Why + how we plan (evidence-based) campaigns
Goals for this section

- Build a shared understanding of why campaign planning is important
- Identify the key building blocks of effective campaign plans
- Walk through examples of how organizations are using evidence to decisions
- Take time to reflect and integrate ideas into your campaign plan
A campaign is a series of planned actions that take the resources you currently have (or can gain access to) and turn them into the power you need to get the change you want.
Campaign planning:

1. Allows us to be **pro-active** -- not just reactive
2. Helps us **define the boundaries** of our work
3. Helps us **allocate resources** efficiently
4. Helps us **build organizational and political power**
Campaign planning is a process that:

- Is **iterative** and **nimble**, with key stakeholders
- Results in a **written** campaign plan that guides all work
- Provides clear **goals**, **timelines**, **benchmarks**, and **metrics** of success
- Builds and develops **leaders** in our campaigns
- Helps **raise the resources** necessary to do the work
Building blocks of a campaign plan

- **Vision**
- **Values**
- **Lay of the land**
- **Goals**

- **Theory of change**
- **Strategy**
- **Target selection + power-mapping**
- **Community power analysis**

- **Integrating equity**
- **Communications**
- **Tactics to build power + scale**
- **Experimentation + evaluation**

Why *evidence*-based campaign planning?

- Our work is too important and too urgent for our strategies and tactics to fail or backfire

- We are not always great at guessing 😊

- Evidence–based campaign planning helps us build off the best available knowledge of what works well (and not so well)
Evidence and tools to support campaign planning

- Public opinion research
- Social science research
- Data and analytics
- Experimentation
- Campaign case studies
**Vision:** *What is the world you are working to bring into being?*

- A shared sense of where we’re head in the long-terms helps us set the appropriate trajectory for our work

- Campaigns with clear visions are more likely to be successful than those without them

- Without alignment on vision, it’s easier to get distracted and/or pulled off course

Green New Deal for Durham; Sierra Club Movement Manual, 2016; Moxley, 2003
“We are Kentuckian. We have a vision…”

We have a vision …

We are working for a day when Kentuckians – and all people – enjoy a better quality of life.

When the lives of people and communities matter before profits.

When our communities have good jobs that support our families without doing damage to the water, air, and land.

When companies and the wealthy pay their share of taxes and can’t buy elections.

When all people have health care, shelter, food, education, and other basic needs.

When children are listened to and valued.

When discrimination is wiped out of our laws, habits, and hearts.

And when the voices of ordinary people are heard and respected in our democracy.
“We are Kentuckian. We have a vision…”
Values: What are the beliefs and ideals that will guide the work?

• Making campaign values explicit can help increase commitment and alignment and reduce conflict in coalitions

• Can be descriptive words/phrases or more formal principles and protocols
Lay of the land

• Are there clear patterns in how the issue has evolved over time? How might those trends affect your campaign?

• What is the current status of the issue? Hypothesis for how it will evolve?

• What kind of opposition have you faced or are you likely to face? What are their priorities and concerns?

• Who else is working on this issue?

What evidence exists to help you better understand the campaign context?

RE-AMP Art of Campaign Planning; Carbon Brief, 2020
As we drive our positive economic vision for New Mexico, we must also draw a clear contrast with the opposition and their vision. The strength conservatives have on fiscal issues thanks to long-term stereotypes needs to be challenged.

They put political ideology ahead of New Mexico’s economy. They’d rather protect the big oil and gas interests that fund their campaigns than allow the clean energy industry to thrive here, and they’ve sold out our schools for corporate tax cuts and giveaways.

They serve the well-connected, not the hardworking people trying to better themselves: the big banks, not the families trying to afford college; the corporations lobbying for loopholes, not the small-business owners trying to compete.
S.M.A.R.T.I.E. campaign goals and outcomes

• **Strategic**: Reflective of your organizational vision
• **Measurable**: You will know whether the goal has been met
• **Ambitious**: Challenging enough that winning = significant progress
• **Realistic**: Possible to accomplish, given existing context, resources
• **Time-bound**: Clear deadline
• **Inclusive**: Brings those most impacted—into processes, activities, and decision/policy-making in a way that shares power
• **Equitable**: Seeks to address systemic injustice, inequity, or oppression
Realizing the goal of a decarbonized Kansas

“Through an executive order, Governor Kelley announces a **Climate Action Plan** for the state by the **end of 2020** with an ambitious carbon reduction goal (**100% carbon-free by 2080**) that considers the **disproportionate impacts** of both climate change and dirty energy on low income and communities of color.”
Evidence-checking your goal

54%* of Kansans think renewable energy is most important

Some in Kansas have proposed requiring renewable energy like solar power. How much does renewables matter to you? Of the following issues, which do you feel is the most important?

