

Module 1: Planning

Module background

During the introductory session, participants were given an opportunity to analyse in more depth the issues that make up their area of interest. This session is an opportunity to build upon this initial analysis to start to put together a well thought out and structured plan for their campaign.

After the introductory session some participants will be very clear what their goal is whilst others may still be less certain. At whatever stage the participants are at it is important that they have the opportunity to further refine their analysis and to start to experiment with tools that allow them to prioritise and plan effectively.

Aim of the module

By the end of the session participants should:

- Understand what the different parts of a campaign strategy are.
- Have either identified or moved towards identifying what their campaign goal is.



Total time for the module: 1 hour 45 to 2 hours, (including a 15 min break)

Activity 1 Introduction

5 mins

How to do it?

Explain to participants the structure of this session. We will ask you to build on your work from the introductory session to think some more about your campaign ideas and to prioritise these. We will then start thinking about how an effective campaign strategy can be structured so that our resources are used effectively to achieve our goal. Many campaigns often fail because people rush to take exciting campaign actions like organising highly visual and exciting stunts or meeting with politicians. These actions will be much more effective if in advance, time has been spent thinking about (and being very clear about) what exactly it is we want to achieve, who our targets are and which appropriate actions we feel confident to undertake.

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<h3>Activity 2: What should we do? (Campaign ideas prioritisation matrix)</h3>	<p>45 mins</p>
<h4>Aim of the session</h4> <p>By the end of the session participants should:</p> <ul style="list-style-type: none"> • have agreed what campaign issue they want to focus on or have decided what else they need to find out before deciding. 	
<h4>How to do it?</h4> <p>Whole group activity:</p> <ol style="list-style-type: none"> Ask participants to reflect upon the work that they did in the introductory session (displayed on the walls). Ask participants to explain in one sentence one thing that struck them from the problem tree analysis (5 mins) In pairs participants are asked to write on large post it notes (or A6 pieces of paper) ideas for what the group should be trying to achieve. One idea is written on one piece of paper and should be written in such a way that others in the group should be able to understand what is meant by it (10 mins). The pairs come back together as one large group. Laid out on the floor is a large grid consisting of a large cross with the following labels at each of the four ends; easy to do, hard to do, big impact, small impact. Each pair takes it in turn to read out one of their ideas and place it onto the matrix according to how easy or difficult they think the idea is to do and how big or small an impact it would have. As each paper is laid on to the chart, with the group's agreement, duplicates are removed and an attempt at a consensus is made as to where each paper should sit on the chart (20 mins). The group is encouraged to draw some conclusions from the activity. some questions to help this might include (10 mins) <ol style="list-style-type: none"> Is it now clear what the group's main priority should be? Does it make sense to focus on the campaign idea/s that are in or are closest to the quarter of the matrix that is easy to do / high impact? 	

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| <ul style="list-style-type: none">c. we have looked at impact and how easy an issue is to work on in thinking about which issue we should prioritise. Are there other criteria we need to think about before deciding which issue we should work on? (e.g. how passionate we are on the issue?)d. do we need to find some more things out before we decide which issue to focus on, if yes what are they (and who will do it)? | |
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Trainer tips

Note: some groups may struggle to figure out what may be difficult/easy to do, it may then be necessary for the trainer to input from their own experience to help them draw some conclusions.

What stuff do I need?

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| <ul style="list-style-type: none">● The flip charts from the activities in the introductory session (e.g. problem tree)● large post it notes or A6 pieces of paper● flip chart● marker pens | |
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<h2>Activity 3: What is a strategy? (introduction)</h2>	<p>5 mins</p>
<p>How to do it?</p> <p>Having completed today’s activities and those from the introductory session we should now be clear (or clearer) on what it is the group wants to achieve. We now need to start working on a plan that allows us to move towards achieving this, but we need to be clear how our ideas can best be put together into a plan. This activity should help us to be clear what the different elements of a plan can be.</p> <p><i>Strategy is ‘how to turn what you have’ into ‘what you need’ to get ‘what you want’ (Marshall Ganz)</i></p> <p>There is much confusion about the difference between aims, objectives, goals, strategies and plans. This session will help you to be clear what your campaign plan is. (At this point it may be worth introducing the Campaign Planner and showing visually the progression from Campaign Goal to tactic)</p>	
<p>What stuff do I need?</p> <p>Resource sheet - ‘Campaign Planner’</p>	

