

## Module 1: Strategy



### Goals

Participants should be able to:

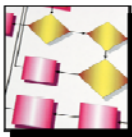
- See that organizing is logical and systematic.
- Think strategically, not tactically.
- Understand that strategy is about power relationships.
- Use the Midwest Academy Strategy Chart to plan PTA activities and incorporate ways to build PTA into each activity.



### Time

Total: One Hour

- Presentation: 30 minutes
- Exercise: 20 minutes
- Debrief: 10 minutes



### Overview

This is the main part of the training, all other pieces flow from it. Starting with a blank strategy chart on a black/white board or wall, the trainer goes through the five columns: Goals, Organizational Considerations, Constituencies, Decision-makers and Tactics) showing how each plays a vital role in developing a workable, winning issue campaign strategy that builds the organization. The objective is to get the participants to think strategically whenever they think about working on an issue. The natural tendency is to think tactically (i.e. what event or demonstration can we conduct to dramatize our situation?). The job of the trainer is to get the participants to hold all thoughts of tactics until the end of the process.

Space needs to be identified for small groups of up to eight people each. *There is only time for one trainer to debrief three charts.* If you have more than 24 people then it is best to create six groups of four people each. After the groups work on their charts for 20 minutes

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each, the trainer then debriefs three groups in separate rooms. If the main training room is very large several small groups can meet in it. Others will need breakout rooms or space where six to eight people can meet, hear each other, and fill out the chart

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## Materials Needed

- Easel paper (five sheets per small group)
  - Masking tape
  - Dark markers
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## Handouts

- Make copies of the handouts as detailed in the Program Preparation section in the front of this manual.
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## Equipment Needed

- Easel/"flipchart" (recommended minimum of two, five is preferable)
  - *If you have elected to develop your own PowerPoint presentation to suit your specific training audience for this module, you will need:*
    - Computer with PowerPoint software
    - LCD Projector
    - All cords and cable needed to connect computer with LCD projector, and extension cord to connect computer and LCD projector with electrical outlet
  - AV stand or tab (if you will be using PowerPoint in this module)
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## Introduction



### Welcome to Module 1: Strategy

By the end of this module, you should be able to:

- See that organizing is logical and systematic.
- Think strategically, not tactically.
- Understand that strategy is about power relationships.
- Use the "Strategy Chart" to plan PTA activities and incorporate ways to build PTA into each activity.



### Instructor Note

Strategy charts should never be displayed on an easel. Always show all five columns at once. This is also true when you debrief the group's charts. A chart can't be debriefed a page at a time, you must always be able to see the whole chart and how the columns relate.



- The strategy chart is one of the most useful tools that we have found for consistently doing good planning. The value of the chart is that it poses the right questions in the right order. Learn how to use it for planning individually, but also for leading group discussions. It prevents people from going off on too many tangents, and it provides an outline for the discussion.
- At first glance, the chart appears to be a series of lists. Actually, it works like a spreadsheet. All five columns need to be wired together, so that if anything changes in one column, you must make appropriate changes in the others. As in a spreadsheet, there are certain mathematical relationships in the chart. Your demands have to be equal to your power, and your tactics must have a direct cost to your target. I'll explain all of this in a moment, but first:



### Ask

Who remembers the difference between a strategy and a tactic?

[Answer: The *strategy* is the overall plan. A *tactic* is something you do to carry out the plan. It is a step in carrying out the plan.]

## Introduction



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Put up the whole Strategy Chart, either flipchart or PowerPoint version.



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The chart consists of five columns which correspond to the five basic elements of strategy.

1. **Goals:** The victory you want to win.
2. **Organizational Considerations:** What you have to put into the fight, and what you want to get out of it organizationally.
3. **Constituents:** The answer to the question, who else cares about this problem enough to join us in doing something about it?
4. **Decision-Makers:** Those who can give you what you want.
5. **Tactics:** The things that you and your constituents do to the decision-makers to make the target give you what you want.

Let's go over these, one column at a time.



### Instructor Note

Remind the group of the difference between a problem and an issue that was mentioned in the Introduction.

- The problem is what is wrong.
- The issue is the solution for which you are working.

## 1. Goals



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The Goals column can be divided into three categories: Long-term, Intermediate, and Short-term Goals. This is done to encourage you to think of organizing as a process that goes on over a period of time, rather than a one-shot episode for a limited objective. It helps to break larger issues down into smaller winnable components, which in turn, gives you a chance to build the organization.

