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# Strategy Charts & Power Maps: A User Guide

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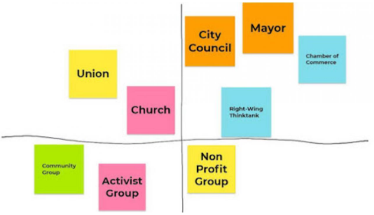

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## Why Do Campaign Strategic Planning?

If your group is brainstorming a campaign to change a public policy or to stop a harmful corporate action, it can often seem overwhelming. Where do you start? For example, a community group wants to stop the development of a luxury condo and have affordable housing instead. Another organization wants to shift funding away from the police budget to social services. Or a coalition wants the state to increase its renewable energy goals. So many factors are involved. What do we do and in what order? Who are our allies and opponents? Who are the decision makers we have to push? How can we win, and how long will it take?

Campaign strategic planning will help answer these questions. Strategic planning forces a group to take the time to think through the campaign, rather than just launch into activities that group members are familiar with. For instance, without going through a strategy process, a group might decide that they should go hand out flyers about their issue. Maybe they should, but tactics should support strategies, which should support goals. Jumping right to familiar tactics may lead the group to waste time and energy or miss other actions that would be more useful to the campaign. Campaigns can be lost or fizzle out if they are run in an improvised manner and are insufficiently planned. If a campaign might take a year, then it's worth taking a week to carefully think through the strategy and revisit the plan regularly.

Here I move through a process for strategic planning using a series of tools. This list is by no means exhaustive, but includes the strategy guides I've used or heard about. I'll briefly mention some others along the way. I rely mostly on the general framework of the Midwest Academy, some of the tools collected by Beautiful Trouble, and ideas of power and organizing from labor strategist Jane McAlevey.

## Some Key Terms

Because words like "strategy" are thrown around in these kinds of discussions, and they often mean different things to people, I'll try to be clear about how I'm using them here.

- Goals — the objectives of the campaign, the solution to an Issue
- Issue — the problem to be solved
- Campaign — the set of Strategies to achieve the Goal
- Strategies — plans designed to build Power to move a Target
- Tactics — a set of actions designed to implement a Strategy
- Power — the ability to get what you want from a Target
- Constituents — groups or people who would directly benefit from a Campaign win
- Allies — groups or people who support your Goals
- Opponents — groups or people who oppose your Goals
- Targets — people who can make your Goals happen

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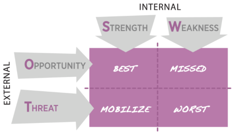
# Strategic Planning

Here are several frameworks that groups can use to determine their campaign goals and strategies.

## SWOT **Analysis**



This is the classic Strength, Weaknesses, Opportunities, and Threats matrix — SWOT. Often used in the business world, this can also be a useful exercise to help groups clarify their campaign goals — what issues they can win.

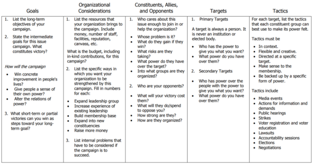
The group identifies its own internal strengths and weaknesses while also listing what external threats and opportunities they face. The diagram shown here goes further by looking at what campaign ideas can be generated at the intersection of these categories.

So in this case, all the strengths, weaknesses, opportunities and threats would be listed in the areas where the arrows are. Where these intersect on the chart, you can identify what Beautiful Trouble calls “Best Case,” “Missed Opportunity,” “Mobilization Scenario,” and “Worst Case” campaign options.

From this, the group can identify what issue it is well positioned to possibly win — those that fall in the Best Case box. For example, a Best Case scenario could be when a neighborhood group that’s very active and well known in the area (strength) sees widespread interest in doing something about a large vacant lot that’s been sitting there for years (opportunity). This leads them to take on a campaign to create a community park.

They can then move to the strategy chart to fill in details about the campaign.

## Strategy Chart



| Goals | Organizational Considerations | Constituents, Allies, and Opponents | Targets | Tactics |
|---|---|---|---|---|
| 1. List the long-term objectives of your campaign.<br>2. State the intermediate goals for this issue campaign. What constitutes victory?<br>*How will the campaign*<br>• Win concrete improvement in people's lives?<br>• Give people a sense of their own power?<br>• Alter the relations of power?<br>3. What short-term or partial victories can you win as steps toward your long-term goal? | 1. List the resources that your organization brings to the campaign. Include money, number of staff, facilities, reputation, canvass, etc.<br>What is the budget, including in-kind contributions, for this campaign?<br>2. List the specific ways in which you want your organization to be strengthened by this campaign. Fill in numbers for each:<br>• Expand leadership group<br>• Increase experience of existing leadership<br>• Build membership base<br>• Expand into new constituencies<br>• Raise more money<br>3. List internal problems that have to be considered if the campaign is to succeed. | 1. Who cares about this issue enough to join in or help the organization?<br>• Whose problem is it?<br>• What do they gain if they win?<br>• What risks are they taking?<br>• What power do they have over the target?<br>• Into what groups are they organized?<br>2. Who are your opponents?<br>• What will your victory cost them?<br>• What will they do/spend to oppose you?<br>• How strong are they?<br>• How are they organized? | 1. Primary Targets<br>A target is always a person. It is never an institution or elected body.<br>• Who has the power to give you what you want?<br>• What power do you have over them?<br>2. Secondary Targets<br>• Who has power over the people with the power to give you what you want?<br>• What power do you have over them? | For each target, list the tactics that each constituent group can best use to make its power felt.<br>Tactics must be<br>• In context.<br>• Flexible and creative.<br>• Directed at a specific target.<br>• Make sense to the membership.<br>• Be backed up by a specific form of power.<br>Tactics include<br>• Media events<br>• Actions for information and demands<br>• Public hearings<br>• Strikes<br>• Voter registration and voter education<br>• Lawsuits<br>• Accountability sessions<br>• Elections<br>• Negotiations |