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<h2>Activity 4 What is a strategy?</h2>	
<p>There are a number of activities that we could use to try and achieve the aim of this session. After having facilitated the introductory session (including the problem tree) it may now be easier to decide which of the following activity options may be most suitable for trying to achieve the aim of our session</p>	
<h2>What is a strategy? Option 1: Personal experiences</h2>	<p>35 mins</p>
<h3>Aim of the session</h3> <p>By the end of the session participants should:</p> <ul style="list-style-type: none"> • have a shared understanding of the difference between goal, objective and tactic 	
<h3>How to do it?</h3> <ol style="list-style-type: none"> 1. One or two pieces of flip chart (depending on the number of people taking part) are hung on the wall or placed on the floor (so all can see). The flip chart is divided into thirds (horizontally). The following headings are written on half pieces of A4: <ul style="list-style-type: none"> • Goal: the change we want to see • Objective: the specific things we will do to try and achieve the goal • Tactics: the things we will do to try and influence the target 2. These headings are turned over (so they can't be read) and placed in order at the top of each third of the flipchart. 3. Ask people on their own to think about a time in their lives when they have taken a number of steps to try and change something in their lives. Write what it was that you aimed to achieve (the big thing – the big change you want to see) on one post it and then write on a couple of other post-its the steps you took to try to get there. 4. Offer a personal example and write these on post its for the group to see (for example: 1) the big change I wanted to see was to 'have less arguments with my teenage son'. The steps I took to try to get there were 2) 'stop him using a new towel each time he has a shower and then leaving it on his bedroom floor' and how I thought I would achieve that was by 3) 'not picking up his towels but leaving them there so that he has no 	

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<p>fresh towels to use'. The post it with number 1 is placed in the top third of the flipchart, number 2 in the middle and so on. (5 mins)</p> <ol style="list-style-type: none"> 5. If there is still confusion about the type of example that people can use it may help to offer them the following: these can be big things that have had a great influence on your life or small things that have had a small impact. They could be things you tried to do in your neighbourhood, on your street, in your family in your workplace etc. 6. Participants work on their own to write the post its and then to stick them onto the flipchart (ideally a different colour for each person) (5 mins) 7. Once all the post its have been added to the flipchart, turn over the headings to reveal what is written (i.e. goal, objective, tactic) and work through the personal example you have given explaining how each of the post its is an example of what is written on the heading. Discussion. (10 mins) 8. Invite participants to work in threes, thinking of a campaign they know about or admire. If they can't think of a campaign invite them to look one up on their mobile phones or alternatively use one of the Campaign Example Resource Sheets. 9. Ask them to write the different elements of the campaign on pieces of paper (each three has a unique colour) using marker pens and stick them on the walls under the headings. (10 mins) 10. Tour the walls tracing the different elements of the chosen campaigns. Discussion takes place at the wall. Stress importance of having a clear campaign goal. (5 mins) 11. The group can reflect on their learning by looking at the Resource sheet: Campaign Strategy: an introduction 	
<p>Trainer tips</p> <p><i>One American trainer describes strategy as follows: 'We can think about campaign strategy in terms of a staircase. If objectives are the individual stairs, a tactic is something we use to move from step to step. Our campaign strategy is like the whole staircase; it's a long-term plan of how each objective fits into a plan of how we'll achieve our ultimate (goal)'. Nadine Bloch</i></p>	
<p>What stuff do I need?</p> <ul style="list-style-type: none"> ● 1 sheet flipchart divided into thirds (horizontally). ● The following headings are written on half pieces of A4: <ul style="list-style-type: none"> ○ Goal: the change we want to see ○ Objective: the specific things we will do to try and achieve the goal ○ Tactics: the things we will do to try and influence the target 	

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- blu tack
- Post it notes (ideally as many different colours as there are people)