1. **Long-term Goals:** These may extend beyond the particular campaign on which you are presently working. For example, a local PTA may have a long-term goal of improving the health and lowering the obesity rates of children in their school.
  2. **Intermediate Goals:** The intermediate goals are the issues you want to win in this campaign. For the local PTA in the example above, it might be to require that physical education programs be restored to all schools in the district.
  3. **Short-term Goals:** Short-term goals are steps towards your intermediate goals. The local PTA might request that the school board hold a community hearing on the physical condition of school children in the district. The hearing will give you a local activity around which to build the campaign, and create a forum in which to present the adverse effects of cutting the Physical Education program and demonstrating your power. If you are in a large city you might request several hearings to organize people in different neighborhoods.
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## 1. Goals

- To survive, particularly in a long campaign, a group must move from victory to victory. Always build in some small but quick victories, if for no other reason than it builds morale.
- Once you have done a chart for the overall campaign, go back and do others for each of the short-term and intermediate goals. An actual working strategy chart only applies to one level of goals, the goal on which the group is about to take action, but it is necessary to see where this fits into the larger campaign.
- Remember that we use the word “goals” a bit differently than in everyday language. In the chart, a goal can only be something that you intend to win from someone. If you want to build your membership, that isn't considered a goal here, it goes in the next column, Organizational Considerations. If you want to educate people about an issue, that also isn't a goal in the strategy chart, it is tactic, and goes in the last column. Goals are always what you want to win in an issue campaign.



### Instructor Note

Occasionally, someone questions this definition of the word “goal,” or says that according to the dictionary there is really no difference between goals and objectives. Do not get into an argument about this, or any other use of language definition. Simply say that they are right, but that we are using the words a little differently. In this case, we want to make a distinction between issue goals and organizational goals.

## 2. Organizational Considerations



We are going to look at the three elements of organizational considerations:

- Resources
- Organizational gains
- Internal problems



### Instructor Note

Separate the column for organizational considerations into three parts.

- First – list the resources that the organization has to invest in the campaign.
- Second – list the gains the organization hopes to realize from the campaign. Stress the importance of asking "How will this campaign build the organization?"
- Third – list internal problems.



### First, Resources

What is the organization going to invest in this campaign? How much volunteer time? How much money and leadership time? What additional resources does it bring: members, reputation, physical facilities, press contacts, allied groups, or research ability? This is the place to put the campaign budget. Every campaign ought to have its own budget. This is also where staff time allocations are made if there is any staff and volunteer allocations. Don't count people or resources twice. If someone is doing another task within PTA, put down a realistic fraction of their time for this campaign.

## 2. Organizational Considerations

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### **Next, Organizational Gains**

What do you want the organization to look like after the campaign? How many new PTA members? How many new members can be added to particular committees? Put in the number. How many people will take on greater leadership responsibility? Name them if you can. How much money can be raised during the campaign? What new allies do you want to make? Don't say, "more" or "better." Give specific names and numbers! These organizational gains are often confused with issue goals, and people put them in the first column by mistake.

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### **Finally, Internal Problems**

List any problems internal to your organization that are going to get in the way of the success of the campaign. By internal problems we mean things like budget problems, racial and ethnic tension, personality clashes among leaders, too few volunteers, etc.

Develop plans for eliminating or dealing with them.

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## 3. Constituents, Allies, And Opponents



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Now we are going to look closer at the subject of constituents, allies, and opponents.

### Constituents

The Constituency column is where you list all the people and organizations that can be activated in some way to support you. The level of activity may vary from signing a petition to actually attending an event. This column is the answer to the question, "Who cares about this issue?" List everyone who cares, why they care and how many of them there are. Is there some reason why the target would be worried by their participation in your campaign?

The point here is to list the way people are organized or grouped. It isn't helpful to say that "everyone" cares, or "all the transit riders care," because you usually can't reach everybody one by one. You can best reach people who are organized, live in certain places, belong to certain churches, community groups or unions, read certain publications in which you can advertise or get a story, or are on certain mailing lists, etc. If you need to mobilize a lot of people quickly, or build a multi-organization campaign, then think of how people are already organized. If your unit wants to develop its own membership, then think about how the issue affects people as individuals, and where to find the most strongly affected people.

When listing people and groups that might be interested in, or affected by, the issues be as expansive as possible, even farfetched. Then, separate out those you really want to be a part of the organization or campaign, those you want as allies, those you want to neutralize, and those you want to keep away. Think outside the box. Often, stronger communities (e.g., stronger communities may have a very active PTA unit, strong community organization, active NAACP branch, strong education coalition, etc.) already have school board members, city council members or legislators who support our positions. The problem is that there are not enough of them and we need to get additional support from other communities.

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## 3. Constituents, Allies, And Opponents

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### Allies

Allies are people who support us, but who, for whatever reason, are not potential members of our organization. For example, the Latino Action Network might work very closely with us on some issues but must maintain its own organizational identity for a variety of reasons. We'll talk more about this when we discuss building coalitions. Individual policy makers can also move from target to ally and vice-versa.

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### Opponents

List the groups or individuals who will actively oppose you. You may not be able to do anything about them, but it is useful to anticipate who will be on the other side. Do not get sidetracked into fighting with your opponents. They do not have the power to make the decision. Our job is to show the target that we have more power than the opposition.