- Health of people and communities
- Water pollution, drought, and flooding
- Transportation, roads, transit, and traffic
- Land use, urban planning, and agriculture
- Energy and electric utilities
- Air pollution

*7.9% of respondents selected air pollution.

In this Wednesday, Feb. 19, 2020 photo, Ratches Veld-Reaber, executive director of the Kansas Interfaith Alliance, testifies against the bill to ban cities and counties from banning single-use plastic bags and straws, at the Statehouse in Topeka, Kan. Reaber says he’s frustrated that lawmakers are considering such a measure and not having a meaningful conversation about climate change. (John Hanna/Associated Press)
Theory of change: Why we will win

• Description of why a certain program and set of activities will result in us achieving our campaign goal

• Helps campaign clarify:
  o Root causes of the problem you are working to solve
  o What exactly needs to change to achieve your goal
  o Some ideas for how to change it

“I think you should be more explicit here in step two.”
**PEOPLE POWER:** An active base of public support.

*We build our people power by talking to people. We also grow our people power through escalated moral protest.*

**POLITICAL POWER:** A critical mass of enthusiastically supportive public officials.

*We vote out corrupt officials and vote in real leaders who will stand with us.*

**THE PEOPLE’S ALIGNMENT:** Movements and groups united by the shared vision of a government that fights for dignity and justice for all.
Sunrise Movement: How to WIN the Green New Deal

**OUR STRATEGY**

**STAGE 1, 2017:** Launch the movement.

**STAGE 2, 2018:** Make climate change matter in the midterm election.

**STAGE 3, 2019:** Make the entire country feel the urgency of the crisis.

**STAGE 4, 2020:** Win governing power by bringing it home through the 2020 general election.

**STAGE 5, 2021:** Engage in mass noncooperation to interrupt business as usual and win a Green New Deal.
**Target selection and power-mapping**

- What is the decision-making venue or process you will work to influence?

- What is the timeframe of the decision?

- What decision-maker(s) have the power to deliver or deny a victory?
Amazon Employees for Climate Justice target Bezos

The world’s richest man unveiled a fund to help climate scientists and activists, an escalation of his philanthropic efforts.
Community mapping and power analysis

- What will it take to win—and sustain the win?

- Where and with which constituencies does your coalition already have relationships?

- Where do you need to invest resources and build relationships?

Sierra Club, 2016
# Mapping power in IL via an *epic* spreadsheet

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<th>Full Name</th>
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<th>Enviro Voting Record Score</th>
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<td>100%</td>
<td>Leadership, members of caucus</td>
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<th>Q1 Clean Energy Supporter</th>
<th>Q2 Responds to Constituents</th>
<th>Q3 Responds to Lobbying</th>
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<td>5</td>
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<td>3</td>
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<td>Leader of the Senate. Tends to trend moderate despite high levels of local support</td>
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Integrating values of equity and justice

1. Who makes the decisions?
Those closest to the problems will inevitably know the most about what the solutions need to look like.

2. Who benefits?
The climate crisis is ecological, but has its roots in systemic inequity that is both racial and economic.

3. What else will this impact?
Sometimes environmental “solutions” can create new problems for other issues that we care about.
1. We seek a sustainable future for the earth and its people. We believe that all people have a right to live and make a living on a living planet.

2. We recognize climate change represents a serious threat to all and especially to vulnerable people such as workers, people of color, seniors, youth, and the poor. Governments at all levels need to act now because the warming planet puts prosperity out of reach for far too many.

3. We understand that unchecked corporate power jeopardizes a sustainable future. We support democratic and public control of the energy and finance sectors so that private interests never compromise the health and well-being of workers and our communities.

4. We can address both the climate crisis and the inequality crisis with the same set of policies. As the impacts of climate change mount, the crises of inequality and democracy will continue to grow.
Communicating for climate action

Media story

Environmental groups want a North Carolina Atlantic Coast Pipeline permit canceled

BY LYNN ROBSON
AUGUST 13, 2019 04:27 PM

Opponents of the Atlantic Coast Pipeline have created a mini-documentary, "Robeson Rises" about their opposition to the 600-mile interstate natural gas line. BY GREEN HERO FILMS

RALEIGH

Two environmental groups are asking the state to revoke a water quality permit for the Atlantic Coast Pipeline, an insecure underground natural gas project, because of new information about its impacts.

In their petition, NC Climate Solutions and Friends of the Earth say the pipeline will have major impacts, particularly on Robeson County, that were not disclosed in the pipeline application.

