenes work that we've talked about this week. The pictures that stick in our minds most are big, visible, powerful, creative **campaign tactics**. That's what this training is all about.

Flipchart and read Objectives.

Add: The ADD step introduces new information and tools for learners to consider.

2) What are Tactics? [10 mins]

Now that we understand why a campaign needs a Goal, Target, and Strategy, let's take a closer look at the individual steps that bring us closer to our goal: Tactics.

Tactic: A single action or activity on your campaign that gets you closer to achieving your goal

A common challenge that campaign groups encounter is planning tactics that aren't informed by a thoughtful strategy and don't move them closer to their goal.

Trainer Story: *At this point, a trainer should tell briefly about a pointless tactic you have experienced (for example, a film screening or rally that wasn't connected to any campaign and didn't lead to further action). Share details about how you felt during and after the event.*

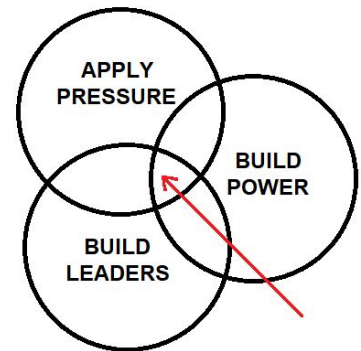
Ask if anyone else has ever had an experience like that. Take a few responses and follow up with questions: Did it feel empowering? Did you continue being a part of that group? etc.

3) Qualities of Great Tactics [25 mins]

Three Qualities [10 mins]

So, how do you plan tactics that feel empowering and get you closer to your goal? We can use three criteria to evaluate tactics. Great tactics:

- 1) Apply Pressure
- 2) Build Power
- 3) Build Leaders



The best tactics hit all three – they're in the sweet spot (*Flipchart image*).

Apply Pressure: A strong tactic puts pressure on your target to give you what you want. It fits into the logic of your strategy and demonstrates your power.

*To illustrate this point, refer back to the strategic campaign story from CP 101. Ask Sproggers to think about the target, goal, and strategy statements that they thought of for that campaign in CP 201. Suggest a tactic that would **not** have been strategic for the characters in the story: "Would it have been a good tactic for [character] to..." (e.g. a tactic that puts pressure on a person who is not the target). Press Sproggers to explain why not. Emphasize that tactics which don't advance campaign or organizational goals are a **waste of resources**.*

Build Power: Remember, our power in a grassroots campaign is Power With. A tactic builds power when it engages more people in your campaign and grows your base of supporters and active members.

Quick Brainstorm: Let's think through an example. Rallies and marches are popular, attention-grabbing tactics – but often, people who show up to a march don't actually stick around to get involved with the movement. What are some ways that a march or rally could be used to build power and grow your base?

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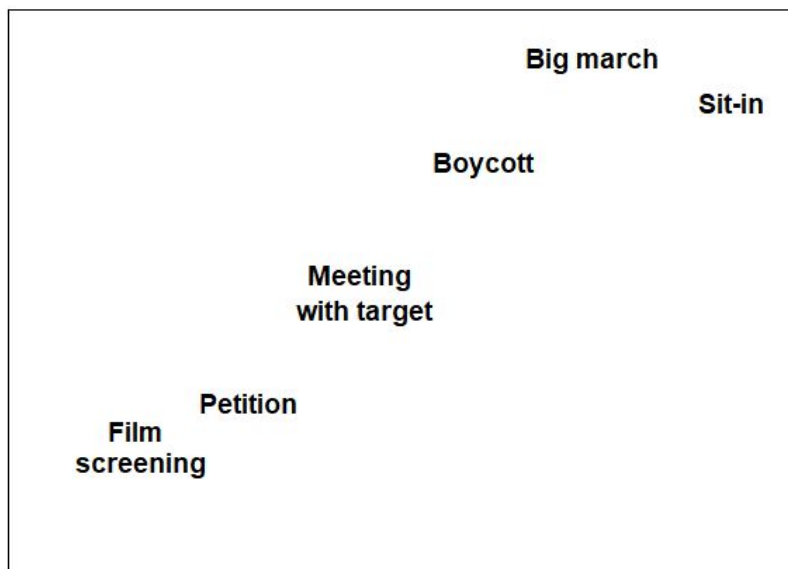
→ Remember: building power means growing the movement – i.e. getting people’s contact info or getting them to show up again for your campaign. Media attention does not necessarily grow the movement. Holding a highly-visible action that gets the word out about your issue does not, by itself, grow the movement. Be specific about pushing for ideas on how to use a march or rally as an organizing tool.

