

Lesson 13: Creating a Strategy Chart

Goals/Purpose

Through this lesson the group will map out a strategy for winning their issue. Another way of saying it is that they will map out their campaign. This campaign roadmap will help them to decide what steps to take and when, and it will be a guide for the group as they move forward.

Objectives

- Youth will define and identify the targets, allies, constituents, opponents, tactics and goals of their campaign
- Youth will identify the resources they need to conduct their campaign
- Youth will identify the first steps in their campaign
- Youth will have a document that can be used as a guide throughout the campaign

Total Time: One and a half hours

Agenda/Activities

Introductions/Icebreaker
What is strategy?
Strategy Words
Strategy Chart Exercise
Closing



Facilitator Preparation

Make large poster of a blank strategy chart (see the Tools section of this lesson)

Materials Needed

Large newsprint
Markers
Masking Tape

Tools

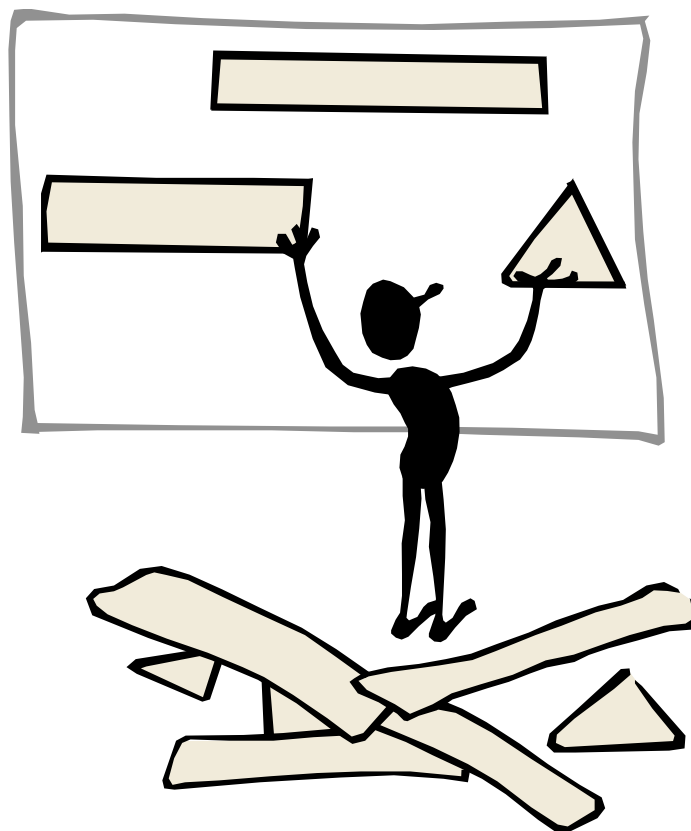
Strategy chart handouts

- strategy chart guide
- sample strategy chart
- blank strategy chart (to use as a template)

The Basics

The strategy chart is a roadmap for your group to win the issue it has selected to work on. It gives the overall design for building the power your group needs to win. It can be completed in one longer session or broken up and completed in smaller segments over a period of time. It is sometimes helpful to ask people who know about the community to help you fill it out since the group may not know enough about the community. For example, we invited two community outreach workers to meetings where we discussed parts of the strategy chart. The outreach workers are local residents with whom the youth could identify, and they were able to convey important information that the group lacked such as a complete list of potential allies. Minimally, it is important to involve the leaders and staff of your group in this exercise.

The strategy chart and its terms were developed by the Midwest Academy, a training organization in Chicago that has worked with hundreds of groups around the country to map out successful campaigns. Information about the Academy and its book, *Organizing for the 21st Century*, are listed in the back of this curriculum. We recommend buying this book and attending one of their training sessions.



Opponents People and/or organizations that are not on your side of an issue and who stand to lose something if you win your issue.

Example: The statewide grocers' association

Tactic The actions you take to pressure the target into making the decision you want them to make in order to win your issue. Tactics should be within the experience and comfort level of your group, and out of the experience of the target.

Examples: Young people testifying at City Council meetings, merchant education campaign, petitions, rally outside City Hall

Long-term goal This is the long term goal of your efforts. When working with youth, we frame this as something the group can accomplish in over one year.

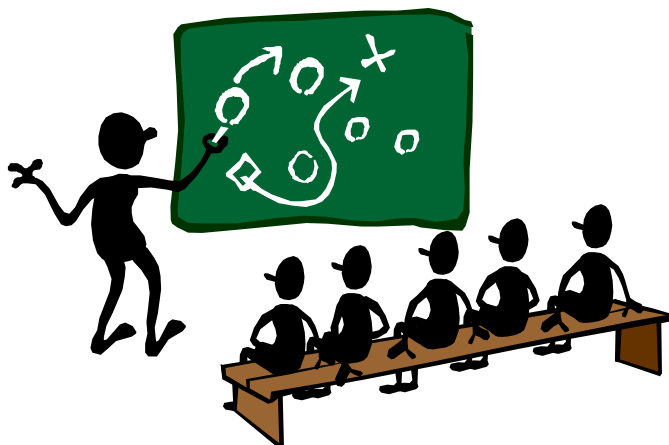
Example: Reduce youth smoking rates

Intermediate goal This is the goal of your campaign. You should choose something that can be accomplished during one school year (see lesson on picking an issue).