This is the well-known strategy chart from Midwest Academy, a progressive training institute that has worked with activists for 50 years. What I like about this chart is it requires that the group to think carefully about its goals, what resources it brings to the campaign, its constituents, allies and opponents, its campaign targets, and tactics for every target.

For Midwest Academy, all goals should be something concrete that can be won from a target, and they should deal with a specific solution to a problem that the group is trying to fix. This should be something that the group really wants, not a “realistic compromise.”

In this framework, each target is a person who can make a decision to give you what you want and needs a separate strategy to move them. In its Organizing for Social Change guide, Midwest Academy says that a strategy is “a method of gaining enough power to make a government or corporate official do something in the public’s interest that he or she does not otherwise wish to do.” Thus strategies must always involve building power to get a target to do something.

All the tactics should support that strategy,and we shouldn’t use tactics over and over again if they aren’t working just because we like them. There are a few tools related to tactics that might be useful. The Action Star asks us to carefully think through our actions, which are the tactics we deploy. Furthermore, each action works at a specific Point of Intervention, interrupting the functioning of the system.

It's also important to have small wins on the way to the main goal in order to build the confidence, energy, and support of the campaign. This is related to the theory of campaign escalation. If a campaign continuously does the same thing month after month, it may fizzle out as people drop away. We want an escalation of activity and power over time.

Other exercises examine targets. A tool for target identification is the Pillars of Power, where you identify the key institutions or relationships that your main target depends upon. You may want to develop a strategy for some or all of these. The Peel the Onion tool helps better understand targets through identifying their wants and needs.

At the end of the chart process, the group makes a campaign timeline, which is a living document that includes a specific and concrete list of items: WHO will do WHAT by WHEN. The more specific the assignments, the better. Something like a Gantt Chart can be useful to map out all campaign elements on a timeline.

SMART **Objectives**

SPECIFIC
MEASURABLE
ACHIEVABLE
RELEVANT
TIME-BOUND

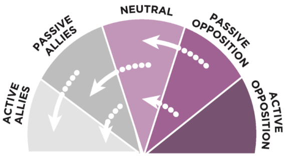
The SMART Objectives framework can be helpful for correctly outlining the key strategies for the campaign. There are various versions where the letters stand for slightly different concepts. Each objective should be:

- Specific — A simple and exact definition of what you want to happen
- Measurable — What information are we tracking to know if we are succeeding?
- Achievable — We should choose strategies that we can actually accomplish.
- Relevant — Does this really help the group get to its goal?
- Time-Bound — Set appropriate deadlines to keep the campaign moving.

## Power Analysis

These are tools that help groups assess the landscape of support and opposition in their campaigns and are useful to fill out the Constituents, Allies & Opponents part of the strategy chart.

Spectrum of Allies



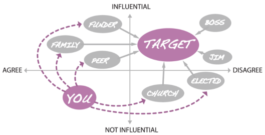
In this framework, you identify important groups or people that support, are neutral, or oppose your goal and display them visually on a spectrum, from left to right.

To win, it may be necessary to move some of the groups toward the more supportive side of the spectrum. Moving passive allies to active allies could be key for winning the campaign. Moving passive opponents to neutral could be helpful. The campaign can develop strategies and tactics to accomplish that.

An important insight about active opponents is that we list them not because we want to convince them to support our campaign, since they probably never will.

Instead, we should consider what they might do to oppose our campaign so that we can figure out how we would respond. Also active opponents generally aren't targets, because they can't give us what we want. So spending a lot of time on them diverts energy from the campaign.

Power Maps



This goes into more detail about allies and opponents. You map both groups in a way that shows how influential they are. Use a two dimensional grid with the horizontal axis a similar Agree/Disagree as the Spectrum of Allies. The vertical axis is the Degree of Influence, with more powerful on the top and less powerful on the bottom.

This requires some honesty about the level of power for groups, especially allies. We should assess them for how they are, not how we want them to be. You can also connect the groups with arrows showing who can influence whom.

The level of influence axis can be useful to inform strategy. It may be good for the campaign to move a powerful neutral toward support since we want to use their power in our coalition. It may be less useful to deploy in certain ways a solid supportive group that has no power.

## What About Worker Organizing Campaigns?

Worker organizing, whether to improve conditions at work or to form an officially recognized union and negotiate a contract, can fit into this overall framework.