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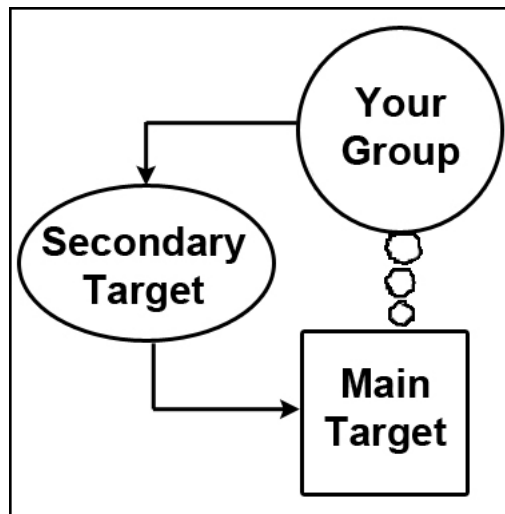
## 4. Targets (Decision-Makers)



There are two types of targets: primary decision-makers and secondary targets.



**Draw On Chart**



First, let's consider the primary decision-maker

- The primary decision-maker is the person who can give us what we want and is not necessarily a bad person. A person becomes the target of the campaign just by virtue of having the power to make (or not make) the decision we want. If there is no clear target, we are unlikely to have a successful campaign. The decision-maker is always a *“who.”* It is *always a person or persons who have the power to give us what we want.* A target is not a department such as the Board of Education. However, the specific, individual board members can be targets. It is not the legislature, or a building (city hall). It is one or more individuals who are in a position to say *“Yes”* or *“No”* to our demands. Individuals are the weak link in any institution. As an institution, our legislators may have a mutually agreed upon policy. But, as individuals, each one has a different set of fears, likes, dislikes, ambitions, rivalries, business interests or political connections. We can win over individuals by appealing to their personal self-interest.

## 4. Targets (Decision-Makers)

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- Our ability to get a decision-maker to give us what we want is a function of our power over him or her, not a function of how polite or impolite we might be, how smart we are, or how much research we did, although all that helps. In dealing with decision-makers, we have to demonstrate our power.
- When the primary decision-maker is the head of a corporation, power is usually measured in the dollars that might be lost by the company, or in our ability to bring regulatory agencies into the situation. When the primary decision-maker is an elected official, power is measured in votes. Do we hold the balance of power? Will our members really vote on the basis of this issue? Is there someone else to vote for? An elected official usually knows if our constituents have never voted for him and never will, in which case we have very little power, and we need to find ways to cut the issue so as to get support from a broader range of people.
- Determining the basis of our power over a primary decision-maker is critical to our overall strategy. A misjudgment here can negate the best of all other plans.

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Next, there is the secondary target or indirect power person.

- Remember, we just finished discussing primary targets/decision-makers: The people who can give you what you want.
  - Secondary targets: People over whom you have more power than you have over your primary target/decision-maker. They in turn have more power over the primary decision-maker than you do. For example, in the Physical Education campaign that I mentioned earlier, let's say that the superintendent of schools is an appointed official. The local PTA has no direct power over this individual. However, let's say that the school board is appointed and the superintendent is appointed by the mayor (who is elected). Citizens vote for the mayor, and the mayor is responsible for the actions of those he or she appoints. You target the mayor as the primary decision-maker. If you are unable to get a meeting with the mayor, you might look for a secondary target who can pressure the mayor to meet with you. For example, a major contributor to the mayor's campaign over whom we have some power such as a local storeowner, or
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## 4. Targets (Decision-Makers)

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a ward leader who turns out a big vote for the mayor and has many active PTA members in the ward. There is not always a secondary target. If your target is an elected official and large numbers of your constituents register to vote, and if your campaign is a popular one, then you will have direct power over the politician. When listing decision-makers clearly label them primary and secondary targets and indicate who is useful in putting pressure on whom.

- To repeat, because primary decision-maker are often elected officials, it is important that you understand the political context in which you will be operating. The PTA is non-partisan and does not endorse candidates, but we still need to know the electoral process, the electoral numbers and the dates of the primary and general elections. When was the primary decision-maker's last election? Is the school board election at the same time as other local elections or is it a stand-alone election? Are members elected by district or at large? How long has she or he been in office? How many people voted in the last election? How many votes did the Target get?
  - By finding out these numbers we will be able to determine how many people we need to organize to effectively influence the primary decision-maker.
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## 5. Tactics



### Instructor Note

Dramatically point to the appropriate columns of the Strategy Chart as you say the words below:



