

Effective Campaigning

As much as we'd like our advocacy campaigns to always go as planned, the reality is they generally don't. We often need to respond and adapt to factors beyond our control. This means that the campaign phases and planning tips below are just guides to help you think through some of the things you could do, knowing you may not do them all and may not always do them in order.

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FORMING

Identify the goal, why it's important, who might work with you and how you'll run the campaign...

- Before starting your planning, ensure everyone is clear about the goal. What is the problem? What are you trying to change?
- What are the steps or milestones that take you in the direction of your goal?
- Who is likely to support you?
- Who else has done work on the problem?
- How will you get the work done and ensure people stay in touch?

Action ideas

- Call a meeting of potential supporters to discuss the goal and seek their involvement.
 - Speak to those that have already acted on the issue to find out what they have done.
 - Form a steering group to lead the campaign. Start to consider how the group will work (e.g. roles and responsibilities, communication, decision making).
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RESEARCH

Gain a deeper understanding of the issue and the stakeholders and planning your communications and actions for maximum impact...

- Who are the decision makers that can give you what you want? What's their policy agenda? Who influences them?
- Identify your stakeholders -who in your local area is affected by the issue or will be affected if you achieve your goal? Are they potential allies or opponents?
- Who might work against you? What is the other side of the story and how can you win people over, or at least neutralise them?
- How can you best frame your issue for maximum impact and "buy in?"

Action ideas

- Talk to locals about their views on this issue. You could hold 1:1 meetings, attend existing local meetings or call a forum to explore the issue. Use the process to flush out supporters, real life stories that demonstrate the problem and potential media spokespeople.
- Find statistics relevant to the issue.
- Talk to local councillors and MPs to present the stats and ask their view on the issue.
- Hold a brainstorming session to identify all stakeholders and conduct a power analysis.
- Based on your power analysis, identify the most important stakeholders to focus on and how you can bring them on board, or neutralise their opposition.
- Hold a brainstorming session to consider your key communication messages. What are your key messages, how will you refute your opponents views and how can you best frame your issue?

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PUBLIC ACTION

Make the issue and your campaign visible, bring people on board publicly and grow your supporter base...

- What strategies and activities could you use to help achieve the advocacy goal?
- Will you use the media? What kinds? How will you ensure you use the media strategically to further your cause?
- Identify Strengths, Weaknesses, Opportunities and Threats (SWOT) to focus on what might work best:

Strengths: What does/can your group do particularly well or what do you possess of special value that will benefit the campaign?

Weaknesses: What is your group not particularly good at that may limit the project; where are your problem areas?

Opportunities: Are there any external factors that you may be able to take advantage of or use for leverage, or connect or associate with in any way that would enhance your campaign?

Threats: What threats is your group likely to face?

Action ideas

- Lobby your local politicians or decision makers (e.g. hold a street stall, or host an online petition to gather community support and present this to your decision maker).
- Hold a local forum and invite decision makers to hear how the issue affects local people. Consider inviting the media to cover the forum and bring attention to your issue.
- Consider a role for social media and what channel would best suit your issue.
- Write local position papers containing local stories – use this as a reason to secure a meeting with local decision makers.
- Develop a media release with a clear call for people to get behind your campaign and how they can do so.
- What else? Think outside the box!

MONITORING & EVALUATION

Monitor what is and isn't working and change tactics accordingly, keep records and decide when it's over...

- Is your strategy working?
- What's not working?
- Do you need to try something different?
- What support do you have?
- Have you reached some of the steps or milestones that you have set?
- Do you need to keep a watching brief to make sure gains are not eroded?
- What lessons have been learnt?
- Have there been any unintended benefits?
- Where to from here?

Action ideas

- Call a meeting to get feedback on how things are going.
- Write up a report on where the campaign is up to and send it out to supporters.
- Make sure you keep a record of what you have done.

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CAMPAIGNING TOOLS

Scoping Paper

Scoping paper – to be used when there is more than one idea for a campaign

The scoping paper is a tool that can be used when your network has multiple ideas for a campaign.

The first step is for members to pitch their ideas to the network. Members then vote on whether to give the campaign 'in principle' support. If granted, those who've proposed the campaign must then complete this template and present the findings to the group, including their recommended course of action. The group then decides whether to adopt the campaign. If so, the strategy development process begins.

To complete the scoping paper you will need to do some research to provide answers for the following:

- The problem and provide evidence
- The source of the problem
- The person/s who can fix the problem
- If there is a role for your network
- Other stakeholders

[Click here to open the Scoping Paper tool](#)

**Tool acknowledgement – Mark Ludbrooke, Cancer Council NSW*

Force field Analysis

Force field analysis – a process to identify the forces for and against what you are trying to achieve

A force field analysis helps to think about forces affecting the campaign including, but not limited to external groups, internal division, psychological powers and blocks. Through discussion with others, the force field analysis can help us tease out differences of perspectives within our group. It can thus produce a rich analysis of potential places of growth for the campaign.

Steps:

- Clearly identify the problem/campaign vision.
- What's working in your favour?
- What might work against you?
- Consider all contexts (political, economic, cultural, social)

Then answer the following questions:

- How will we acknowledge and/or deal with forces against?
- How will we leverage those things in our favour?

[Click here to open the Force field Analysis tool](#)

**Tool acknowledgement - George Lakey, Training for Change*

Theory of Change (ToC)

Theory of Change (ToC) – a tool useful for laying out the initial roadmap for strategy and action

A ToC not only helps a group to collectively develop their strategy and campaign, but also helps to challenge assumptions about what may and may not work in getting change. In the work we do strategy is about turning the resources we have into the power we need, to win the change we want.

To do this you need to answer four questions:

- What change do we want?
- Who has the resources to create that change?
- What do they want?
- What do we have that they want?

Once you work through the process you will be able to put together your organising statement:

We are organising (who) to do (what-goal) by (how- theory of change)

It is important to test your ToC by asking the following questions:

- Will the people affected feel power if they act on this theory?
- Is the action strong enough to plausibly create change?
- Does it make the most of your resources and build your network?

[Click here to open the Theory of Change tool](#)

Tool acknowledgements – Marshall Ganz – the New Organising Institute.

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