Build Leaders: A tactic builds leaders when it offers opportunities for new people to step up into leadership roles. You should keep your leadership development goals in mind throughout tactics planning. That way, you can be intentional about planning and creating roles for people who you’d like to support in taking on more responsibility.

Tactics Brainstorm [15 mins]

Now that you’ve discussed the qualities of strong tactics, ask Sprogers to think about good tactics that they’ve organized or taken part in. Give a moment for reflection before taking answers. If the group is reluctant to volunteer, start with a trainer example to get the conversation going. For each tactic shared, ask follow-up questions about one or two of the criteria (“Can you say more about how that built power in your campaign?” or, “How did that put pressure on your target?”).

As Sprogers describe tactics, record the examples on a flipchart, and **rank them from low-pressure to high-pressure and low-effort to high-effort** as in the example below. But **don’t** explain what you are doing or draw the chart yet – that comes next.



This exercise has three objectives:

- 1) Provide examples of different campaign tactics for the group. Sprogers who don’t have a big vocabulary of tactics get a chance to learn from the examples that more-experienced Sprogers share. (Remember to encourage the group to ask questions if they hear unfamiliar vocab!)
- 2) Reinforce the lesson about qualities of a good tactic by applying it to concrete examples and connecting it to Sprogers’ experiences.
- 3) Set up for the next lesson about sequencing tactics. This exercise uses experiential education principles: Sprogers’ own experiences provide the basis for this “Add” section.

(Alternate version: If your group has a lot of beginner organizers who haven’t had much experience

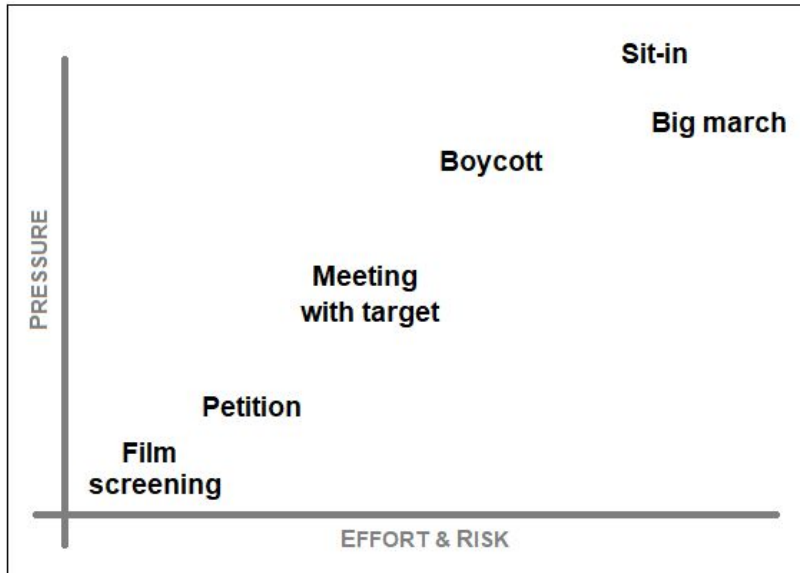
planning campaign tactics, you can use a modified version of this activity. Prepare index cards or handouts with brief descriptions of different tactics, then split Sprogers into small groups and hand out 1-2 to each group. Give groups 5 minutes to talk about how their tactic(s) could apply pressure, build power, and build leaders. Return to the big group to share back, have each group teach the room about their tactic and how it could fit the three criteria, and record and rank the examples on the flipchart.)