- Tactics are what the people in the Constituents column do to the people in the Targets (Decision-Maker) column to apply pressure to them and make them give us the things in the Goals column in such a way that it builds the organization as in the Organizational Considerations column. For every tactic, there must be someone to do it, someone to whom it is done, and some reason why the person to whom it is done doesn't want it done and will make a concession to us to get us to stop doing it.
- This is the fun part. Develop clever tactics that demonstrate and build power and make sense to your members. Be as creative as possible while remembering to go through the other four steps in the strategy first.
- The main point in tactics is that any tactic has to have an element of real power behind it. It is not just something to show how you feel about an issue. Tactics are chosen in relationship to how much power the organization has. We often say that a good tactic is like standing on the decision-maker's foot until s/he pays you to go away. Hearings, rallies, petitions, meetings with the target and leafleting are all tactics, and all require the organization to have some measure of power. For example, bringing off a successful community meeting at which a state legislator is held accountable requires a more powerful group to organize it. We are simply making it clear that we cannot support people whose actions are opposed to ours and our children's best interests. There was a suburban group that was unhappy with a position taken by the area's state representative. They invited him to a gathering and served coffee, cake and cookies. It was very proper, but everyone in the room had either worked in, or given money to, his campaign. There could not have been a stronger show of power. When they expressed their displeasure with his stand on the legislative issue with which they were concerned, he clearly understood the power they had. It did not need to be said.

## 5. Tactics

- Tactics such as holding signs outside an elected official's office have symbolic value and can be a good media kickoff for a campaign, but they are not a substitute for a strong voting bloc. Another element in choosing tactics is that they are *outside the experience of the target* and *within the experience of the people we are organizing*. Our members need to be comfortable with the tactics.
- If your PTA unit conducts voter registration drives make sure that you include voter registration as one of your tactics and incorporate it into as many activities as possible. For instance, at community forums, candidate forums, accountability sessions, or any large action, encourage everyone to register to vote and have registrars present. Do this in a very visible way to indicate that you are building the power of your unit. Please note, however, that although you can inform an official that you are doing non-partisan voter registration drives, you may not in any way discuss how we do it, get suggestions from the official as to how you should do it, or otherwise coordinate the activity with any elected official or his/her representative.



### Instructor Note

After going through the chart once, pointing out the appropriate questions, go through it again quickly using a campaign from your own experience as a model.

**THIS IS ESSENTIAL FOR THE GROUP TO REALLY UNDERSTAND HOW TO USE THE CHART!**

Make sure that your example is on the right scale for the group. Don't tell a group with a very local issue, the details of how you won the fight for some large national issue. Indicate actual goals, organizational considerations, constituency, who the decision-makers were, why they were chosen and tactics that were used. If you have clippings from the campaign, make a packet and pass it around for all to see.

After presenting your chart, add a timeline. Talk here about how a campaign needs to fit into the organization's calendar. Holidays, seasons (weather), the school calendar, elections, all have to be factored in.

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## Strategy Exercise



### Instructor Note

On the pages that follow are directions for a Strategy Exercise.

As stated in the *Getting Started>About This Manual>Three Types Of Campaign Exercises* section of this manual (page viii), there are three case studies available. Each illustrates advocacy at the local, state, or federal level. You should have selected the level you believe to be the most appropriate and relevant to your group, and copied the handouts for that level's case study to use in the following exercise.

Reminder, the design of this course is for the level addressed to remain consistent throughout. That is, if you work the local level case study in this module, you should work the local level case studies in all the other modules.

## Strategy Exercise — Local

**Local**

### The Campaign To Restore Bus Service To St. Finbar Magnet Schools



Participants practice creating a strategy chart for an issue advocacy campaign using a hypothetical scenario involving a local school district.



Total: 30 minutes

- Exercise: 20 minutes
- Debrief: 10 minutes

## Strategy Instructions

**Local**



Depending on the number of people present, break into three groups of five to eight people each.

Distribute the Strategy Exercise Handout and review the instructions with the group. Each group gets the same assignment.

Distribute five sheets of easel paper and markers to each group to use for writing its own strategy chart and timeline.

For each group appoint (or tell them to choose) a leader and a reporter. The reporter should be the person who writes the chart as it is easier for the person who wrote the chart to read his/her own handwriting. Add that if there are points on which they can't agree, they should vote and move on.

Tell each group where it is to meet, and announce the specific time that all groups should be back, e.g. "It is now 10:00 a.m. We will reconvene at 10:20 a.m."

Often the group will tell you that they don't have enough information. Tell them to pretend they have done the research and make up what they need. But tell them to keep it within the realm of the probable.

If you have a large group and two trainers, divide into six small groups. Each trainer will debrief three groups, so tell all the groups to which room they should return. After the groups start working,

## Strategy Instructions

Local

make the rounds a few times to be sure that they are on track. Often groups get stuck on goals. Remind them that goals are things that you win from someone. If need be, make suggestions to move the group along.

Give the groups a five-minute warning before the end of the 20 minutes, and then call them back to report when 20 minutes are up. **No matter how much time you give for this exercise people want more.**

## Strategy Debrief

Local



Call the class back to order.

Have each group's reporter tape their group's charts on the classroom walls. Look at them and decide on your overall debriefing plan. For example, you might start with the best chart and then add in good ideas from the others. You might group charts by which target was chosen or which tactic was most relied upon.