Example: Ban self-service displays of tobacco products

Short-term goal This is a first step that your group can take to get to your intermediate goal. It may be a quick victory that the group can win, or it may be something your group has to do before working on the intermediate goal.

Example: Conduct community walkaround of neighborhood stores & publish results



2. Filling Out the Strategy Chart

60 min

Materials: Poster sized strategy chart for the large group and strategy chart handouts for the small groups (see the Tools section of this lesson).



a. Step 1: Small group work

Divide the group into small groups of 5 – 8 participants. Give each member a blank strategy chart and a strategy chart that has the questions to be answered. Have each group fill out a part of the strategy chart to the best of their ability (for example, give one group the allies and constituents section, another group the tactics section, and so on). It is ok if they cannot fill it out entirely. They might need to do some homework to get more information for the chart.

b. Step 2: Large group work

Each group shares its portion of the chart. A scribe from each group fills in sections of the poster-sized chart as the spokesperson reports back. By the end of this large group session, you will have a giant strategy chart. At this point, everyone should look at what is known and what needs to be researched. Come up with a plan for filling the gaps, i.e. asking people in the community, doing a quick survey.

Once the strategy chart has been filled out, the group can discuss the first steps that need to be taken. These will flow from the group's short-term goal. At this point, the group is launching its campaign!

A note about resources

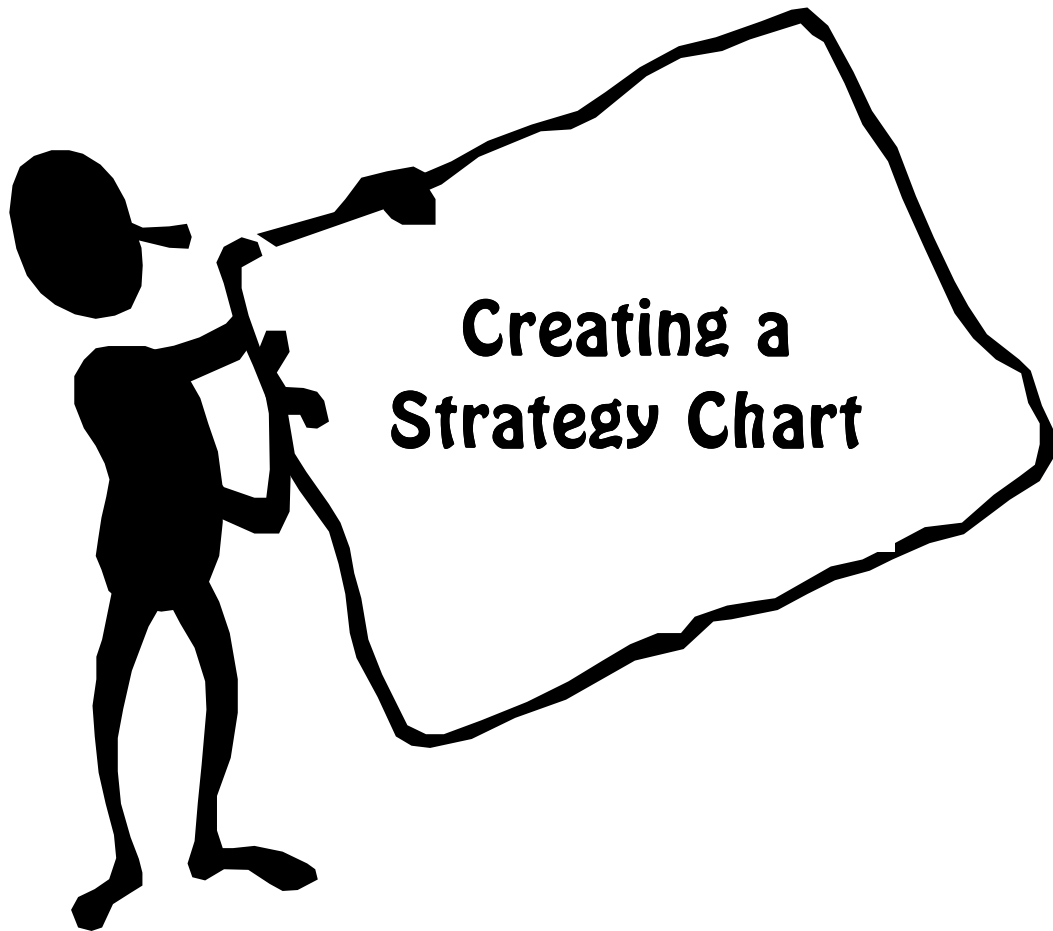
The strategy chart has a column where you can write down what resources you have and what you need to win your issue. It is important to take a serious look at this column so that you can plan to utilize what you have and get what you will need. It also has a place for you to write down what you want to get out of the campaign. This is a very important question to consider. It has to do with what your organization will get out of winning the issue, for example more members, more adult allies, more community support.

