

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



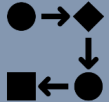
Lay of the land



Goals



Theory of change



Strategy



Target selection + power-mapping



Community power analysis



Integrating equity



Communications



Tactics to build power + scale

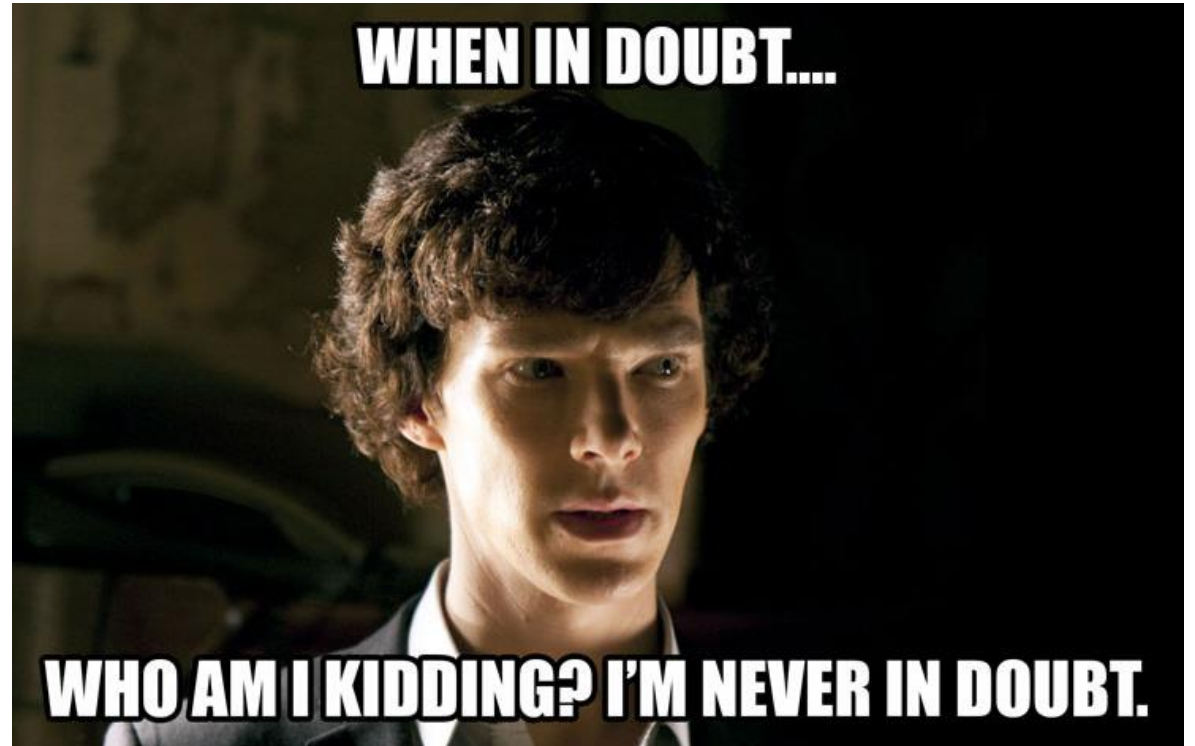


Experimentation + evaluation



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



“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...”





The Empower Kentucky Plan creates

46,300

MORE JOBS
over 15 years, while lowering home energy bills and cutting pollution.

Learn more at empowerkentucky.org



The Empower Kentucky Plan will

LOWER HOME ELECTRICITY BILLS BY 10%

while creating jobs and cutting pollution.

Learn more at empowerkentucky.org



The Empower Kentucky Plan will invest

\$387

MILLION
in a just transition for affected workers and communities.

Learn more at empowerkentucky.org



The Empower Kentucky Plan will

CUT CO₂ POLLUTION BY 40%

Learn more at empowerkentucky.org



The Empower Kentucky Plan will invest

\$11 BILLION

TO MAKE HOMES AND BUSINESSES MORE EFFICIENT
and prioritizes energy savings in low-income communities.