Have each group present its campaign strategy chart and timeline. If you are pressed for time, after the first presentation ask each group to indicate only what it did that was different from the previous reports. At the end of the time, the trainer should evaluate the charts, and examine the strong and weak points.

It is important to note that there may be many different plans for winning any campaign. The most important thing is that there is a plan. Ask each group if they think they can win with their strategy. Most will feel good about their plans. Show groups with weak plans how to strengthen them.

In the text of the strategy script we use the local example, the St. Finbar PTA. As the trainer, you should help people sort out how to develop a winning strategy. Don't be overly critical. Your job is to make sure that participants understand what constitutes a good strategy and that there is a plan to carry it out. The biggest mistakes people make are:

- Not being specific about the goal (no clear "ask").

## Strategy Debrief

Local

- Wrong Target – they often list staff as the decision-maker instead of the elected official.
- Tactics do not convey the power of the group – too few people doing too little.

### Look for the following in each group's strategy chart.

Often no one group will include all the elements however, if you look across all of the charts one or two main ideas will be in any one chart. Point this out at the end of the debriefing and indicate that if this were real life you would appoint a committee to take all the charts and come up with a final chart that incorporates the best ideas from each one.

#### *Goals*

Organizational considerations often wind up here and need sorting out. Short-term goals are frequently misplaced tactics. **Make sure that the goals are specifically about THE ISSUE – what the group wants to win.**

#### *Organizational Considerations*

Organizational considerations are often less specific than they should be. Make the point that if you are around for the long haul (a campaign is an opportunity to build your organization and raise money as well as spend it. So, there should be a specific fundraising goal for the campaign in addition to PTA's general fundraising plan. Be sure that there are actual numbers of new members and leaders to be developed, and some thought given to new allies. If the group does not think they can win this alone, ask if they have considered forming or joining a coalition. If there will be a coalition, who will provide the resources come to staff it? If the work is to be done by volunteers, who are the specific people who will lead the campaign or coalition effort?

#### *Constituency*

The tendency is to list types of people who aren't organized and can't easily be reached, for example, "all voters" or "all parents." On the budget cut issue, groups that might be allies on other issues may not want to work with you on this. They may think that their constituency will be affected adversely if PTA can only stop the

## Strategy Debrief

Local

education cuts. For example the seniors may think that their services will be cut to pay for the education programs.

Look at the groups that the participants have listed and make sure that the strategy takes their organizational self-interest into account.

Highlight groups that may have supported the decision-maker.

### *Targets (Decision-Makers)*

Make sure that the groups have listed the officeholder as the decision-maker. The decision-maker's staff members are neither primary nor secondary targets. They may be fine and helpful people, but they do not make the final decision. The decision-maker does.

If the groups list any secondary targets, make sure that they really have power to make the decision-maker give you something that you want.

### *Tactics*

The charts are frequently weak on face-to-face meetings with the decision-maker. Often there is a reliance on post cards, petitions, etc. They are useful but not enough. Point out tactics that:

- Show the largest number of supporters for the issue that can be put on record. These are usually simple, such as signing petitions, sending emails or making phone calls.
- Bring the largest number of people together in any one place. This not only has a powerful effect on the decision-maker but builds the morale of your group as well. Lobby days, rallies, marches, and town hall meetings are examples.
- Make a direct face-to-face ask of the decision-maker. The decision-maker must be put on spot personally. These kinds of asks can take place at a small meeting after a large show of strength or at one of the big meetings mentioned above.
- Point out those who listed opportunities to use voter registration and GOTV. Ask how many people they plan to register and turn out. It should have some relationship to the margin of victory in the last election. If one group has a plan to register 500 new voters, ask why they chose that number and

## Strategy Debrief

**Local**

how they expect to carry out the plan. Who from the constituency column will actually do the voter registration (or any other tactic)?

Participants are often not specific about who will do which tactic. Legal tactics (filing law suits) are fine, but note that they are generally not membership builders, because there is little role for lay people.

## Strategy Exercise — State

**State**

### The Campaign To Invest In New Leif's Children



Participants practice creating a strategy chart for an issue advocacy campaign using a hypothetical scenario involving an issue before the state legislature.



Total: 30 minutes

- Exercise: 20 minutes
- Debrief: 10 minutes

## Strategy Instructions

**State**



Depending on the number of people present, break into three groups of five to eight people each.

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Distribute five sheets of easel paper and markers to each group to use for writing its own strategy chart and timeline.

For each group appoint (or tell them to choose) a leader and a reporter. The reporter should be the person who writes the chart as it is easier for the person who wrote the chart to read his/her own handwriting. Add that if there are points on which they can't agree, they should vote and move on.

Tell each group where it is to meet, and announce the specific time that all groups should be back, e.g. "It is now 10:00 a.m. We will reconvene at 10:20 a.m."