4) Escalating Tactics [15 mins]

When you've collected all the examples in the room, congratulate Sprogers for the great list of tactics they've generated. Then **ask them what they notice about this list**. Tease out threads to help identify some characteristics of the list. Ask probing follow-up questions as needed, e.g. "What do the tactics at the left of the page have in common?"

After a bit of discussion, announce: There's an organizing principle that describes what we're talking about: **escalation!** Understanding escalation helps us make decisions about which tactics to use when.

At this point, draw in and label the axes of a graph like this:



Tactics should demonstrate more power and pressure to your target over time. Does anyone have any ideas about why we would do this? Collect answers from group, again asking probing questions to get Sprogers to think about the question from different angles (e.g. "What leadership do you need to pull off a film screening? What about a big march?" or "Think about this from a decision-maker's point of view."). If the group doesn't come up with these responses, trainers should add:

- To give your target the opportunity to do the right thing before making their life difficult. Your target may be willing to make the change you want if you just ask, but you could burn that bridge if you start off with a very aggressive tactic.
- You can use bigger, riskier tactics to raise the stakes in your campaign if your target says NO. If your target has shown that they are not willing to do the right thing, you can build the pressure by bringing out the big tactics, like rallies or boycotts.
- Your power will build over time as your campaign progresses, so tactics that wouldn't work well at the beginning of a campaign will be possible later on. A rally with only a smattering of people

won't be very effective, so it's best to save your big ideas for later.

- *If you're practicing good leadership development, your leaders will learn and grow over time. At the beginning of a campaign, you'll want to choose lower-risk tactics to build experience and trust in your team, which will be necessary if you want to pull off riskier tactics later on.*

Optional: Tell a short story about escalation from a campaign you know or have worked on.

Imagination activity: To drive the point about escalation home, ask Sproggers to close their eyes if they feel comfortable doing so and lead them in a short visualization. Use the story below or write your own.

Imagine that you are a powerful decision-maker in city government, and a group of citizens deliver a petition to you. They are asking you to commit that in ten years, half of the city's energy will come from wind instead of coal. There are a hundred signatures. But you ignore the petition. There are a lot of reasons why you don't want to make that promise. Imagine what those reasons might be... What are your reasons? *(Have Sproggers call out responses, and/or suggest some yourself).*

Now, imagine that time passes and the group of citizens keeps growing. You start to see opinion articles in the paper about how the city's coal plant is making people sick, and how investing in wind energy would create jobs. Citizens from all over the city call into your office to express their support for clean energy. And it starts to get hard to ignore. Every time you give a public speech, people show up with banners and signs. Important people you know – business owners, union leaders, even other city officials – start voicing their support. There's a big rally outside of your office one day, and over a thousand more petition signatures are delivered. Over time, you witness a consistent drumbeat of tactics that bring the issue to your attention again and again. Think about this makes you feel. Think about the things you're concerned about now. How do you think your willingness to act on this issue might change over time?

(For dramatic effect, consider using a drum for this part, with a steady beat that speeds up as you tell the story. This may help musically-inclined learning styles.)

This is how campaigns are won. Through persistent, strategic, and escalating tactics, even targets who were eventually resistant can be convinced to make the decision you're asking for.

*Announce the break and tell Sproggers to **sit with their SIM teams** when they come back.*

*Time check: You should now be **1 hour** into the training.*

-- Break [10 mins] --

Add: The ADD step introduces new information and tools for learners to consider.

5) Timelines [10 mins]

Escalating tactics effectively takes planning and coordination. Now I'm going to show you a tool that can help a group organize its thoughts about choosing tactics: the tactics timeline!

