



Alliance for Biking & Walking

Winning Campaigns Training



Campaign Planning Workbook

WELCOME!

This workbook is designed for leaders of Alliance member organizations to aid in the development of effective campaigns. The curriculum is designed to break down the barriers and challenges to safe bicycling and walking in your community.

Working through the **seven elements of an effective campaign**, this workbook helps you choose the right issue and focus on it effectively. It guides you in assessing your resources and developing goals for your campaign and organization. It teaches you how to set strategic targets, communicate effectively, choose the best tactics, stick to chosen timelines, and manage your resources.

Do not expect to always fill out the elements in order. For example, you may redefine your issue after working through an exercise that identifies opportunities and threats. Or, you may change your strategy once you have identified your targets. But, after completing the workbook with your campaign team, you will be able to walk away with your one-page **Campaign Blueprint**.

This workbook will prove an invaluable resource, but it's no substitute for personal advice. **Contact the Alliance any time** for input, advice and connection to your Alliance peers. Also, remember to access your local resources. Most communities have organizations dedicated to helping social-change organizations become more effective.

Thank you for joining us for this training and for taking the time to plan and prepare your Campaign Blueprint!

The team at the Alliance for Biking & Walking

Seven Elements of an Effective Campaign



CAMPAIGN CHECKLIST

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

How well does your campaign fulfill each criteria?

3 = High 2 = Moderate
1 = Low 0 = Not at all

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

The bottom line shouldn't dictate your final choice. Some criteria may be more important to you than others. But overwhelming support for one campaign should tell you something!

#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.

Use the following exercises to refine your definition of the issue you've chosen to address. Use a few sentences for each item.



1. **Identify the problem** (*Main Street is unsafe*):

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

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

Quick Pitch:

Now, put these three 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

Organization 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 relationships with partners, etc.



	Today	After Campaign
Members		
Budget		
Other Goals		

#3 ASSESS YOUR RESOURCES

SWOT analysis: Strengths, Weakness, Opportunities and Threats

Strengths (Internal)	Weaknesses (Internal)
<i>Strong fundraising ability</i>	<i>Poor database maintenance</i>
Opportunities (External)	Threats (External)
<i>Allocate stimulus money in our state</i>	<i>Legislature unfriendly to biking & walking</i>

#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 targets. In the case of a city council, for example, your targets are the undecided or members who can be persuaded. The unalterably 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 colleagues, your primary targets. (See the Alliance’s *Power Mapping* exercise on the next page to plan how you will reach these 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, towns, counties) and constituencies (e.g. soccer moms, low-income people). The media you choose in the next section will depend upon the public audiences you identify in this section.

List target public audiences:

- 1.
- 2.
- 3.

Power mapping >>>

Power mapping will help you to identify power relationships and show you how to influence them. It can help clarify a complex issue and identify the people with investment in that issue. Also, by mapping out who you are trying to influence (your primary target), and who influences them, you are able to identify where in the chain you have influence. Once you identify the stakeholders, you can begin to link them together by the issues they care about. By mapping out sources of support and opposition, power mapping will help you to determine exactly where and how you should focus your strategy and outreach.

Step 1: Locate your target >>> List your primary target — usually, the person with the power to make the change you seek — in the center of your map.

Step 2: Map major institutions >>> Identify key decision-making institutions, associations, or people that are related to this primary target. Write these names on the page in a ring around the target.