Tips

- Many people get confused and think that the strategy is the action you take, like a rally or a demonstration. In direct action community organizing, tactics are the actions you take.
- It is helpful to have people who are knowledgeable about the community fill out a strategy chart with your group. These people are in a good position to be able to identify targets and allies in the community.



Tools – Lesson 13



STRATEGY CHART GUIDE

Priority Issue:

GOALS	CONSTITUENTS, ALLIES&OPPONENTS	TARGET	TACTICS	RESOURCES
<p><u>Long-Term Goal:</u> What is your long term goal?</p>	<p><u>Constituents:</u> Who are the people - organized or not -on your side of the issue who share your self interest & will benefit if you win?</p>	<p><u>Primary Target:</u> Who has the power to give you what you want? What power do you have over them?</p>	<p>What are the steps you can take to influence your target?</p>	<p><u>What We Want to Get Out of This:</u> What organizational gains do we want from this campaign (more people, more leaders, other?)</p>
<p><u>Intermediate Goal:</u> What you are seeking to achieve in this campaign</p>	<p><u>Allies:</u> Who are the people and organizations who can align with your issue for reasons that may differ from your own?</p>	<p><u>Secondary Target:</u> Who has the power to influence your primary target? What power do you have over them?</p>	<p>Partial List of Tactics: Community walk-around Media advocacy Community presentations Letter writing campaigns</p>	<p><u>What We Need:</u> What resources, people, money, info, other do you have to carry out the campaign? What problems do we need to solve to move forward?</p>
<p><u>Short-Term Goal:</u> Short term victories on your way to the intermediate goal.</p>	<p><u>Opponents:</u> Who are the people and organizations who oppose you and who will lose if you win? What will they do to oppose you? How strong are they?</p>		<p>Speaking/Performing at public hearings Meetings with elected officials Postcard/letter campaigns Rallies, pickets, letters to the editor.</p>	<p><u>What We Have:</u> What resources, people, money, info, other do you have to carry out the campaign?</p>

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Adapted from Bob, Kim et al. *Organizing for Social Change*. Seven Locks Press. 2001.

SAMPLE TIGHT STRATEGY CHART

Priority Issue: Eliminate Self Service Displays (SSDs)

GOALS	CONSTITUENTS, ALLIES&OPPONENTS	TARGET	TACTICS	RESOURCES
<p><u>Long-Term Goal:</u> Promote a local ordinance that bans self services displays of ALL tobacco products</p>	<p><u>Constituents:</u> Other youth, parents, community groups, local anti-tobacco coalition</p>	<p><u>Primary Target:</u> City Council Board of Supervisors</p>	<p>organize community map tobacco displays document the problem community presentations petitions letters to the editor</p>	<p><u>What We Have:</u> youth power community support media access determination commitment</p>
<p><u>Intermediate Goal:</u> Raise community awareness re: youth buy rate and the large number of SSDs of cigarettes, cigars & chew.</p>	<p><u>Allies:</u> Neighborhood Associations, American Lung Association, American Cancer Society, Police department</p>	<p><u>Secondary Target:</u> Merchants Police Chief</p>	<p>educate elected officials pickets media advocacy press conference speak at public hearings letter-writing campaign youth purchase surveys</p>	<p><u>What We Need:</u> more community partners local maps w/ parks & schls cameras & film help from adults regular meeting location food</p>
<p><u>Short-Term Goal:</u> Map all the self services displays near schools, parks, and playgrounds.</p>	<p><u>Opponents:</u> California Grocers Association, Tobacco Industry, Merchants</p>			<p>project supplies school administration support transportation list of community orgs training</p>

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STRATEGY CHART

Priority Issue:

GOALS	CONSTITUENTS, ALLIES&OPPONENTS	TARGET	TACTICS	RESOURCES
<u>Long-Term Goal:</u>	<u>Constituents:</u>	<u>Primary Target:</u>		<u>What We Want to Get Out of This:</u>
<u>Intermediate Goal:</u>	<u>Allies:</u>	<u>Secondary Target:</u>		<u>What We Need:</u>
<u>Short-Term Goal:</u>	<u>Opponents:</u>			<u>What We Have:</u>