What can a timeline help you do? [5 min]

- Keep your eyes on the prize. Having a clear plan about how you're going to reach your short-term and long-term goals can help everyone see the big picture and stay focused.
- Use material resources wisely. When you know what resources you'll need in the future, you can allocate what you have and plan ahead to get what you'll need. And when you're making good choices about what tactics to use when, you won't waste resources on tactics that don't fit with your strategy.
- Use human resources wisely. Getting organized about tactics plans can help you plan recruitment goals. A timeline can also help you be intentional about spacing out big tactics so that you build time for self-care and recharging into your team's work plan.
- Sequence tactics logically. Escalation, escalation, escalation!
- Time tactics strategically. Keep track of important events that might influence your campaign strategy – or ones that could provide good opportunities to have visible actions.
- Keep your team accountable. When you have your goals and plans in writing, you can check on your progress and hold each other accountable.
- Stay flexible. Unexpected developments, setbacks, and opportunities **will** come up, and your team will have to pivot and change your plans in response. So don't carve your timeline in stone – but do use it as a tool when you have to reassess, and edit it as you go.

Planning Backwards [5 min]

Demonstrate how to plan backwards on a timeline using the four steps below. Choose a goal that's not related to campaigns (e.g. writing a school paper or planning a party), so that everyone can relate to the example and help suggest answers for each step.

- 1) **Set a long-term goal**
- 2) **Set short-term goals**
- 3) **Work backwards from each goal to plan tactics and tasks**
*(Note: emphasize the **backwards** part on this step. Be sure to start by planning the last "tactic" that will need to happen for you to meet the goal. For example: if your first short-term goal is to invite guests to your party, the last thing that needs to happen before that is writing the invitations – and before that you'll need a guest list, and to do that you'll need to set a location, etc. That's the order in which you should write things on the timeline. This is key to the timeline tool!*
- 4) **Assign roles and delegate for the first few tactics**
Remind Sprogers that we should always be expecting the unexpected in campaign work. Plans will change, so it doesn't make sense to delegate tasks too far into the future. In your example, assign roles for the tasks leading up to your first short-term goal.

Apply: The APPLY step invites learners to utilize the new information in a task, challenge, or focused conversation. (e.g. practice, application, case studies, compare, etc.)

6) Activity: SIM Tactics & Timeline [25 mins]

Explain that SIM teams have the next 25 minutes to work on timelines for their SIM campaigns. They've already chosen long-term and short-term goals; now their task is to put those goals on a timeline and start

planning tactics. They should choose at 3-5 tactics that escalate over time and fit with their strategy.

Teams should be sure to consider the timing of other events in their SIM world when writing their timelines – for instance, if their SIM campaign takes place on a college campus, they should be sure to consider when school breaks are and take note of potentially strategic events such as reunion weekend. Trainers may want to help SIM teams out by writing up events calendars for each SIM campaign ahead of time.

Trainers should float during this activity to check for comprehension and answer questions. If any groups finish in far less than the allotted time, have them plan a few more tactics or make plans for recruitment, base-building, and fundraising based on the tactics they've planned.

(Optional: In the last 5 minutes, have SIM groups pair up and share their timelines with each other).

Away: The AWAY step invites learners to connect their new understanding to the real world context of their lives. (e.g. a personal action plan, commitment, projection into future, etc.)

7) Debrief [15 mins]

*Use questions informed by the meta method to debrief learning from **the entire Campaign Planning track**. Begin with individual journaling/reflection or pair shares for ~7 minutes, then come back to the big group for a few minutes to hear a few responses.*

- What?** → What was something new that you learned in the Campaign Planning sessions?
- So what?** → Is your perspective about how to make change different than it was before Sprog? If so, how has it changed?
- Now what?** → Take a moment to think about a group you work with back home or a campaign you hope to start. What insights from this training do you want to bring back with you?