Learn more at empowerkentucky.org



The Empower Kentucky Plan will

IMPROVE HEALTH BY LOWERING HARMFUL POLLUTION

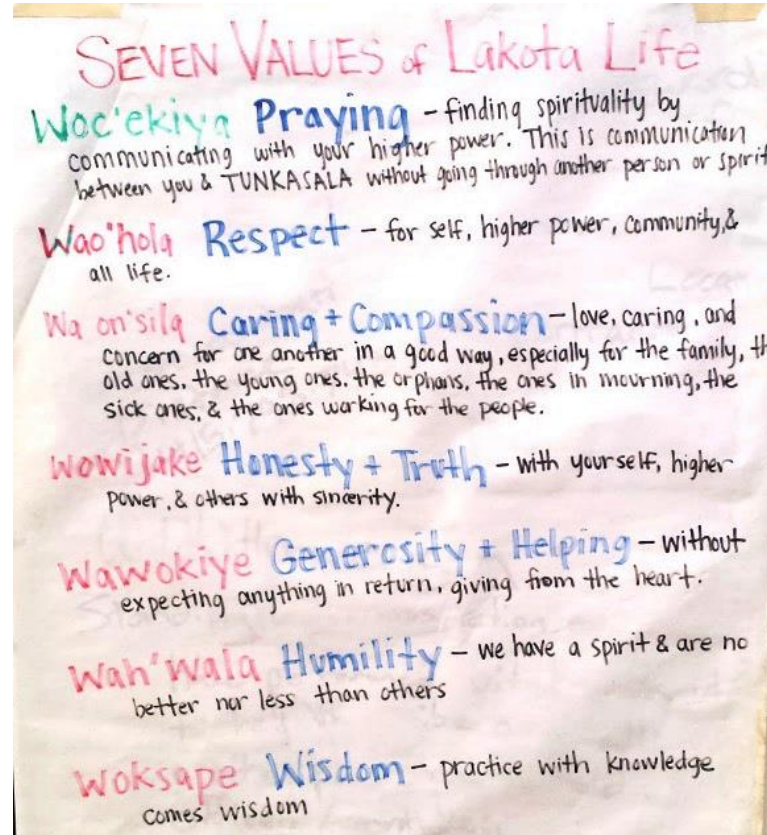
while creating jobs and lowering bills

Learn more at empowerkentucky.org



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

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

- 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?





Mapping the New Mexico mindset



“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 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

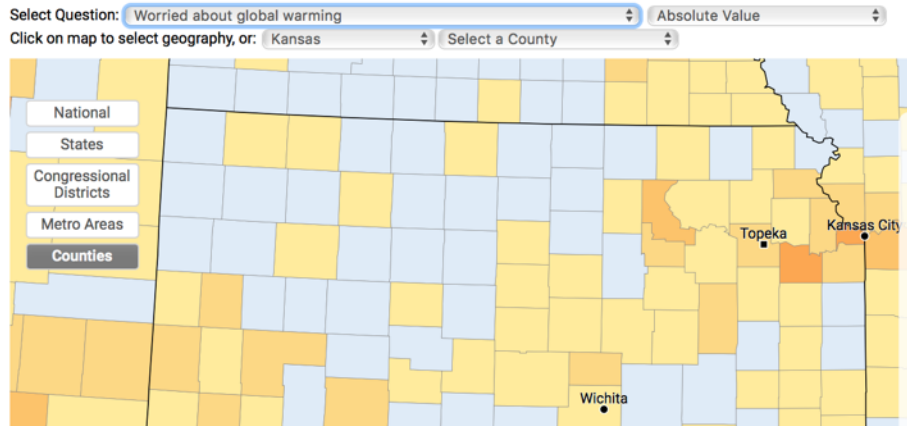
“Through an executive order, Governor Kelley announces a **Climate Action Plan** for the state by the **end of 2020** with an ambitious carbon reduction goal (**100% carbon-free by 2080**) that considers the **disproportionate impacts** of both climate change and dirty energy on low income and communities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



