

Making a Plan to Win: Companion Toolbox



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How to Use the Making a Plan to Win Toolbox

What do you mean by “companion toolbox”?

This is called a companion toolbox because it does not stand alone. This companion toolbox is meant to be used alongside the **Making a Plan to Win: How to Run an Advocacy Campaign** tool. This toolbox has blank versions of the charts demonstrated in the Making a Plan to Win: How to Run an Advocacy Campaign tool, as well as additional tips that build on the information in that tool.

What if I don't have the Making a Plan to Win tool?

You can download it from <http://pacific-alliance.org/resource-guides/>.

How do I use the charts in this toolbox?

The best way to use the charts is to print out copies so you and your team can fill them out together. Each of the charts matches up with part of the Making a Plan to Win tool, so it's easy to find the chart you need.

Midwest Academy Strategy Chart

After choosing your issue, fill in this chart as a guide to developing strategy. Be specific. List all the possibilities.

Goals	Organizational Considerations	Constituents, Allies & Opponents	Targets	Tactics
<p>1. List the long-term objectives of your campaign</p> <p>2. State the intermediate goals for this issue campaign. What constitutes victory?</p> <p>How will the campaign...</p> <p>...Win concrete improvement in people's lives?</p> <p>...Give people a sense of their own power?</p> <p>...Alter the relations of power?</p> <p>3. What short-term or partial victories can you win as steps toward your long-term goal?</p>	<p>1. List the resources that your organization brings to the campaign. Include money, number of staff, facilities, reputation, etc.</p> <p>What is the budget, including in-kind contributions, for this campaign?</p> <p>2. List the specific ways in which you want your organization to be strengthened by this campaign. Examples:</p> <ul style="list-style-type: none"> • Expand leadership group • Increase experience of existing leadership • Build membership base • Expand into new constituencies • Raise more money <p>3. List internal problems that have to be considered if the campaign is to succeed</p>	<p>1. Who cares about this issue enough to join in or help the organization?</p> <p><i>Whose problem is it?</i></p> <p><i>What do they gain if they win?</i></p> <p><i>What risks are they taking?</i></p> <p><i>What power do they have over the target?</i></p> <p><i>Into what groups are they organized?</i></p> <p>2. Who are your opponents?</p> <p><i>What will victory cost them?</i></p> <p><i>What will they do/spend to oppose you?</i></p> <p><i>How strong are they?</i></p> <p><i>How are they organized?</i></p>	<p>1. Primary Targets</p> <p>A target is always a person. It is never an institution or elected body.</p> <p><i>Who has the power to give you what you want?</i></p> <p><i>What power do you have over them?</i></p> <p>2. Secondary Targets</p> <p><i>Who has power over the people with the power to give you what you want?</i></p> <p><i>What power do you have over them?z</i></p>	<p>For each target, list the tactics that each constituent group can best use to make its power felt.</p> <p>Tactics must:</p> <ul style="list-style-type: none"> • Have context • Be flexible & creative • Be directed at a specific target • Make sense to the membership • Be backed up by specific form of power <p>Tactics include:</p> <ul style="list-style-type: none"> • Media events • Actions for information and demands • Public hearings • Strikes • Voter registration & voter education • Lawsuits • Accountability sessions • Elections • Negotiations

Midwest Academy Strategy Chart

Goals	Organizational Considerations	Constituents, Allies & Opponents	Targets	Tactics

Power Chart Worksheet

<i>Who has the power?</i> Who has the ability to address our issue?	<i>What is that power?</i> What is their ability to address our issue? How much power do they have?	<i>Potential Target</i> Of those who have "power," identify potential "targets." Who can we put pressure on to address our issue?

Target Worksheet

From the previous Power Chart exercise, list one of your potential targets.

TARGET # _____: _____

OUTCOMES:

What do you want your "target" to DO about your issue? What actions do you want to see them take?

STRATEGY & TACTICS:

Strategy is about changing the relationship between you and your target. By changing this relationship, you can gain support for your issue. Your strategy tells you how you want the relationship between you and your target to change.

Tactics are the specific steps in carrying out the strategy. Your tactics tell you HOW you are going to change the relationship, and what specific things you are going to need to do. **What is your strategy? What tactics will you use to get the OUTCOMES that you want?**

RESOURCES:

What resources can you call upon to help you reach your "target"?

GOAL:

Re-read what you wrote above. What is the ultimate goal you want to achieve?

Planning Worksheet

From the goals you have created for your “targets”, choose either your main goal or the goal you would like to work on first.