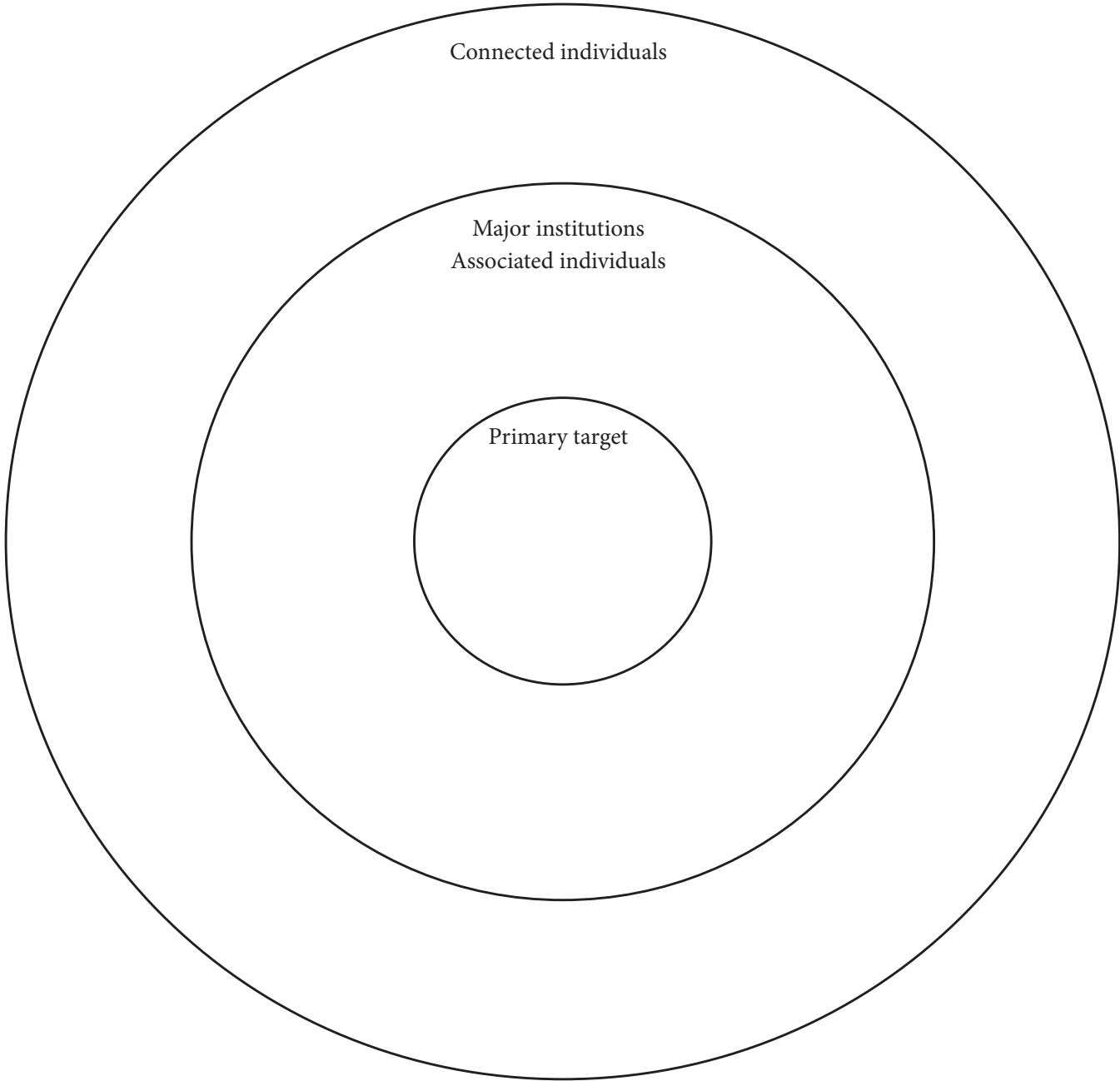
Step 3: Map individuals associated with the institutions >>> Put the names of two or three individuals who are associated with each of those institutions in the second ring (moving out concentrically) around the primary target. These can be people you know or don't know. There may be more than one person associated with each of the institutions or there may be some institutions where people don't know the names. Here you can note a question like, "Who is the department head?"

Step 4: Map all other associations >>> Now, think about the people connected to these key individuals. This helps you identify the easiest ways to reach your primary target — by tapping into existing relationships between people. This information should go in the third ring around the target.

Step 5: Determine the relational power lines >>> Step back and review the networks you've mapped out. Draw lines connecting people and institutions that have relations to each other. Some people will have many, while others may have none. The steps help the group identify what may be called the "nodes of power" within a given network.

Step 6: Target priority relationships >>> The next step is to analyze some of the relationships and make some decisions. One way to do this is to circle the few people that have the most relational power lines drawn to them. Involving these people through your group's current relationships may be deemed a priority. If no one in your group seems to be directly connected to a key target, you can take a step deeper and create another power map around each of these key people. Also, a specific person or institution in the map that doesn't necessarily have many relational lines may, nonetheless, have a few critical lines and seem to hold a lot of influence. If you can identify a priority person or institution, but don't have a clear relationship, do some homework about this person or institution.

Step 7: Develop a plan >>> Create some action steps for what to do next. These can be fairly straightforward. Determine the best approaches to accessing these individuals and institutions through relationships. Who will be responsible for what and by when? The next steps go into the "Tactics and timelines" section of your campaign blueprint.



Circle people with key relational power lines

Create action steps:

- 1.
- 2.
- 3.
- 4.