Often the group will tell you that they don't have enough information. Tell them to pretend they have done the research and make up what they need. But tell them to keep it within the realm of the probable.

If you have a large group and two trainers, divide into six small groups. Each trainer will debrief three groups, so tell all the groups to which room they should return. After the groups start working, make the rounds a few times to be sure that they are on track. Often groups get stuck on goals. Remind them that goals are things

## Strategy Instructions

State

that you win from someone. If need be, make suggestions to move the group along.

Give the groups a five-minute warning before the end of the 20 minutes, and then call them back to report when 20 minutes are up. **No matter how much time you give for this exercise people want more.**

## Strategy Debrief

State



Call the class back to order.

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Have each group present its campaign strategy chart and timeline. If you are pressed for time after the first presentation, ask each group to indicate only what it did that was different from the previous reports. At the end of the time, the trainer should evaluate the charts, pointing out strong and weak points.

It is important to note that there may be many different plans for winning any campaign. The most important thing is that there is a plan. Ask each group if they think they can win with their strategy. Most will feel good about their plans. Show groups with weak plans how to strengthen them.

In the text of the strategy script we use the local example, the St. Finbar PTA. As the trainer, you should help people sort out how to develop a winning strategy. Don't be overly critical. Your job is to make sure that participants understand what constitutes a good strategy and that there is a plan to carry it out. The biggest mistakes people make are:

- Not being specific about the goal (no clear "ask").
- Wrong Target – they often list staff as the decision-maker instead of the elected official.



**Strategy Debrief**

**State**

- Tactics do not convey the power of the group — too few people doing too little.

The general debriefing notes are in the handout. In addition following are a few more specific points for each example.

**State Legislative Issue Campaign — State Sen. Olivia Rosten**

**Analysis of the District**

Before the small groups present their charts, ask if anyone did an analysis of the district. You want to see how the participants used the voting and demographic information they received.

Senate District 5 includes all parts of State Legislative Districts 13, 14, and 15. State Sen. Rosten, a Republican, is a 20-year incumbent. She won her last election by an almost 3,500 vote margin of victory. The Fremont School District is in State Legislative District 13. The demographic numbers indicate that District 13 is the most diverse of the three State Legislative districts with the largest non-white group being African-American. The cuts will fall disproportionately on lower-income students. While all people of color are not low-income, a disproportionate number are and these cuts will affect them and their children.

**Look for the following in each group's strategy chart**

Often no one group will include all the elements. However, if you look across all of the charts one or two main ideas will be in any one chart. Point this out at the end of the debriefing and indicate that if this were real life you would appoint a committee to take all the charts and come up with a final chart that incorporates the best ideas from each one.

*Goals*

Organizational considerations often wind up here and need sorting out. Short-term goals are frequently misplaced tactics. **Make sure that the goals are specifically about THE ISSUE — what the group wants to win.**

In this case some possibilities that might be presented:

## Strategy Debrief

## State

### Example One

- **Long-term:** Stop the Budget Cuts
- **Intermediate:** Get Sen. Rosten to commit to vote against the budget cuts.

### Example Two

- **Long-term:** Insure adequate funding for all public schools in the state, or access to a high quality education for all children in the state.
- **Intermediate:** Get the Legislature to vote against proposed budget cuts.
- **Short-term:** Get Sen. Rosten to commit to vote against the budget cuts.

Other items should be moved to the Organizational Considerations column or the Tactics column. If it is a real demand for something else, then it should be put aside for another campaign.

NOTE: Of the two examples above, one has a longer term vision for school funding and access to quality education. The other is specifically about the current lack of funding. Both can lead to fine strategies. However, if one or more groups put down the more visionary long-term goal, point this out and emphasize the need to build a strong PTA to not only win on this round but in the long term.

### *Organizational Considerations*

Organizational considerations are often less specific than they should be. Make the point that if you are around for the long haul, a campaign is an opportunity to build your organization and raise money as well as spend it. So, there should be a specific fundraising goal for the campaign in addition to the PTA's general fundraising plan. Be sure that there are actual numbers of new members and leaders to be developed, and some thought given to new allies. If the group does not think they can win this alone, have they considered forming or joining a coalition? If there will be a coalition, who will provide the resources to staff it? If the work is to be done by volunteers, who are the specific people who will lead the campaign or coalition effort?

## Strategy Debrief

## State

### *Constituents*

The tendency is to list types of people who aren't organized and can't easily be reached, for example, "all voters" or "all parents." On the budget cut issue, groups that might be allies on other issues may not want to work with you on this. They may think that their constituency will be affected adversely if the PTA can only stop the education cuts. For example the seniors may think that their services will be cut to pay for the education programs.

Look at the groups that the participants have listed and make sure the strategy takes their organizational self-interest into account.

Highlight groups that may have supported Sen. Rosten.