GOAL: _____

Timeline <i>Determine by when you want to achieve the goal</i>	Action Steps/Tactics <i>List what needs to happen to achieve the goal. (These are the individual steps.)</i>	Resources <i>What resources are already available? What resources are needed?</i>

Task Worksheet

After you decide by when you want to achieve your goal, you should create a timeline and assign tasks. The timeline will help you plan out what needs to happen by when in order to reach your goal. We recommend you develop your timeline by starting at your end goal and think through each step to get there.

Date	Task List	Who will do task?
<i>Start Date</i>		
<i>Amount of time needed to complete task before action day</i>		
<i>Day of Action</i>		

Power Analysis Worksheet

g. Why are they making the decision that way?

h. How is this decision made?

Who or what is important to them?

a. Do the people in power have clients? Customers? Friends?

b. Do they have a public image they care about?

c. Do they have allies in the community? In other places?

Power Analysis Worksheet

Our power

What is our community?

- a. What other groups might share our concerns?

- b. What other groups have different concerns but the same target?

- c. Who else is affected by their decisions?

What resources/capacity do we currently have?

- a. How much “people power” do we have? What are those people willing to do?

- b. What are our funding and material resources?

- c. What spaces do we control that may help us to confront them?

Power Analysis Worksheet

d. What do we need to successfully make the changes we want to see?

What are our strengths and weaknesses?

a. What do we do well?

b. What abilities and skills do we have in our group?

c. Where have we made mistakes in the past?

d. What are we not able to do well?

e. What abilities/ skills do we need that are not in the group?

Power Analysis Worksheet

What is happening in the outside world that will affect the campaign?

a. What else is happening that may impact this fight?

b. What is the media talking about and how do they talk about it?

c. What are average people saying about this issue?

d. What is the past history on this issue? How do people feel?

e. Can groups take action on this issue successfully? Against these people in power?

Evaluation Worksheet

Process

How well did we communicate?

What tools did we use to plan our strategy?

Did we give ourselves enough time to plan our actions?

How well were tasks delegated?

What did we learn and what could we change to be more effective next time?

.....Outcome.....

What was our goal? Did we reach it?

What was the actual outcome of the action?

What did we learn and what could we change to be more effective next time?

Impact

What was our intended long-term impact?

Did we make changes that move toward our long-term impact?

If so, how?

If not, why not?

What did we learn and what could we change to be more effective next time?

Writing for the Press: Tips

- When a media organization writes about something to do with people with disabilities, this is when it is best to send a **letter to the editor** or an **op-ed**.
- When your self-advocacy organization wants to update its members about something the organization is doing, this is when it is best to make a **press release**.
- When your self-advocacy organization has something it wants to say about an issue, a **public statement** is best.
- When your self-advocacy organization is putting out a letter to the editor or an op-ed, make sure it is following the guidelines the media organization has on its website.
- When your self-advocacy organization is putting out any of these materials, remember that people who work in media may use all or parts of it as quotes in their media stories. Your organization should make sure it is able to be quoted.

Writing for the Press: Media Advisories and Press Releases

What is a media advisory?

A media advisory alerts the media, in a concise manner, to upcoming events (like a press conference). Think of it like an invitation that answers only the important questions: Who, What, When, Where, and Why.

What is a press release?

A press release has a different purpose than a media advisory. It should read like an article, with quotes and facts, to stimulate possible pick-up by small papers and to generate print and broadcast reports at larger outlets. Whereas a media advisory offers basic information, a news release creates an image and story that journalists can use alone or use as background when writing a story.

Media Advisory Example

Media Advisory

Freshii Workers Union and Supporters to Picket Monday, September 15th

As the Freshii Workers' Union continues to weather attacks and union-busting tactics in their fight for official recognition and basic respect, union members and supporters will stage an informational picket denouncing Peter Irie's prolonged campaign against organized labor.

What: Informational picket

Who: The Industrial Workers of the World Freshii Workers' Union and supporters

When: Monday, September 15th, 11 a.m. to 2 p.m.

Where: 200 W Randolph St, Chicago, IL 60606

Why: To inform the public of Irie's actions against Freshii workers and demand an end to these actions.

For more information, contact:

Alison O., 555-555-5555, alison@email.com or

Mike K., 555-555-5556, mike@email.com.

Freshii Workers' Union Facebook page: www.facebook.com/FreshiiUnion640

Press Release Example

Freshii Union Busting Continues; Workers Picket

Freshii Workers' Union members and supporters staged a picket today to demand an end to abuses by Freshii franchise owner Peter Irie.

The assembled group demanded that Irie re-hire illegally fired workers, cease union-busting tactics and attacks on union supporters, and officially recognize the Freshii Workers' Union (FWU).