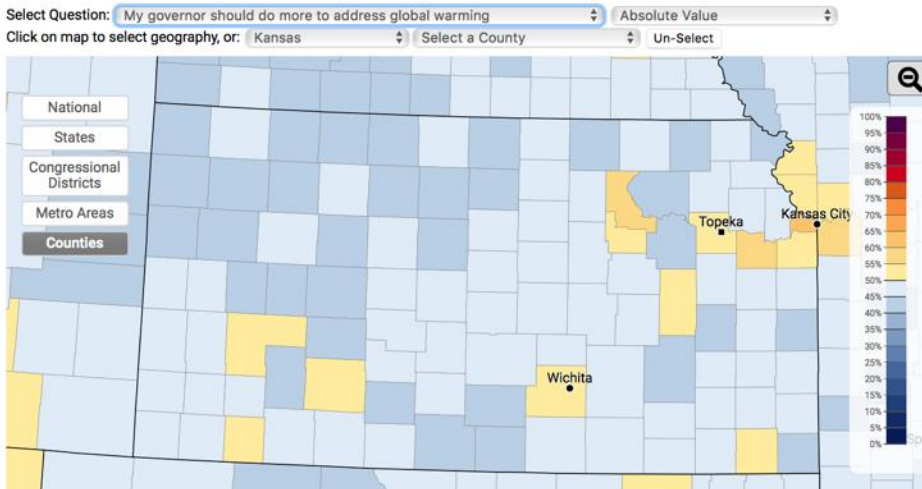


Evidence-checking your goal

Estimated % of adults who are worried about global warming, 2018



Estimated % of adults who think my governor should do more to address global warming, 2018



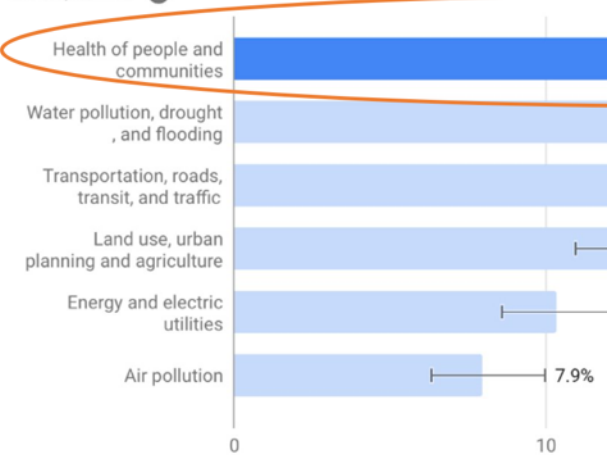
54%* of Kansans support renewable energy

Some in Kansas have proposed requiring renewable energy like solar power. How

“Health” is most important WEALTH

Of the following issues, which do you feel is the most important?

808 respondents



Results are weighted



Climate and Environment

As climate changes, activists struggle for Kansas' attention

+ Add to list



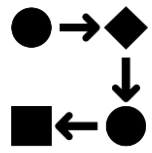
In this Wednesday, Feb. 19, 2020 photo, Rabbi Moti Rieber, executive director of the Kansas Interfaith Alliance, testifies against a bill to bar cities and counties from banning single-use plastic bags and straws, at the Statehouse in Topeka, Kan. Rieber says he's frustrated that lawmakers are considering such a measure and not having a meaningful conversation about climate change. (John Hanna/Associated Press)

