

|  |
| --- |
| **STRATEGIC**  **CAMPAIGN PLANNING** |

**What’s Inside?**

* + What is a Campaign Plan?
  + Terms & Definitions
  + Strategic Campaign Plan Example
  + Strategic Campaign Plan Template

**WHAT IS A CAMPAIGN PLAN?**

A campaign plan is a strategic outline designed to achieve a specific objective. While political campaigns often come to mind—such as presidential campaigns or senate races, which are extensive, multifaceted, and involve numerous organizations—campaign plans are not confined to the political arena. They are versatile tools that can be applied to a wide range of goals.

Campaigns can be tailored to various purposes, from influencing elected officials to recruiting more volunteers for your organization, or even aiming for a promotion at work. The key is to broaden our perspective on what constitutes a campaign. It is not limited by scale or scope but defined by the intention and structured approach toward achieving a desired outcome.

A well-crafted campaign plan serves as a vital resource, helping you evaluate the current landscape and providing a detailed blueprint of the necessary steps to reach your objective. Whether your campaign is large or small, having a clear plan is essential for success.

This Campaign Plan Template is intended to focus efforts and resources toward goals that deliver on in the most efficient and effective manner possible. Before you start filling out the campaign plan template, please check the Advocacy Roadmap. This will help you make sure you’ve done everything you need to get ready for planning your campaign.

Some key considerations include:

* What are the requirements for people, expertise and time to staff this effort? Does it exist or does it have to be built?
* Who is the target audience for this effort and what do we want them to do? Are we trying to change their minds or change their behaviors?
* Who/What is the opposing force to this effort? How well funded and organized is the opposition?
* What does success look like? What are indicators that progress is being made toward achieving success, and can it be measured?

After you’ve done all of this, you’re ready to dive into the campaign planning process.

Let’s get planning!

**KEY TERMS AND DEFINITIONS**

Long-term Goal: Your goal(s) should be your big, overarching mission. So for example, “Ensure affordable and accessible healthcare for all.”

Short-term Objectives: Your objective is when it gets more specific. If you all are familiar with S.M.A.R.T goals (goals that are simple, measurable, achievable, relevant, and time-bound) this is where they would go. Your objective should be the measurable smaller step that will contribute to achieving your big goal. A great example of an objective is passing a bill.

Strategies: Strategies are your overall approach to achieving your objectives, and ultimately, your goals. For example, your strategy can be to elevate your presence on social media to build support for Medicaid expansion.

Tactics: Tactics are the specific actions and tools you will use. In following with our example, your tactics could include twitterstorms, live streaming, or doing an action where you coordinate pro Medicaid graphics within your coalition. Your tactics should include metrics.

Targets: Your audience, your persuadables, the people and/organization you are trying to reach

Metrics: Your measures of success for both intermediate and desired outcomes; these will assist you in tracking impact and efficiency

**EXAMPLE STRATEGIC CAMPAIGN PLAN**

|  |  |
| --- | --- |
| **Campaign Name** | Protect the ACA |

|  |  |
| --- | --- |
| **Long-term Goal** | Stop the Courts from Eliminating the Affordable Care Act (ACA) |

|  |
| --- |
| **Short-term Objectives** |
| 1. Raise public awareness about this stealth threat to the ACA  2. Focus local and national media attention on repeal efforts to help rally health care voters  3. Create a popular anti-repeal context in which the SCOTUS must rule on the merits of the case |

|  |
| --- |
| **Strategies** |
| 1. Provide Advocates with tools/resources to mobilize consumers  2. Raise the profile of the case and xx’s work in national media markets  3. Invest funds in target states to mobilize rapid response efforts |

|  |  |
| --- | --- |
| **Tactics & Metrics** | |
| **Final Outcomes** | **Intermediate Outcomes** |
| 1. Create at least 10 new tools/resources to send out to lists in steady stream over the course of the year  2. Reach out to press contacts to arrange 4 national media quotes from or mentions about xx  3. Identify 3-5 state advocacy partners based on capacity, interest, past success in rapid response, political feasibility, and reachable targets to provide funds to | 1. Hire a communications specialist with copy-writing and design skills  2. Get buy-in from Board on organization’s new mission statement and external messaging  3. Develop and finalize RFP (Request for Proposal) as well as ensure the RFP process centers equity |

|  |  |
| --- | --- |
| **Targets** | AZ, WV, WI, TX |

|  |
| --- |
| **Key Messages** |
| 1. This case is part of a long line of attacks on the ACA  2. Millions of people will lose coverage  3. People with pre-existing conditions are most at risk of losing coverage |

|  |  |
| --- | --- |
| **Tools & Resources** | 1. **Organizing:** Action alert; Advocacy guide; CAP data; state outreach re: rapid response plans  2. **Media:** Press release template; sample Op-Eds  3. **Digital:** Sample tweets; sample graphics |

|  |
| --- |
| **Collaborators & Partners** |
| 1. Families USA  2. Center for American Progress (CAP)  3. Mom's Rising  4. State Partners |

|  |  |
| --- | --- |
| **Budget** | $100k |

|  |  |
| --- | --- |
| **Timeline** | Fall 2019: prepare for decision |
| Dec 18, 2019: decision date |
| Jan 2020: develop state target plan and roll out funding for rapid response |
| Feb-June: track progress on state rapid response campaigns |

**STRATEGIC CAMPAIGN PLAN TEMPLATE**

|  |  |
| --- | --- |
| **Campaign Name** |  |

|  |  |
| --- | --- |
| **Long-term Goal** |  |

|  |
| --- |
| **Short-term Objectives** |
| 1.  2.  3. |

|  |
| --- |
| **Strategies** |
| 1.  2.  3. |

|  |  |
| --- | --- |
| **Tactics & Metrics** | |
| **Final Outcomes** | **Intermediate Outcomes** |
| 1.  2.  3. | 1.  2.  3. |

|  |  |
| --- | --- |
| **Targets** |  |

|  |
| --- |
| **Key Messages** |
| 1.  2.  3. |

|  |  |
| --- | --- |
| **Tools & Resources** | 1.  2.  3. |

|  |
| --- |
| **Collaborators & Partners** |
| 1.  2.  3. |

|  |  |
| --- | --- |
| **Budget** | $ |

|  |  |
| --- | --- |
| **Timeline** |  |
|  |
|  |
|  |