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The Organizer's Guide to the Galaxy: Strategic Planning

The radical right's attacks on Texans' religious freedoms, individual liberties and public schools certainly provide more than enough fodder for outrage. Unfortunately, righteous indignation alone has never achieved a progressive victory. Rather, disciplined strategies supported by diverse tactics are necessary for raising awareness, rallying others and creating change. Whether organizing your campus, working on an election, or creating a policy agenda, having these tools in your proverbial arsenal will position you – and the communities you represent – for sustainable success.

Strategic Planning

Although the importance of planning may seem obvious, it is often overlooked because organizations are caught up in the passion of their cause and certain of their convictions. However, having a written plan is essential because it provides focus and context so we know what we're doing and why we're doing it. Planning allows us to use our resources efficiently and also establishes benchmarks that hold us accountable and enable us to strategically redirect midstream if we encounter bumps in the road. Ultimately, planning democratizes knowledge – meaning that everyone involved in the effort knows the players, the strategy and the timeline, and we are drawing on the team's collective knowledge and expertise.

And while we at TFNEF strive not to hit anyone over the head with a particular point, this one is worth reiterating – a plan is not a plan unless it is written down.

In addition to being written down (and saved to USB drives, and Cloud-like systems like Dropbox or Google Docs, and perhaps tattooed on particularly committed individuals' arms) a strategic plan determines who will do what with whom by when and for how much. This play on the 5 W's "who, what, when, where, and why" we all learned in grade school translates into determining who will be responsible for managing and executing the most effective activities and actions to demonstrate and leverage our power to key decision makers and outreach targets in a timely fashion and within budget. That's a mouthful, right? Luckily for you, our friends at Wellstone Action have broken down strategic planning into four steps: Vision, Assessment, Strategy, and Tactics.

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The Progressive's Existential Crisis: AKA – Identifying Our Vision

Establishing our vision means determining our goal. Our goal is what we want to achieve through our strategic plan. More often than not, the problems we face are intertwined and complicated. Without a process to identify root causes and achievable solutions, it's all too easy to bite off more than we can chew and find ourselves overwhelmed, out-resourced and in over our heads. This is how we lose. To avoid this, we need to follow a process that zeroes in on the specific problem and points to a goal that is strategic, measurable, powerful and achievable.

To assess the problem we need to write a "problem statement." This statement defines the problem in a way that clarifies its causes. For example, a problem statement could be: "State Board of Education members have abused their authority to approve curriculum standards and textbooks so that they can use public schools to promote extremist political agendas, not facts and sound scholarship in Texas classrooms."

After the problem statement has been determined, it's time to brainstorm potential solutions. When brainstorming, it's important to be inclusive of everyone's ideas while remaining focused on your problem statement. We admit it's a fine line to walk, but Wellstone Action and Midwest Academy have created a Goal Criteria tool to help evaluate possible solutions and ultimately identify the goal that best addresses the problem statement.

POSSIBLE SOLUTION	Improves people's lives	Specific & measurable	Winnable (on what timeline)	Alters power relationships	Builds our organization (allies, $)	Excites us

To use this tool, list all the potential solutions you have brainstormed in the first column. Then apply that solution to the other columns to see if the proposed solution not only addresses the problem statement, but also is aligned with the goals and values of your group.

When evaluating if a possible solution improves people's lives, consider whether this course of action will actually help anyone in concrete ways. Weighing if a possible solution is specific and measurable is helpful in ensuring the solution is actually achievable. Asking if the possible solution is winnable forces us to think about whether the "powers that be" would allow this solution to see the light of day. Considering whether the possible solution alters power relationships so people with less power gain access to more power is particularly relevant to achieving social change. Asking if a possible solution builds your organization's strength through allies, membership, or funding is critical to determining if a solution increases your group's long-term power. Finally, gauging if a possible solution excites your group is indicative of whether you'll be able to generate, sustain and grow your organization's interest and commitment to the campaign.