By John Hanna | AP

Feb. 20, 2020 at 3:00 p.m. EST

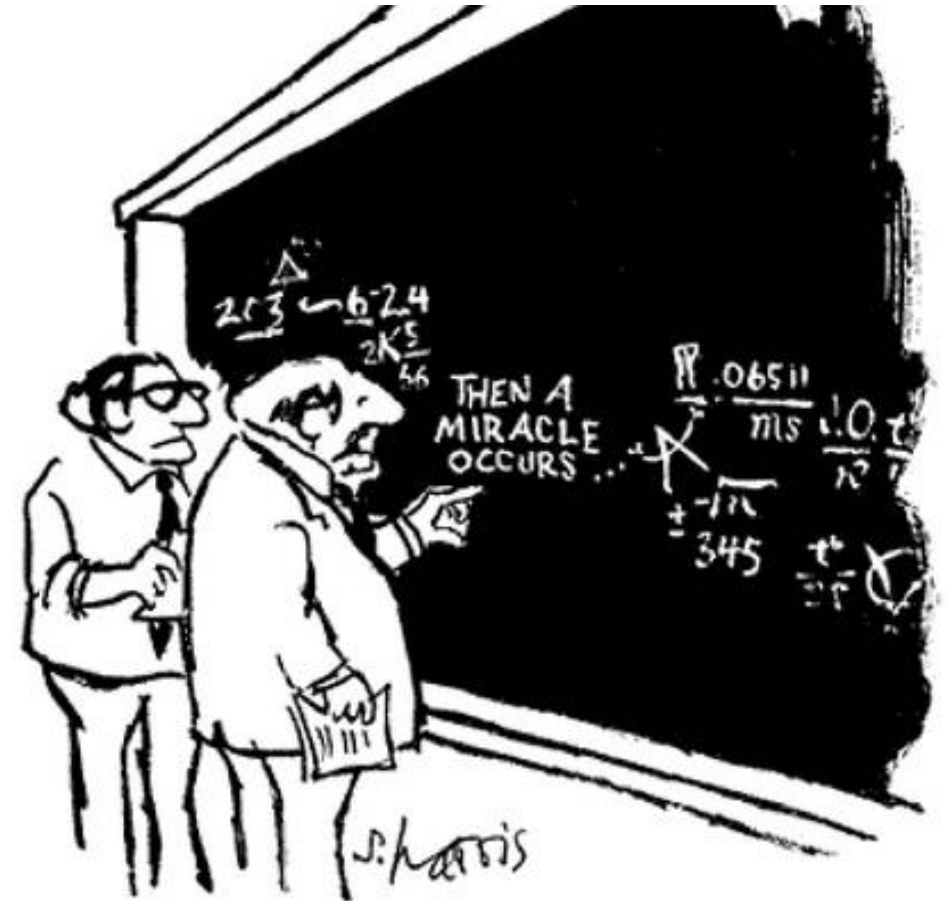
TOPEKA, Kan. — Environmentalists are struggling to get lawmakers to even discuss climate change as a serious issue in Kansas, where some leaders of the Republican-controlled Legislature question the widespread scientific consensus that human activity is dangerously warming the planet.

States such as Virginia, Minnesota and California are pursuing goals for eventually getting all of their electricity from renewable resources. But Kansas proposals aimed at reducing electricity use, making state office space more energy efficient and encouraging farmers to capture and store greenhouse gases have languished without committee hearings.

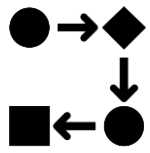


Theory of change: *Why we will win*

- Description of why a certain program and set of activities will result in us achieving our campaign goal
- Helps campaign clarify:
 - Root causes of the problem you are working to solve
 - What exactly needs to change to achieve your goal
 - Some ideas for how to change it



"I think you should be more explicit here in step two."



Sunrise Movement: Our Theory of Change

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



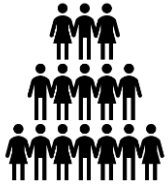
The New York Times

Jeff Bezos Commits \$10 Billion to Address Climate Change

The world's richest man unveiled a fund to help climate scientists and activists, an escalation of his philanthropic efforts.