#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.

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 action.

On a separate sheet 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 he or she can do.

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 this 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 or 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 appeals and paid advertisements, positive coverage of your issue in the media is far more valuable. Ninety-five percent 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 one-third 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 reporters' calls immediately
- Never exaggerate or lie
- Practice crafting good quotes and sound bites
- Identify members who have personal relationships with editors or reporters
- Read your local paper, including the columnists, regularly, so you know their interests
- Provide information and angles that match reporters interests

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 reporters 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 a newsworthy. There's a very short window to pitch a story. For instance, public reaction to a serious injury or death on a street is news, but only immediately after it happens.
Blogs	Influential blogs can be a 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 with 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 taking 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 small audiences are listening. Expensive to produce in a professional manner.
Social media	Using social media sites, like Facebook and Twitter, allows people to easily learn about your campaign. Use these networking sites to not just 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 an 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.



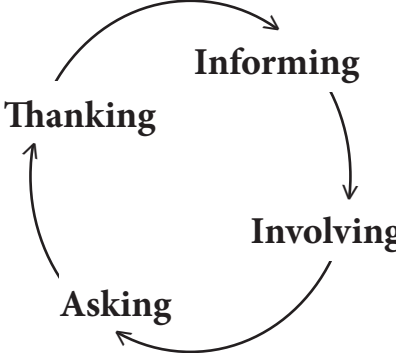
Each of your tactics should meet the following criteria:

- Effectively achieves your campaign goals
- Is appropriate to your organization's culture and will strengthen, not divide, us
- Addresses a primary or secondary target, or an identified public audience
- 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?

#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 feel 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 <i>Executive Director</i>		
Professional expenses <i>Consultants</i>		
Other		

Now, list all possible income this campaign can generate:

Campaign Income	Amount (\$)
New Members:	
Donations:	
Grants:	
Sponsorship:	
Events:	
Other:	
Other:	
Total	

Fundraising >>>

Fundraising plays a critical role in your campaign. You are giving people the opportunity to invest in biking and walking — something they care about. Nearly everyone has the ability to contribute at some level and, indeed, the majority of giving isn't by corporations or the super-wealthy. It's by people, like you, who care.

1: Now is the time >>> When you have a vision and goal for improving biking and walking, you will find others who want to help. For many, it's easier to contribute money than time. It is always easier to raise money during a campaign, so don't pass up this key opportunity to strengthen your organization and win your campaign.

2: Appreciate your role >>> You and others organizing your campaign already have shown your commitment. People give to people – identify friends, family, associates, or others you know who care about biking and walking or your work. Because you're already doing so much, you're the best person to ask for their help. Your job as the fundraiser is to ask – if you don't ask for support, most people will not give on their own.

3: Develop your “Ask” >>> See below

4: Schedule meetings >>> Reach out to donor prospects, who are likely to give a larger gift in addition to their membership. Ask to schedule a meeting to talk about ways they can increase their support for the cause. (You could also invite a board member to join you.)

5: Make the “Ask” >>> Review tips below

6: Follow-up >>> Follow through with a thank-you note.

7: Keep lines of communication open >>> Make certain to maintain a relationship. Don't let donors hear from you only in times of need.

THE ASK: Once you've had a conversation with a prospective donor(s) and heard their interests and connection to your cause, there comes a time to ask them for support. When you schedule a meeting with that prospective donor, set a goal. Determine a specific amount you are going to request and a timeframe for the support to be fulfilled. Before the meeting, practice making the “ask” out loud with a friend or co-worker. Here are some rules to follow when making the “ask.”

- 1. State your request** very simply and clearly, with a specific amount and when you need it.
- 2. Wait patiently** and quietly for an answer. Keep your attention, your eyes and your ears focused and wait. Do not say anything; just listen and wait. The prospective donor is using this time to decide if and how much to give you.
- 3. Listen** to their answer very attentively and carefully.
 - A. If they say ‘Yes’ or agree, thank them first.** Be sure you heard them correctly and repeat it back to get their acknowledgement. Thank them again. Confirm the time line and any other business and, again, thank them.
 - B. If they don't say ‘Yes,’ don't give up.** Ask if there would be a better time to discuss this. Ask them what they would be willing to do — perhaps, contribute a lesser amount. Ask what feedback or advice they have.
- 4. Ask for a referral.** Do they have friends or colleagues they think might be able to help?
- 5.** Come to a close and **thank them** for their time.
- 6.** Immediately write a hand-written **thank you note**.
- 7. Follow through** if you made any commitments or promised any follow-up.