The Goal Criteria listed here isn't definitive. In fact, it's important for your group to include additional criteria that speak directly to your values, circumstances and needs. However, the criteria recommended here establish a strong foundation against which you can weigh possible solutions. After plugging in the possible solutions and checking off which solutions match what criteria, you'll be able to identify the specific solution that best addresses your tailored problem statement. In other words: congratulations are in order. You now have your goal.

Assessment: Getting the Lay of the Land
Now that you've identified your problem statement and goal, it's time to assess the environment you're operating within. While there are a number of tools that can be used to determine who holds power and how to get it, "power mapping" is particularly powerful (pun intended). "Power mapping" is a visual representation of where power relationships currently stand around the issues your group cares about. It also illustrates how we can rearrange power dynamics to win.
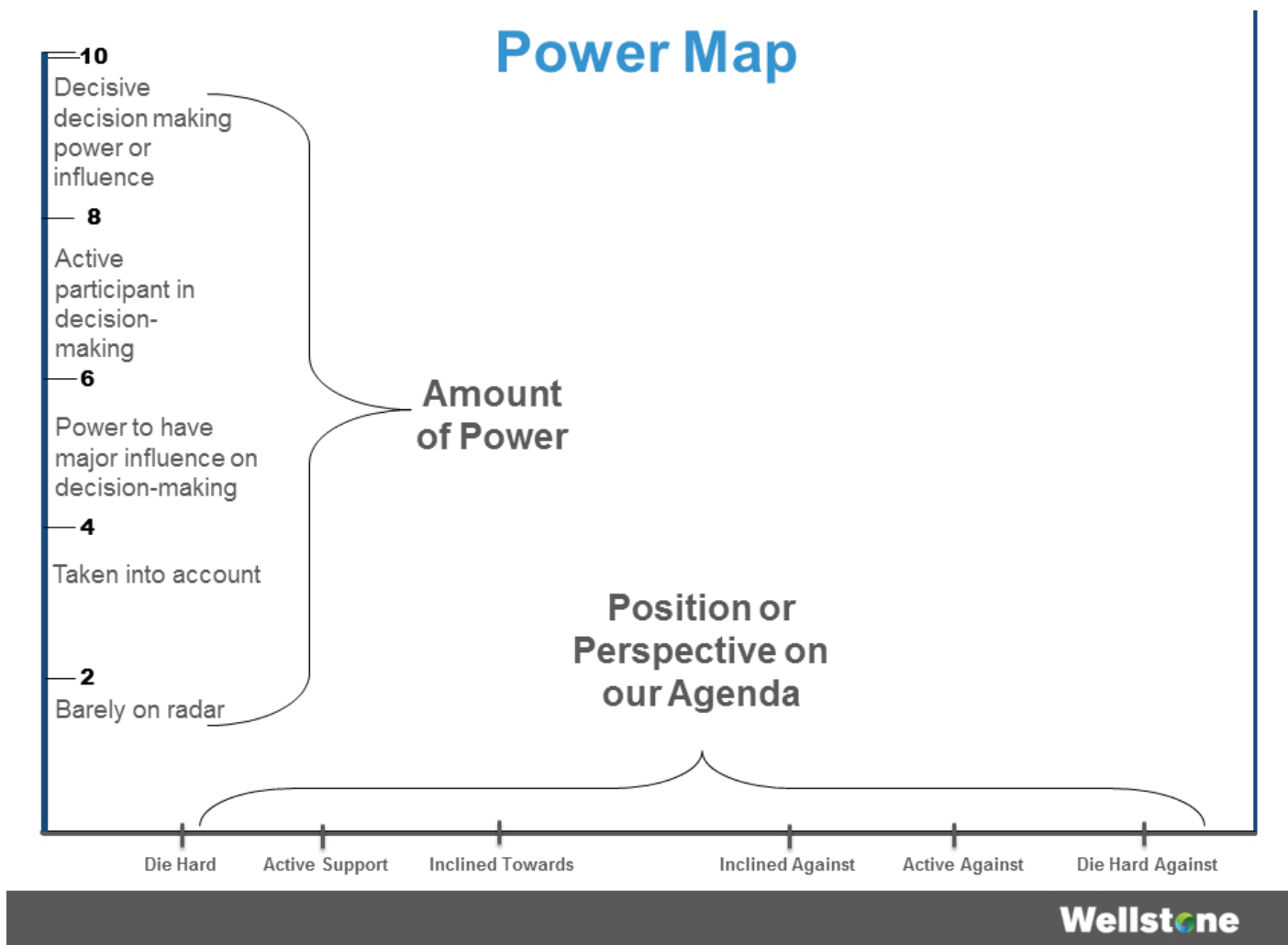
A power map contains key players:
• *Decision makers:* the people who actually make the decisions needed to resolve the problem. These are the people with the power to give your group what it wants. Depending upon your problem statement and goal, this group may include the leadership and governing board at your university, City Council members, local voters, or members of Congress. Decision makers are primary targets in our power map because of their ability to directly enact change to solve the problem you've identified.