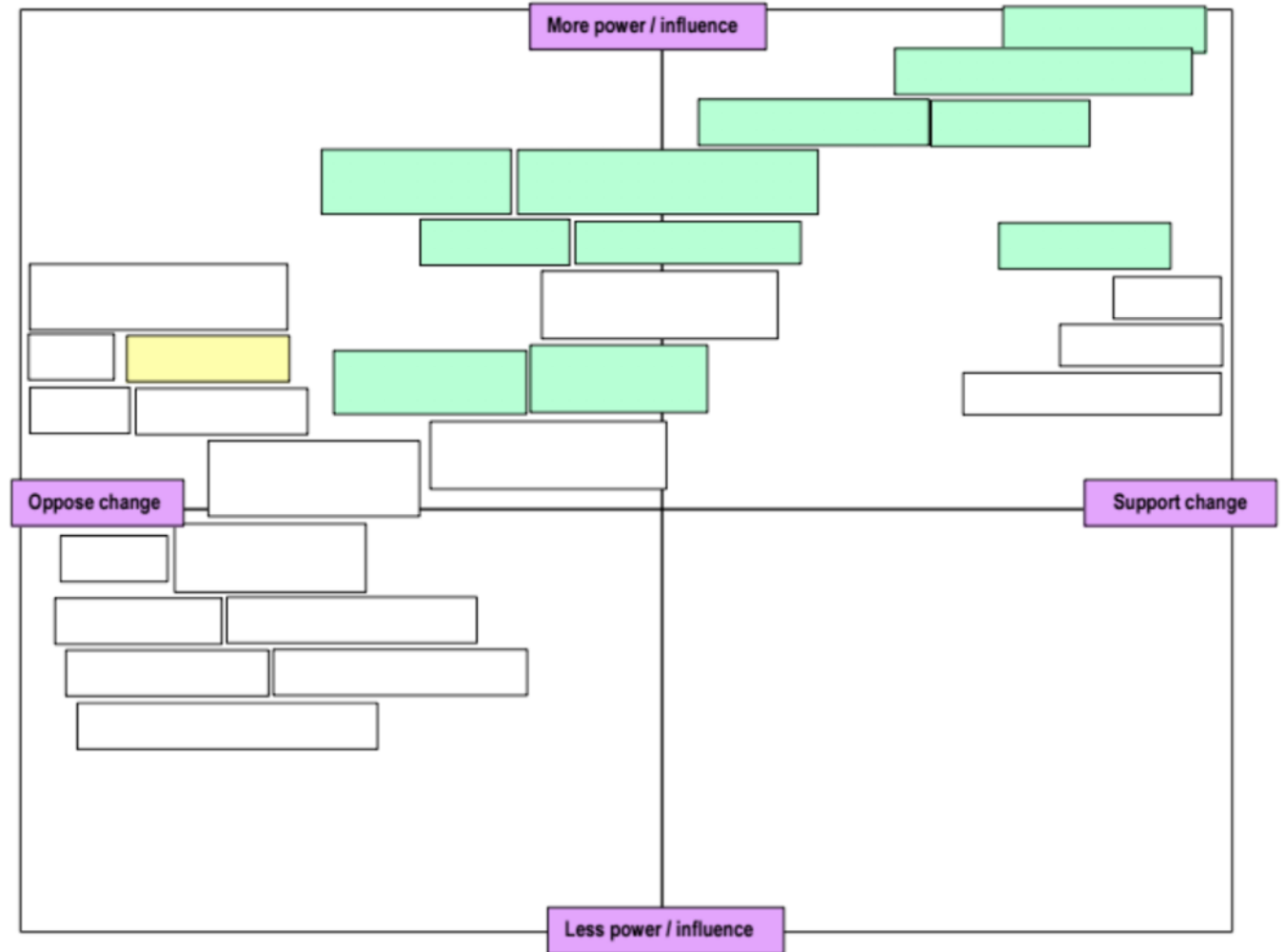


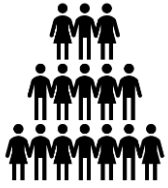
"Climate change is the biggest threat to our planet," Jeff Bezos wrote on Instagram on Monday. Emma Howells for The New York Times



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?





Mapping power in IL via an *epic* spreadsheet

Full Name	Party	Vote	Number of Enviro Members in District	# of people with 80+ energy score in VAN	Caucus Membership	Enviro Voting Record Score	Margin in last election	Key Influences
Jane Green	D	1	2,066	1,798	Green	100	90%	Environment
Kevin Eco	D	1	3,005	2,543	Green	100	85%	Environment
Donna President	D	2	2,453	2,321	Leadership	88	100%	Leadership, members of caucus

# of wind or solar projects in district	Contributions from utility companies	Q1 Clean Energy Supporter	Q2 Responds to Constituents	Q3 Responds to Lobbying	Religion	Biography
5	\$ 1,000	5	4	5	Methodist	Head of the green caucus from a large metro area.
25		5	4	5	Jewish	Wants to be head of the green caucus
6	\$ 37,100	4	1	3	Catholic	Leader of the Senate. Tends to trend moderate despite high levels of local support



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.



NY Renews: Points of Unity + Jemez Principles



- 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.

Jemez Principles for Democratic Organizing

Meeting hosted by Southwest Network for Environmental and Economic Justice (SNEEJ), Jemez, New Mexico, Dec. 1996

Activists meet on Globalization

On December 6-8, 1996, forty people of color and European-American representatives met in Jemez, New Mexico, for the "Working Group Meeting on Globalization and Trade." The Jemez meeting was hosted by the Southwest Network for Environmental and Economic Justice with the intention of hammering out common understandings between participants from different cultures, politics and organizations. The following "Jemez Principles" for democratic organizing were adopted by the participants.