### *Targets (Decision-Makers)*

Make sure the groups have listed Sen. Rosten as the decision-maker. Her staff members are neither primary nor secondary targets. They may be fine and helpful people, but they do not make the final decision. Sen. Rosten does.

If the groups list any secondary targets, make sure that they really have power to make Sen. Rosten give you something that you want.

### *Tactics*

The charts are frequently weak on face-to-face meetings with Sen. Rosten. Often there is a reliance on post cards, petitions, etc. They are useful but not enough. Point out tactics that:

- Show the largest number of supporters for the issue that can be put on record. These are usually simple, such as signing petitions, sending emails or making phone calls.
- Bring the largest number of people together in any one place. This not only has a powerful effect on the decision-maker but builds the morale of your group as well. Lobby days, rallies, marches, and town hall meetings are examples.
- Make a direct face-to-face ask of the decision-maker. The decision-maker must be put on spot personally. These kinds of asks can take place at a small meeting after a large show of strength or at one of the big meetings mentioned above.

## Strategy Debrief

## State

- Point out those who listed opportunities to use voter registration and GOTV. Ask how many people they plan to register and turn out. It should have some relationship to the margin of victory in the last election. If one group has a plan to register 5,000 new voters in Senate District 5 and another 500 new voters, ask why they chose those numbers and how they expect to carry out the plan. Who from the Constituency column will actually do the voter registration (or any other tactic)?

Participants are often not specific about who will do which tactic. Legal tactics (filing law suits) are fine, but note that they are generally not membership builders, because there is little role for lay people.

## Strategy Exercise — Federal

**Federal**

### The Campaign To Improve Foods Sold Outside School Meal Programs



Participants practice creating a strategy chart for an issue advocacy campaign using a hypothetical scenario involving an issue before the U.S. Congress.



Total: 30 minutes

- Exercise: 20 minutes
- Debrief: 10 minutes

## Strategy Instructions

**Federal**



Depending on the number of people present, break into three groups of five to eight people each.

Distribute the Strategy Exercise Handout and review the instructions with the group. Each group gets the same assignment.

Distribute five sheets of easel paper and markers to each group to use for writing its own strategy chart and timeline.

For each group appoint (or tell them to choose) a leader and a reporter. The reporter should be the person who writes the chart as it is easier for the person who wrote the chart to read his/her own handwriting. Add that if there are points on which they can't agree, they should vote and move on.

Tell each group where it is to meet, and announce the specific time that all groups should be back, e.g. "it is now 10:00 a.m. ... We will reconvene at 10:20 a.m."

Often the group will tell you that they don't have enough information. Tell them to pretend they have done the research and make up what they need. But tell them to keep it within the realm of the probable.

If you have a large group and two trainers, divide into six small groups. Each trainer will debrief three groups, so tell all the groups to which room they should return. After the groups start working,

## Strategy Instructions

**Federal**

make the rounds a few times to be sure that they are on track. Often groups get stuck on goals. Remind them that goals are things that you win from someone. If need be, make suggestions to move the group along.

Give the groups a five-minute warning before the end of the 20 minutes, and then call them back to report when 20 minutes are up. **No matter how much time you give for this exercise people want more.**

## Strategy Debrief

**Federal**



Call the class back to order.

Have each group's reporter tape their group's charts on the classroom walls. Look at them and decide on your overall debriefing plan. For example, you might start with the best chart and then add in good ideas from the others. You might group charts by which target was chosen or which tactic was most relied upon.

Have each group present its campaign strategy chart and timeline. If you are pressed for time after the first presentation, ask each group to indicate only what it did that was different from the previous reports. At the end of the time, the trainer should evaluate the charts, pointing out strong and weak points.

It is important to note that there may be many different plans for winning any campaign. The most important thing is that there is a plan. Ask each group if they think they can win with their strategy. Most will feel good about their plans. Show groups with weak plans how to strengthen them.

In the text of the strategy script we use the local example, the St. Finbar PTA. As the trainer, you should help people sort out how to develop a winning strategy. Don't be overly critical. Your job is to make sure that participants understand what constitutes a good strategy and that there is a plan to carry it out. The biggest mistakes people make are:

- Not being specific about the goal (no clear "ask").

## Strategy Debrief

## Federal

- Wrong Target — they often list staff as the decision-maker instead of the elected official.
- Tactics do not convey the power of the group — too few people doing too little.

The general debriefing notes are in the handout. In addition following are a few more specific points for each example.

### **Federal Issue Campaign — Rep. Ethan Charles (Congressional District 2)**

#### **Analysis of the District**

Before the small groups present their charts, ask if anyone did an analysis of the district. You want to see how the participants used the voting and demographic information they received. In analyzing the background information it appears that Congressional District 2 is a Republican district. It has elected a Republican congressman for the four elections preceding the last election. In the last election Ethan Charles, a Democrat, was chosen to represent the district in Congress.