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- *Organized allies:* organized groups who support your agenda. Organized allies are considered secondary targets in our power map because they influence decision makers.

- *Organized opposition:* organized groups who oppose your agenda. Similar to organized allies, organized opposition are also secondary targets because of their ability to exert influence on decision makers rather than make the decisions themselves.

While secondary targets are traditionally organizations looking to advance their agenda, individuals with close connections to decision makers can also be secondary targets on our power map. For example, the partner or spouse of a decision maker, a trusted childhood friend, or even members of a decision maker's religious congregation can be secondary targets because of their ability to influence the decision maker.

Once we've identified who should populate our power map – the decision makers, organized allies, organized opposition, and individuals of influence who are secondary targets – we need to examine the power map.

Power Map

10 — Decisive decision making power or influence

8 — Active participant in decision-making

6 — Power to have major influence on decision-making

4 — Taken into account

2 — Barely on radar

Amount of Power

Position or Perspective on our Agenda

Die Hard | Active Support | Inclined Towards | Inclined Against | Active Against | Die Hard Against

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As you can see, the vertical axis is a scale of 0-10, which directly corresponds to a person's decision-making power. There are few, if any, "10s" – people with absolute power who can make your group's vision a reality with a snap of their almighty fingers. Equally so, there are few, if any, "0s" – people with no sway whatsoever.

More likely, you'll find yourself placing people who are able to make decisions and/or exert strong influence along the "8" or "9" portion of this gamut. For example, a person who is placed at "8" is someone who is sitting in the room as an active participant when the decision is being made. While most decision makers are at this level, few organized groups operate here. Rather, groups can be placed at the "5" or "7" level if they are able to meet with a decision maker and generate press coverage about an issue. These groups have power because their opinions will be taken into consideration by decision makers due to their demonstrated ability to effectively organize their members. Less effective organizations should be placed at a "2" or "3" level.

The horizontal axis measures relative support for our goal. Our core constituencies and die-hard supporters occupy the far left of this axis. These groups and individuals not only support our cause on paper. They are also actively engaged in working with us and commit resources like time, human capital, and funding to our cause. These individuals may be the founding members of your cause. (Like you – yes, you are included in the power map!)

Organizations and individuals who fall into the "Active Support" portion of this axis include those who give us their verbal or written endorsement. They may write a letter to the editor or testify on your cause's behalf. However, the distinguishing factor between "Active Supporters" and "Die Hards" is that Active Supporters don't commit significant resources to help us achieve our goal, whereas Die Hards adopt an "all hands on deck" mentality.

Groups should be placed in the "Inclined Towards" area if they are likely allies who share an ideological predisposition for support, have worked with you in the past, or are major stakeholders who will be impacted positively by your agenda.

The middle area of this axis is for groups and individuals whose stance is neutral or unknown.