Resource Sheet: Campaign strategy: an introduction

Resource sheet: Campaign Example: Justice for LSE Cleaners

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<h2>Activity 4 What is a strategy? Option 2: the blanket game</h2>	<p>40 mins</p>
<h3>Aim of the session</h3> <p>By the end of the session participants should:</p> <ul style="list-style-type: none"> • have a shared understanding of the difference between goal, objective and tactic 	
<h3>How to do it?</h3> <p>This activity is best run with groups of between five and eight people. Each group does the following:</p> <ol style="list-style-type: none"> 1. Everyone to stand on a large blanket. Ask them to flip the blanket onto the other side, without anyone stepping onto the floor. (check if people are comfortable being close to each other etc and if appropriate wheelchair accessibility). (It is possible to assign one person the role of observer) (5 mins) 2. Split into small groups (from within the same groups). Think about what steps were followed in order to get to a fully flipped over blanket. What happened? Ask participants to write onto post it notes a step-by-step process to explain what happened. (if an observer has been assigned they can also be involved in the feedback discussion) (5 mins) 3. Put up three headings on the wall - GOAL, OBJECTIVES, TACTICS Put up the goal (which was the same for everybody) on a post it under “GOAL”. Explain the difference between objectives and tactics, i.e. Objective: the specific things we will do to try and help achieve the goal, Tactics: the things the group did to try and achieve the objectives. Ask people to put their post-its under the relevant headings. (10 mins) 4. Invite participants to work in threes, thinking of a campaign they know about or admire. If they can’t think of a campaign invite them to look one up on mobile phones or alternatively use one of the Campaign Example Resource Sheets. (5 mins) 5. Offer the group the following definitions: Goal: the change we want to see in the world as a result of our campaign. Objective: the specific things we will do to try and help achieve the goal, Tactics: the things we will do to try and influence the target of our campaign. Ask them to write the different elements of the 	

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campaign on pieces of paper (each three has a unique colour) using marker pens and stick them on the walls under the headings. (10 mins)

6. Tour the walls tracing the different elements of the chosen campaigns. Discussion takes place at the wall. Stress importance of having a clear campaign goal. (5 mins)

7. The group can reflect on their learning by looking at the Resource sheet: Campaign Strategy: an introduction

Trainer tips

Note: Oxfam Canada suggest running the blanket game twice so that the second time participants think actively about which category their actions fall under.

What stuff do I need?

- blankets of various sizes,
- Post its,
- Blu tack,
- Marker pens x 5
- 'GOAL', 'OBJECTIVES', 'TACTICS' headings on A4 pieces of paper

Resource sheet: [Campaign Example: Justice for LSE Cleaners](#)

Resource Sheet: [Campaign strategy: an introduction](#)

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<h2>Activity 4: What is a strategy? Option 3: Marshmallow tower</h2>	<p>50 mins</p>
<h3>Aim of the session</h3> <p>By the end of the session participants should:</p> <ul style="list-style-type: none"> • have a shared understanding of the difference between goal, objective and tactic 	
<h3>How to do it?</h3> <ol style="list-style-type: none"> 1. Divide everybody up (ideally) into groups of four people 2. Give each team the following: 20 sticks of spaghetti, 1 roll of masking tape, 1 metre of string, and 1 marshmallow (note: Halal marshmallows are available). 3. Tell everybody that using these resources, each team must try to construct the tallest tower. Each structure should have a Marshmallow on top and be able to stand on its own for five seconds (15 mins). 4. Split into small groups (from within the same groups). Think about what steps were followed in order to get to construct the tower. What happened? Ask participants to write onto post it notes a step-by-step process to explain what happened. (5 mins) 5. Complete the steps from the previous activity (option 2) starting at point number 3. 6. The group can reflect on their learning by looking at the Resource sheet: Campaign Strategy: an introduction 	
<h3>Trainer tips</h3> <p><i>Note: There are more resources for this module in the ‘Extra resources for trainers - Planning /Strategy’ doc</i></p>	
<h3>What stuff do I need?</h3> <ul style="list-style-type: none"> • Each team of four people needs: 20 sticks of spaghetti, 1 roll of masking tape, 1 metre of string, and 1 marshmallow (note: Halal marshmallows are available). • ‘GOAL’, OBJECTIVES, ‘TACTICS’ headings written on half pieces of A4 and stuck on a flip chart <p>Resource Sheet: Campaign strategy: an introduction</p>	

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Activity 5	15 mins
How to do it? Participants return to the matrix diagram and are encouraged to think about and agree what may be their GOAL and what might be one (or more) of their OBJECTIVES.	