"Peter thinks that he can continue to abuse and disrespect his workers with no repercussions," former Freshii employee Heather Sprigler said.

With Sprigler's help, the FWU recently won back nearly \$2,000 in unpaid back wages for store employees. Sprigler was subsequently fired for concerted activity. Irie officially cited Sprigler's role in the campaign to recover unpaid wages as a reason for her termination.

The campaign included a march on the boss on August 1. Freshii workers delivered a letter to Irie that demanded that he end wage theft practices and deliver unpaid wages to the workers in full by August 8.

Sprigler was not the first Freshii employee fired after participating in union organization. Marcos Patino was fired after taking part in the march. Irie claimed that the store did not have enough business to keep Patino on staff, but Irie immediately advertised job openings after firing Patino from the store.

After Patino's firing, the FWU organized a phone zap for August 5. Phone zaps involve supporters repeatedly calling and sending fax messages.

"The phone zap was extremely inspiring," one Freshii worker and FWU organizer said. "We started receiving faxes around 5am, and they were messages of solidarity from all around the world.

"Phones never stopped ringing as long as I was in the store. We felt an overwhelming support both for Marcos and for our desire for union recognition," they continued.

That evening, Irie called Patino to set up a meeting to discuss his re-hiring. Irie later cancelled the meeting and allegedly refused to re-schedule.

Since Sprigler and Patino's firings, other Freshii workers have expressed concern about Irie's actions towards store employees. Employee and union organizer Alison Olhava recently had her scheduled work hours reduced from 35 to 8 per week after taking an authorized week off of work due to contagious illness.

Irie has allegedly refused to meet with Alison and her union representatives to discuss this change in scheduling.

The FWU has filed a number of Unfair Labor Practice charges against Irie's company, Nutritionality, Inc., which are currently being investigated by the National Labor Relations Board.

Union members and supporters stressed the importance of other direct actions while they await the NLRB's official decisions.

"I've talked to other workers who were afraid that Peter might lash out against them," union organizer Kai Tross said. "I think that a picket is important to show other workers that they are not alone — there are people all over who will come out and have their back."

Tross has never worked at Freshii, but is a member of the Industrial Workers of the World (IWW). The Freshii Workers' Union is organized under the IWW, an international member-run union for workers in all industries.

The picketers organized outside of Irie's 200 W. Randolph St. store at 11 a.m. today, and used the hashtag #FightFreshii to live blog the event on social media networks. Organizers were optimistic about continuing their campaign after today's event.

"We might just be a small group of workers at a franchise, but the fact that we can come together and win back wages has shown me that a few people can do amazing things when they stand up together to fight," Olhava said.

Updates on the Freshii Workers' Union campaign are posted to their Facebook page at www.facebook.com/FreshiiUnion640.

Further Reading & Templates

CBS News - How To Write a Press Release, with Examples

<http://www.cbsnews.com/news/how-to-write-a-press-release-with-examples/>

The Guardian - How to write an effective press release

<http://www.theguardian.com/small-business-network/2014/jul/14/how-to-write-press-release>

Huffington Post - 8 Tips for Writing a Great Press Release

http://www.huffingtonpost.com/zach-cutler/press-release-tips_b_2120630.html

The Leadership Conference on Civil and Human Rights - Writing a Media Advisory

<http://www.civilrights.org/census/media/media-advisory.html>

Communications Consortium Media Center - Press Releases and Advisories

<http://www.ccmc.org/node/15919>

Public Relations Matter - Creating a Media Advisory

<http://publicrelationsmatters.com/2011/03/03/creating-a-media-advisory-2/>

Writing for the Press: Op-Eds

What is an op-ed?

An op-ed is a piece written for print journalism that expresses opinions of somebody who is not associated with the publication's editors.

Op-Ed Templates

For Op-Eds About Legislative Activity

Dear Editor,

I am writing on behalf of [Your Self-Advocacy Organization Name] in support of/condemnation of [Bill Number and Name].

People with disabilities have the right to [Topic], [Topic], and [Topic]. [Give more detail why here.] [Bill Number and Name] will allow/prevent people with disabilities to [Topic], [Topic], and [Topic] because [Reason A], [Reason B], and [Reason C].

We urge the public to contact their elected officials and ask them to support this bill.