Organizations that are most likely opposed to our goal based on their beliefs and/or practices should be placed in the "Inclined Against" portion of the axis. Groups who have publicly dismissed our cause and voiced their opposition to our goal should be classified as "Active

Against." Finally, groups that are not only adamantly against our goal but are also allocating resources to defeat us should be deemed as "Die Hard Against". While it may seem counter-intuitive to include decision makers and groups who are against our cause in our power map, it's actually critical to incorporate them as you assess your environment. Knowing and, more importantly, understanding your opposition and their connections allows you to anticipate their potential attempts to discredit your cause and empowers you to proactively inoculate yourself from attacks.

Now it's time to put the targets we've identified on our power map. The placement of decision makers, allies, opponents, and key influential individuals is a critical activity and often involves a lot of discussion. At times you will see some disagreement among team members. This is okay, and in fact, it is expected. Remember: one of the main purposes of planning is to democratize knowledge so everyone involved knows the players and strategies. We want to draw on your team's collective knowledge and expertise. The key to successful power mapping is to be self-aware when determining your own power and honest when evaluating other's relative power – including the good, the bad and the downright ugly.

After your power map is complete, take a step back. Literally – step away from the map. Take a moment to absorb the full picture you and your team have created. Voilá – you have identified your key targets and know where they stand on the solution you've identified to solve your problem statement. This means you're ready to move on to the third step of planning: developing your strategy.

Strategy: Creating Your Path to Victory

Now that you know who your targets are and their respective stances on your goal, you must determine how you're going to earn enough support for your vision to become a reality.

There are three main ways to realign a power map to position yourself for victory. You can move your primary targets – the decision makers – to the left in greater support of your cause. Similarly, you can move your allies up and to the left – essentially making your coalition partners more powerful and enhancing their commitment to your cause. Finally, you can identify relationships between primary targets and allied groups and leverage those connections on behalf of your cause to shore up support from decision makers who are on the fence.

Use your power map as a tool when developing these strategies and bridging connections. Go nuts: draw arrows on your map or tie string from organizations to decision makers or

between decision makers and back to organizations – whatever helps you understand their relationships and what will motivate them to support your goal.

Once you know what you need to do to secure the support of decision makers, write your strategy down. Forgive us for belaboring the point, but remember: if it's not written down, it doesn't exist. Your strategy doesn't need to be a novel – Ulysses this is not. All a strategy statement needs to do is establish who will execute what actions to demonstrate power to key decision makers and targets by when. It's the "5 W's" from elementary school, remember? Turns out paying attention in third grade pays off in dividends when advocating for progressive change in your community. Who knew? Just in case you were absent from class that day (we won't judge), here's a sample strategy statement:

Texas Freedom Network Education Fund Strategy Statement for ABC Cause

Legislators X and Y are key to winning. Legislator A is our bill's champion.

Legislator A will use her relationships to persuade Legislator X to co-sign the bill and secure Legislator Y's vote in favor of the bill.

Group 1 will ask their close ally, Legislator X, to support the bill.

Group 2 will use their close ties with Group 3 to secure support from Legislator Y.

Group 1, 2, and 3 will participate in general mobilization activities to create visibility and energy for our bill.

But what general mobilization activities will the groups be participating in, you ask? Funny you mention it, because that leads us to the fourth and final step of strategic planning: tactics.

Tactics: Putting Your Strategy in Motion
Tactics are the activities you will use to execute your strategy. These are actions that educate and build your base around an issue, apply pressure to a decision maker, or, ideally, both! (Who doesn't like a good two-fer?) Ultimately, we use tactics to persuade decision makers to support our agenda.

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Some of the most common tactics involve earned media, like letter writing campaigns and op-eds to local papers from a trusted community member. While we don't actually pay for earned media like we would fork over dollars for a television ad or a radio spot, we certainly have to work for it. After all, the average person has to hear a message five to seven times over a short amount of time in order for it to sink in.