

# Planning Your Approach



If you're planning to drive to a distant location you've never been to before, you probably load the destination into a map app, figure out how long it will take you to get there, when you should leave, where you might stop to eat or spend a night, and where to stay when you get there. Just before hitting the road, you might look at traffic on your route to see if there are any accidents or road construction that you should avoid.

Planning your approach to your advocacy campaign is similar. You need to figure out what a successful campaign will look like, what steps to take to get there, what resources you have or will need, what obstacles and opposition you might run into along the way, and what other groups might be able to help. All of these things make up your advocacy campaign strategy—the map of your advocacy campaign.

One of the best tools to map out your campaign strategy is the strategy chart (located at the end of this document). A strategy chart consists of five columns:

- Goals
- Organizational Considerations
- Constituents, Allies, and Opponents
- Targets (Decision Makers)
- Tactics

Remember, a strategy is your overall plan, while tactics are the steps you take to achieve that plan's goals.

## Goals

Your goals are what you want your advocacy campaign to achieve, as well as the steps along the way. Goal setting is covered in more detail in the *Setting Goals* document in the toolkit.

## Organizational Considerations

Your organizational considerations are the resources your PTA can bring to the campaign or will need to develop and the obstacles or challenges your PTA may face. Resources can include:

- People: Who will do the work? How much effort is needed for each step?
- Time: How long will each step take? How big a time commitment are we asking from our team for each task?
- Materials: What do we need to write or produce? Do we need signs or other publicity items? What data do we need to collect?
- Skills: Do we have the ability to do everything? What don't we know how to do (yet)?
- Finances: How much will materials cost? Do we need to pay for any outside help?

Also included in organizational considerations are what your PTA stands to gain through your advocacy. That could be things like a bigger pool of PTA leaders, more experienced PTA leaders, more engaged PTA members, new PTA members, and new skills within your PTA.

Remember that organizational considerations also consider internal problems you may face, such as the skills needed to accomplish a task or simply the number of people needed to go knock on doors and talk to the community. Note that these obstacles are within your PTA, not those other organizations or community members who may oppose your goals.

### **Constituents, Allies, and Opponents**

Constituents are the people who will be affected by the change you are advocating for. They may be students at your school, their families, or your community members. Your constituents may be willing to join your advocacy efforts. Some questions to consider about your constituents are:

- What will they gain if we are successful?
- What are the risks they may face (e.g., a food program to help homeless children at your school may lead to bullying or identifying undocumented families)?

Allies are those people and organizations outside your PTA who are already involved in advocacy on your issue or who may be persuaded to join your efforts. Remember that in any advocacy coalition, the IRS requires that PTA funds go only to the PTA's advocacy efforts. The two questions regarding constituents also apply to your allies, as well as identifying what power they may have over your targets.

Opponents are those who will push back against your advocacy efforts. When identifying your opponents, here are some questions to consider:

- What will our success cost them?
- What will they do or spend to oppose us?
- How strong are they?
- What resources do they have?
- What power do they have over our targets?

### **Targets (Decision Makers)**

A target is always a person; never an institution or an elected body. You can have more than one target, but each one needs a separate strategy chart since relationships and power will differ with each target.

Primary targets are those people who can directly give you what your advocacy campaign is asking for. For example, with a school policy issue, your primary targets would be each member of the school board. You would list each one of them separately, because your PTA's relationship with each is likely different. One board member might be a neighbor of a PTA member, while another may have a child in your school, a third might be a coworker of a PTA member, and a fourth might have no relationship with anyone at your school or in your PTA. For each, your approach will be different based on the relationships you have.

Secondary targets do not have the ability to directly make the change you wish to see, but have influence or power over your primary targets. You do not always have or need secondary targets in your

advocacy campaign. In our school policy issue above, secondary targets might be the superintendent or building principals, who don't have power over school board members but certainly have influential voices with the school board. Voters could also be a secondary target (keeping in mind that PTAs cannot endorse specific candidates).

### **Tactics**

Tactics are the actions you are going to take to implement your advocacy strategy. They are the steps you are going to take to persuade each of your primary targets to take the action you want to implement the changes you desire. Each tactic should be directed at a specific target, backed with a form of power (e.g., "I am a voter in your district"), and make sense to your members. Some examples of advocacy tactics are:

- Letter/e-mail campaigns
- Phone campaigns
- Social media campaigns
- Letters to the Editor and Op-Ed pieces
- Meetings with decision makers
- Media events
- Press releases
- Public hearings
- Non-partisan voter registration and education campaigns
- Non-partisan candidate forums
- Non-partisan Get Out the Vote
- Lawsuits

## Advocacy Strategy Chart

<b>GOALS</b> <i>What do you want to achieve?</i>	<b>ORGANIZATIONAL CONSIDERATIONS</b> <i>Resources, skills, gains &amp; needs</i>	<b>CONSTITUENTS, ALLIES &amp; OPPONENTS</b> <i>Who in PTA cares? Outside organizations? Who will fight you?</i>	<b>TARGETS</b> <i>Who can make the change you want? Who can influence them? Always a person.</i>	<b>TACTICS</b> <i>Applied to your targets to get them to make decisions that will allow you to reach your goal.</i>

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