#1 Be Inclusive

If we hope to achieve just societies that include all people in decision-making and assure that all people have an equitable share of the wealth and the work of this world, then we must work to build that kind of inclusiveness into our own movement in order to develop alternative policies and institutions to the treaties policies under neo-liberalism.

This requires more than tokenism, it cannot be achieved without diversity at the planning table, in staffing, and in coordination. It may delay achievement of other important goals, it will require discussion, hard work, patience, and advance planning. It may involve conflict, but

#3 Let People Speak for Themselves

We must be sure that relevant voices of people directly affected are heard. Ways must be provided for spokespersons to represent and be responsible to the affected constituencies. It is important for organizations to clarify their roles, and who they represent, and to assure accountability within our structures.

#4 Work Together In Solidarity and Mutuality

Groups working on similar issues with compatible visions should consciously act in solidarity, mutuality and support each other's work. In the long run, a more significant step is to incorporate the goals and values of other groups with your own work, in order to build strong relationships. For instance, in the long run, it is more important that labor unions and community economic development projects include the issue of environmental sustainability in their own strategies, rather than just lending support to the environmental organizations. So communications, strategies and resource sharing is critical, to help us see our connections and build on these.

#5 Build Just Relationships Among Ourselves

We need to treat each other with justice and respect, both on an individual and an organizational level, in




Communicating for climate action

LOCAL

Environmental groups want a North Carolina Atlantic Coast Pipeline permit canceled

BY LYNN BONNER
AUGUST 13, 2019 04:27 PM

Robeson Rises: Documentary depicts fight against Atlantic Coast Pipeline



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 interstate 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 2018. 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.

Media story

SIERRA The national magazine of the Sierra Club

CLIMATE AND ENERGY LANDS AND WATERS ADVENTURE GREEN LIFESTYLE MAGAZINE

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

A string of court losses are making the gas pipeline increasingly expensive

BY JAMES STEINBAUER | AUG 27 2019



Fallen trees after crews cleared the route for the Atlantic Coast Pipeline in March 2018, in Wintergreen, 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

Key talking points



Organizing narrative



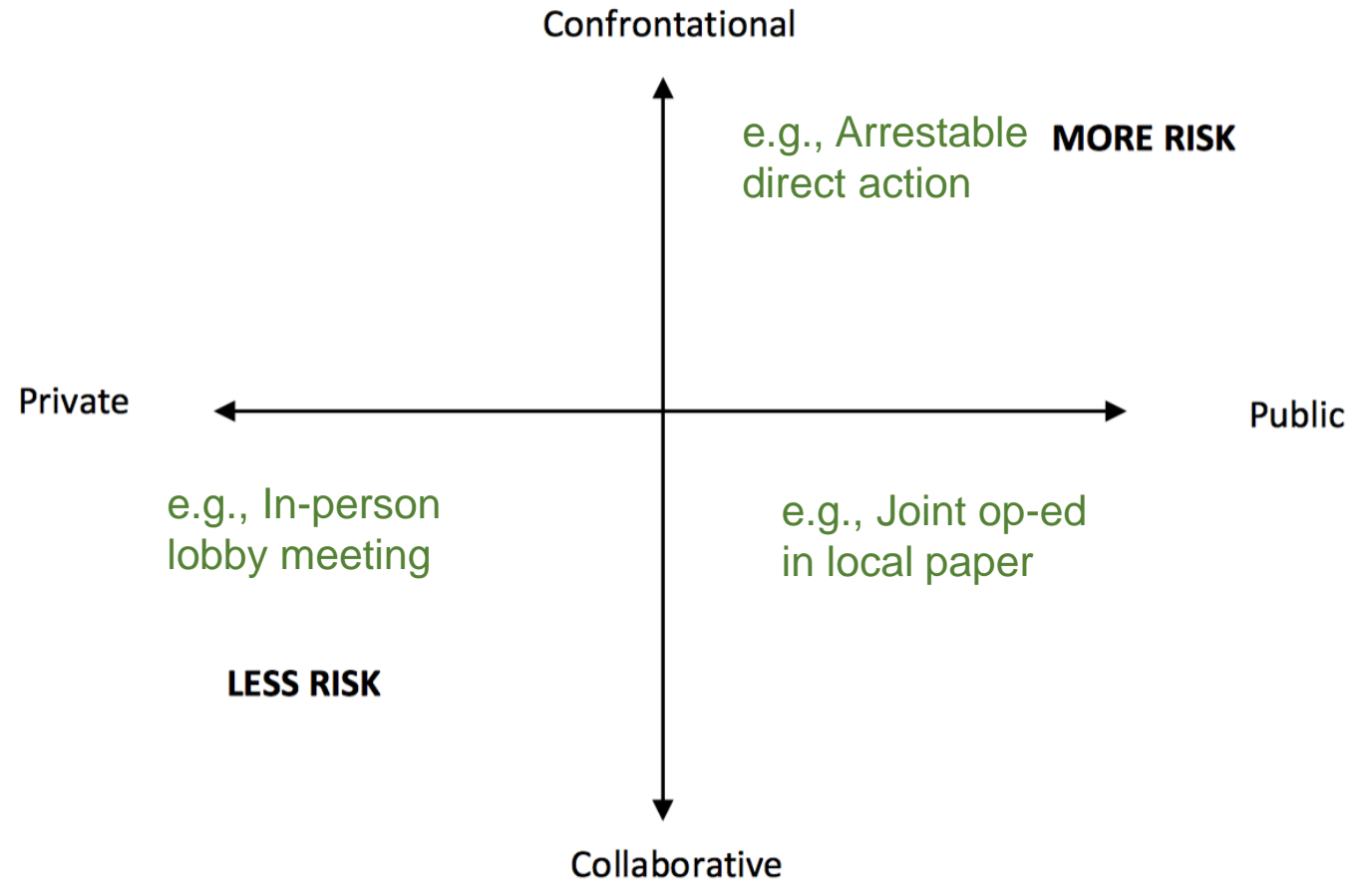
Potential Energy: “Save Florida Man”