Congressional District 2 was considered a safe Republican seat. However, if you look at the electoral numbers they indicate that more Democrats are registered to vote than Republicans, and there are a sizeable number of Independent voters. For years, a number of Democrats and Independents have been voting for a Republican congressman.

In looking at the former congressman's (Gilpeak) voting record it shows he is split. His rating is 56 percent liberal and 44percent conservative on social issues and about the reverse on economic issues. He managed to carve out a middle position in which he got the bulk of the Republican vote and a sizeable amount of the Democratic vote. Add to that a chunk of the Independent and Libertarians, and he was able to carve out a winning electoral strategy. This is, in reality, a pretty moderate district.

When the conservative Republican won the 2008 primary, Democrats switched back to their own party and enough Independents and Republicans voted with them to elect Ethan Charles their representative.

## Strategy Debrief

## Federal

### Look for the following in each group's strategy chart

Often no one chart will include all the elements of a strategy. However, if you look across all of them one or two main ideas will probably be in each chart. Point this out at the end of the debriefing and indicate that if this were real life you would appoint a committee to take all the charts and come up with a final chart that incorporates the best ideas from each one.

#### *Goals*

Organizational considerations often wind up here and need sorting out. Short term goals are frequently misplaced tactics. **Make sure that the goals are specifically about THE ISSUE** – what the group wants to win.

In this case below are two possibilities that might be presented:

#### Example One

- **Long-term:** Pass the Child Nutrition Reauthorization Act
- **Intermediate:** Get Rep. Charles to vote for the Child Nutrition Reauthorization Act
- **Short-term:** Get Rep. Charles to vote for the amendment to the Act that includes a minimum federal protective nutrition standard for foods sold outside of school meals.

#### Example Two

- **Long-term:** Insure that all children have access to adequate, nutritious food and reduce levels of obesity.
- **Intermediate:** Get Congress to pass the Child Nutrition Reauthorization Act
- **Short-term:** Get Rep. Charles to commit to vote for the amendment and the Act

Other items should be moved to Organizational Considerations or Tactics, and if it is a real demand for something else then it should be put aside for another campaign.

NOTE: Of the two examples above, one has a longer term vision concerning children's health and nutrition. The other is specifically about the current Childhood Nutrition Act. Both can lead to fine



## Strategy Debrief

## Federal

strategies. However, if one or more groups list a more visionary long-term goal, point this out and emphasize the need to build a strong PTA to not only win on this round but in the long term.

### *Organizational Considerations*

Organizational considerations are often less specific than they should be. Make the point that if you are around for the long haul, a campaign is an opportunity to build your organizations, raise money as well as spend it, so there should be a specific fundraising goal for the campaign in addition to any general fundraising plan. Be sure the charts contain actual numbers of new members and leaders to be developed, and some thought given to new allies. If the group does not think it can win this alone, have they considered forming or joining a coalition? If there will be a coalition, who will provide the resources to staff it? If the work is to be done by volunteers, who are the specific people who will lead the campaign or coalition effort?

### *Constituents*

The tendency is to list types of people who aren't organized and can't easily be reached, for example, "all voters" or "all parents."

Look at the groups that the participants have listed and make sure that the strategy takes their organizational self-interest into account.

Highlight groups that may have supported Rep. Charles. If they list non-traditional allies (groups that don't normally work together) comment on it. This is good!

### *Targets (Decision-Makers)*

Make sure that the groups have listed Rep. Charles as the decision-maker. His staff members are neither primary nor secondary targets. They may be fine and helpful people, but they do not make the final decision. The congressman does.

If the groups list any secondary targets, make sure that they really have power to make Rep. Charles give you something that you want. AND, you have the power to make the secondary target pressure the congressman.

## Strategy Debrief

## Federal

### *Tactics*

The charts are frequently weak on face-to-face meetings with Rep. Charles. Often there is a reliance on post cards, petitions, etc. They are useful but not enough. Point out tactics that:

- Show the largest number of supporters for the issue that can be put on record. These are usually simple, such as signing petitions, sending emails or making phone calls.
- Bring the largest number of people together in any one place. This not only has a powerful effect on the decision-maker but builds the morale of your group as well. Lobby days, rallies, marches, and town hall meetings are examples.
- Make a direct face-to-face ask of the decision-maker. The decision-maker must be put on the spot personally. These kinds of asks can take place at a small meeting after a large show of strength or at one of the big meetings mentioned above.

Point out those who listed opportunities to use voter registration and GOTV. Ask how many people they plan to register and turn out. It should have some relationship to the margin of victory in the last election. If one group has a plan to register 5,000 new voters in Senate District 5 and another 500 new voters ask why they chose those numbers, and how they expect to carry out the plan. Who from the Constituency column will actually do the voter registration (or any other tactic)?

Participants are often not specific about who will do which tactic. Legal tactics (filing law suits) are fine, but note that they are generally not membership builders, because there is little role for lay people.



### Transition To Module 2: Coalitions