Best,
[Your name]
[position in the self-advocacy organization]

For Op-Eds About Negative Portrayals of Disability in Media

Dear Editor,

On [Date], [Media outlet] published a story on [Topic] entitled [Title]. In the story, [Media Outlet] described people with disabilities as [adjective], [adjective], and [adjective]. People with disabilities are not [adjective], [adjective], or [adjective]. People with disabilities are [adjective], [adjective], and [adjective]. [Give more detail about this here]

Best,
[Your name]
[Position with self-advocacy organization]
[Name of self-advocacy organization]

Writing for the Press: Public Statements

What is a public statement?

When a big news event happens, reporters look for quotes to use in their stories. A public statement is basically a long quote from your organization about a recent event.

Public Statement Template

[Self-Advocacy Organization Name] condemns/applauds [recent action].

[Reason 1 how this is good/bad with detail]

[Reason 2 how this is good/bad with detail]

[Reason 3 how this is good/bad with detail]

[Request for action here (governmental agency to take action, members to contact legislators, etc.)]

Examples

ASAN Statement on Sentencing in Jude Mirra's Murder

<http://autisticadvocacy.org/2015/06/asan-statement-on-sentencing-in-jude-mirras-murder/>

ASAN Statement On JRC At Association for Behavior Analysis International Conference

<http://autisticadvocacy.org/2015/05/asan-statement-on-jrc-at-association-for-behavior-analysis-international-conference/>

ASAN Statement on #JusticeForKayleb

<http://autisticadvocacy.org/2015/04/asan-statement-on-justiceforkayleb/>

ASAN Statement on New Jersey Assisted Suicide Bill Hearing

<http://autisticadvocacy.org/2014/12/asan-statement-on-new-jersey-assisted-suicide-bill-hearing/>

More can be found at <http://autisticadvocacy.org/?s=asan+statement>.

Rallies and Protests

Common Roles Among the Protest Leadership

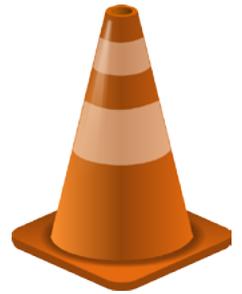
Communication and planning

- The most well-organized people who take the best notes should take this role.



Marshal

- Marshals protect marchers/participants from hostile outsiders.
- As the marshal will be a very visible figure, they have to be confident. It also helps for the marshal to be loud and not afraid of confrontations. This doesn't mean they have to be physically powerful.



Speaker

- Speakers need to be well-spoken and comfortable with public speaking.
- Don't force anyone to speak who doesn't want to.



Media spokesperson

- The media spokesperson is also responsible for sending media/press releases.
- Preferably, people with journalistic training should be media spokespeople.
- Press releases have a certain format, and to be taken seriously, they need to be written by someone who knows how.



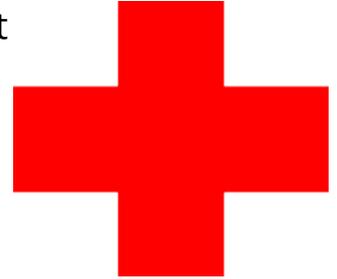
Police liaison

- Someone who knows local, state, and federal laws protecting civilians from police should do this.
- The police liaison's critical jobs include informing protesters about their rights.



Street medic

- Responsible for attending to any participants who may get injured during the action.
- The medic should have some kind of medical training. They don't need to be a fully licensed doctor or nurse, but they must know advanced first aid and be calm under pressure.



Outreach

- Outreach responsibilities include handing out flyers and gathering contacts.
- Outreach doesn't require any special qualifications, other than being outgoing, or graphic skills if the outreach people are making their own flyers.



Photographers and filmographers

- Photographers and filmographers just need to be skilled with a camera, as well as brave - it's possible they may have to document violence if the protesters are opposed by violent groups.



Tips for a Successful Rally

Appoint a Team Leader

- Disorganization is one of the biggest issues you want to avoid.

Appoint spokespeople

- You want the most eloquent and on-message people possible to speak for your organization.

Schedule the event for midday for maximum attention

- Most people will be out and about in public then. This way, your message will reach more eyes and ears.

Estimate how many attendees you expect

- This is so you can get enough resources together to serve the needs of all protestors. Otherwise, you risk the protest fizzling out.

Hold rally in an area with high visibility or that is related to the issue

- If possible, make it an area that is both - for example, outside of city hall.

Announce the event on social media and alert the media

- The point of a protest is to be visible, to the point where you cannot be ignored. Greater attendance and more media coverage makes this possible.

Offer guidance for making signs and banners

- Objects like these are good to make your protest more memorable. However, they should be well-made and convey the right messages.

Put together a factsheet.

- It's a good idea to have factsheets about your issue available for anybody observing your event who might want more information or not have enough time to listen to speakers.