Appendix 1 >>>

Facilitating Effective Meetings

Volunteers need respect and professionalism even more than paid campaign workers, because they aren't paid to be there. Well-facilitated meetings that respect your volunteers' time and energy will keep everyone engaged and enthusiastic. Here are some tips for effective meetings.

1. Time and place

- Choose a productive setting — for instance, don't choose a venue that's too large
- Be mindful of length — keep it as short as practically possible and remember, after 90 minutes, people need a break
- Begin and end on time
- Prepare and test materials and hand-outs before the meeting starts

2. Build a strong agenda

- Introductions
- Role assignment (or announcement)
- Agenda review (include times on each item)
- General announcements
- Next steps and date to meet
- Evaluation

3. Ensure good facilitation

- Be clear about your role and opinion
- Guide group toward reaching decisions and next steps
- Use brainstorming to get ideas on the table and prioritize those with greatest impact
- Gently prod involvement, stifle dominance
- Assign responsibilities
- Identify metrics so you can identify that you have accomplished your goals

Glossary and toolbox

Announcement: A presentation that doesn't require response. Should always end with "Contact __, if you want more information."

Brainstorm: All ideas are written down, with no criticism of any idea. This method explores possibilities, encourages creativity.

Go-around: Each person gets one chance to speak on the issue for a short time. It's very helpful to distinguish between the questions, "What's best for you, personally?" and "What do you think the group should do?" (Both can be done, but in separate rounds, so the second is informed by knowledge of others' desires.)

Bike rack: Like a "parking lot" (without the car-culture references), this is a technique to set aside ideas to discuss at a future time.

Fishbowl: People most involved with, or with the strongest opinions about something, are designated as the only ones to speak for a specified period. This is used to clarify and negotiate controversies. After the fishbowl, the larger audience responds.

Straw poll: This method gets a sense for what the members of the group want without spending time to hear from each. This can help a group get to a decision quickly.

Consensus: This is a state of group agreement to proceed on a matter in a certain manner. Contrary to popular belief, consensus does not require all group members to have faith in the method chosen. It does require that all feel their concerns were heard, considered, and, to the extent possible, incorporated in the group decision on what to do, or how vigorously to do it.

Appendix 2 >>>

Additional Media Resources

The media landscape is constantly shifting. While traditional outlets still play a major role in public discourse, the impact of online platforms and non-traditional reporters continues to grow. Check out these and other resources in the Alliance Online Resource Library (<http://tinyurl.com/7yggkox>) for tips on how to best communicate your message and advance your campaigns.

Presentations

Working with the Media (Alliance) — <http://tinyurl.com/7k4vpt4>

Press Releases Made Easy (Alliance, Shipley Communications) — <http://tinyurl.com/89rpvnt>

Technology for Our Movement (Bay Area Bicycle Coalition) — <http://tinyurl.com/72a7jkn>

Alliance Mutual Aid Calls

Friends in News Places: Working with the Media (2010) — <http://tinyurl.com/85yocu8>

Media Relations (2007) — <http://tinyurl.com/76a3bsn>

Social Media and Web 2.0 Technology (2011) — <http://tinyurl.com/836rojy>

Other Resources

Working with the Media (Transportation Alternatives) — <http://tinyurl.com/7btd63j>

Working with the Media (Colorado Nonprofit Network) — <http://tinyurl.com/7ydy727>

Sample Media Fact Sheet (San Francisco Bicycle Coalition) — <http://tinyurl.com/6ujmkpu>

Developing Relationships with Reporters (Spin Project) — <http://tinyurl.com/6obzfew>

How to Get An Op-Ed (Bicycle Transportation Alliance) — <http://tinyurl.com/76q4724>

Writing for Communications (Spin Project) — <http://tinyurl.com/7zyvz2b>

Sample Press Releases (Alliance member organizations) — <http://tinyurl.com/6svd87r>

Leveraging Social Media (Adventure Cycling Association) — <http://tinyurl.com/747ueqw>

Social Media Metrics (SAS) — <http://tinyurl.com/7pvb239>

Social Media-focused websites

- Nonprofit Technology Network: <http://www.nten.org/>
- L2 Think Tank: <http://l2thinktank.com/>

NOTES >>>

This Winning Campaigns Training is supported by:



For more information, resources & inspiration, visit www.PeoplePoweredMovement.org

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