The state Department of Environmental Quality approved plans for the pipeline in January 2016. The 600-mile pipeline would run from West Virginia and into Virginia and North Carolina. Its path takes it through eight North Carolina counties, ending in Robeson County.

Key talking points

The Atlantic Coast Pipeline: Risky and Costly . . . and Unnecessary

BY JAMES STEINBAUER | AUG 27 2019

Fallen trees after crews cleared the route for the Atlantic Coast Pipeline in March 2018, in Waynesboro, Virginia. | Photo by Jay Westcott/The News & Advance

Dominion Energy is determined to complete the controversial Atlantic Coast Pipeline, which if built would carry more than a billion cubic feet of fracked gas 600 miles from the mountains of Appalachia to North Carolina and the Virginia coast daily. But so far, Dominion and its partners are...

Organizing narrative

News and Observer, 2019; Sierra Magazine, 2019; Energy News Network, 2019
Potential Energy: “Save Florida Man”

- SAVE FLORIDA.
- SAVE FLORIDA MAN.

1.3 MILLION HOMES IN FLORIDA ARE AT RISK OF FLOODING

TALL BOY PROTEST
Write my name on a tall boy and place it outside the capitol building in Tallahassee.
Tactics to build power and scale

• How will the tactic help you reach your goal? How will it help you build long-term power?

• Does your organization have the capacity to effectively carry out the tactic?

• How will the tactic help you build alliances? Neutralize opponents?

CARE, 2001; RE-AMP, 2016
Films screenings to build support for solar in SC

"Our field organizing program was able to increase the number of legislative contacts by 30% from what we have seen in prior years. It's a shot of adrenaline that just allows us to take what we do to the next level."

John Tynan
Executive Director of CVSC

Exposure Labs, Conservation Voters of SC, 2019
Experimentation

• What are the **big questions** related to your campaign where if you knew the answer today, you would make a **different campaign decision** tomorrow?

• If evidence does not currently exist... **test it!**
Reaching new Latinx climate activists in Colorado

“When comparing email, text messaging, and social media advertising as digital platforms to engage communities of color, text messaging will generate the highest number of actions at the lowest cost.”

- Lilly Zoller, Conservation CO

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Conservation Colorado and Protégete, 2019
Evaluation

- What are the **quantitative** and **qualitative** ways to measure your organization’s impact?

- How do you hold your campaign **accountable to stakeholders and communities** you represent?

- What worked well? What would you do differently next time? Where, with whom will you **share insights and lessons learned**?
Lessons learned from NAACP’s EJ field organizing

- Focus on shifting the narrative from the outset.

- Prioritize engagement of the most impacted people.

- Invest in base-building and leadership development.

- Pursue targeted and consistent outreach to educate the community.
To sum it up:

• **Measure twice, cut once.** It’s not a “plan” unless it’s written down. Take opportunities to “consider the evidence” at each step of the planning process.

• **Integrate values around equity and justice from the very beginning.** It might take longer but the win will be more likely to solve problems for the most impacted communities and will result in powerful, lasting relationships.

• **Ask or test it yourself!** If evidence to inform your work does not already exist, consider how you might allocate resources to generate some insights to confirm your assumptions – before you move forward with the campaign.

• **Take time to reflect + evaluate.** Our work is too important and too urgent to not know whether we’re on the right path.
Bonuses: a worksheet for you!

Developing an evidence-based campaign plan

Building Blocks of an Evidence-Based Campaign Plan

- **Vision**: What is the world you are working to bring into being?
- **Values**: What are the beliefs and ideals that will guide the work?
- **Lay of the Land**: What evidence exists to help you better understand the internal and external context of the campaign?
- **Goals and Outcomes**: What is the objective of the campaign? What are the interim milestones necessary to achieve that goal?
- **Theory of Change**: Why will the campaign achieve its goal, given current context?
- **Strategy**: How will the campaign win?
- **Target selection and power mapping**: Who has the power to deliver or deny a victory? What is the decision-making venue or process you will work to influence?
- **Community power analysis**: Where and with which constituencies does your coalition already have relationships? Where does it need to invest resources and build stronger relationships?
- **Integrating equity**: Who makes decisions about the campaign? Who benefits if the campaign is successful? Who else will the campaign impact? How can the campaign proactively work with constituencies that are traditionally underrepresented and disproportionately impacted?
- **Communications and Messaging**: Who do you need to move and activate in order to achieve your goal?
- **Tactics to build power and scale**: How will the campaign identify and recruit to take action – and sustain that action-taking? How will the campaign develop and leadership among activists?
- **Experimentation**: What are the big questions related to your campaign where, if you knew the answer today, you would make a different campaign decision tomorrow?
- **Evaluation**: Did our organizing and advocacy work have the intended effect? What worked well? What didn’t work well?