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?





Films screenings to build support for solar in SC



Case Study: Using film to advance a landmark

“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.”

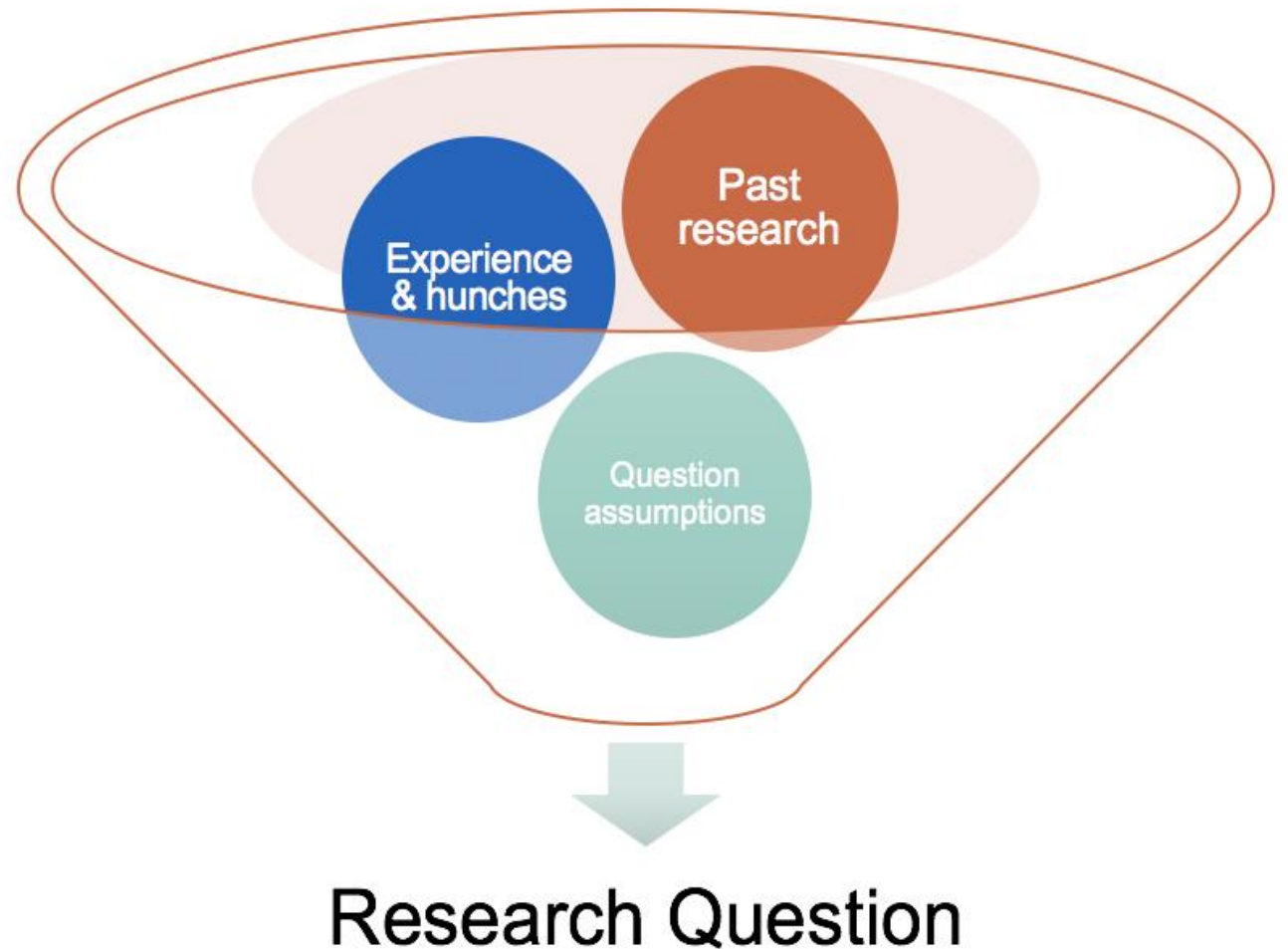
John Tynan
Executive Director of CVSC





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



Cohort	Delivered	Clicks	CTR	Actions	Action rate	Total cost	Cost per action
Social Cohort	64,764	195	0.301%	39	0.060%	\$1,995.00	\$51.15
Text Cohort	13,290	555	4.176%	61	0.459%	\$512.50	\$8.40
Statistically significant	Yes			Yes			



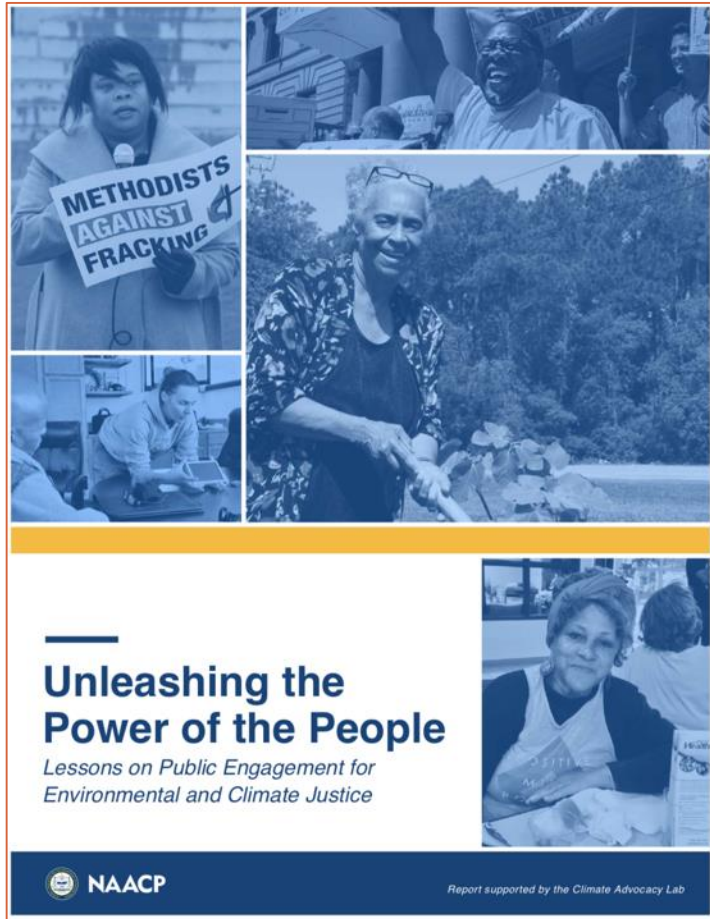
Evaluation

- 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.

Bonus: 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 you need to invest resources and build stronger relationships?
- **Integrating equity:** Who makes decisions about the campaign? Who benefits if a 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 people to take action – and sustain that action-taking? How will the campaign develop trust 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?