In this case, the campaign could be conceptually simple since there is often one obvious target — the boss. The workers need a strategy to move the boss to agree to their demands. This strategy can involve a series of escalating job actions that organize more coworkers to increase their collective power and could eventually include a strike.

In more complicated versions, we may also need to bring pressure on the boss in other ways, especially if they engage in union-busting activities. A broader "corporate campaign" often identifies other targets that have key business relationships with the employer. This is not a substitute for worker action but should be used alongside it.

A common framework in the labor movement is to ask and answer these four questions:

- How does the employer make money?
- How does the employer want to grow in the future?
- Who are the decision makers?
- What are the important business relationships?

The strategy and tactics should try to disrupt the ability of the employer to make money or grow the business, and sever or complicate their important business relationships. A classic and successful example of a corporate campaign would be the United Farm Workers national grape boycott. It reduced grape sales and disrupted the grape growers' relationships with grocery stores significantly. The campaign put enough pressure on the growers to lead to union recognition and a contract. This is perhaps a rare example of a boycott that worked because the UFW put tremendous resources into it and attracted significant solidarity and support nationwide.

The Labor Notes Secrets of a Successful Organizer and TroubleMaker's Handbook are great resources for labor organizing campaigns.

## Campaigns Must Build the Power of Disruption

What I like about this overall framework is that it's hard-headed and realistic about building power and winning. It correctly assumes that we live in an unjust world that primarily serves the interests of wealthy and powerful people. The vast majority of people only get what they can successfully fight for, usually through social movements.

Winning our campaigns requires more than asking nicely and "speaking truth to power." It's not enough to just "fight the good fight" and not adequate to just have a rally because "we need to do something." Our goal shouldn't be just "educating the public" or "changing the conversation." We won't win just because we think we are right. We won't win just because we have been running a campaign for years and think we deserve to win.

Moreover, campaigns are not simply about the specific solution to a problem; they should also be about building people's power for the next fight. For Midwest Academy, campaign goals should fit three major criteria: (1) win real improvements in people's lives, (2) give people a sense of their own power, and (3) alter the relations of power. A campaign that builds power sets the group up for the next campaign in a stronger position. As Midwest Academy's Organizing for Social Change reminds us, "an organization should come out of any campaign stronger than when it went in, even if it loses the issue."

So we want to win actual victories, which requires building power. But what exactly is this power? And how much is enough? Our power requires organizing people to disrupt normal business as usual to pressure decision makers to do something we want. When the pressure we apply is greater than the reluctance of the decision makers, then they will move. Political Scientist Francis Fox Piven has long written about the dynamic of social movement disruption leading to reforms — that "if a movement succeeds in building a constituency, communicating its issues, and creating sufficient disruption to be a threat, it will create a dynamic in the legislature where politicians start to respond to the movement in order to bring things back to normal." Moreover, this disruptive power means going beyond rallies and other symbolic demonstrations. Rallies by themselves aren't disruptive — they may express anger and signal the potential for disruption — but if all we do is rallies, we won't win because we haven't disrupted business as usual.

Labor strategist Jane McAlevey, in her book No Shortcuts, makes this more concrete with the theory of concession costs and disruption costs. Concession costs are how much it will cost the target to give you what you want. Disruption costs are how much pressure a campaign can create, and this needs to be of the same magnitude as the concession costs. McAlevey fills in what I think is missing from the Midwest Academy framework, which is the question about how much disruption will be required. She argues, "Movement actors can and must reasonably predict the concession costs in advance; otherwise, they enter the fight without knowing which strategies to deploy." This is why a campaign with only rallies rarely works. We are bringing low disruption costs that do not meet the higher concession costs.

So how do we disrupt for real? For an employer, a union disrupting their business through a strike or boycott could be effective. For a landlord, a tenants' union disrupting rent payments could work. In both cases we are disrupting by cutting off the money. These are conceptually easy cases because both involve what McAlevey calls bounded constituencies. This is a group of folks directly subject to an authority figure, but who have potential power over that person if they organize and act collectively.

This gets somewhat more complicated in community organizing. A community could also be considered a bounded constituency that could build potential power over a local decision maker. Often a community group identifies the need for more public funding for something or a change in the law. Thus the group often targets elected officials who have decision-making power over these issues. The disruption in this case could become disrupting the careers of uncooperative elected officials by the threat that they will be voted out. Or it could be disrupting the normal life of the community in order to create a crisis to which elected officials must respond.

So in the example of the vacant lot, local groups could try to pressure the mayor or city council to create a community park. Or they could attempt to occupy the lot, build the park themselves, and then defend it from being seized. They have created a crisis that could be solved through legalizing the park. Likely both electoral and non-electoral strategies will be necessary.

McAlevey cautions that campaigns often really do mobilizing rather than actual organizing. These words are often conflated but there is a crucial distinction. For McAlevey, mobilizing involves gathering up activists and organization leaders who are already interested in the issue. These are folks who will more naturally turn out for events, and it's tempting for campaigns to rely on them alone. But real power is built through organizing, when we talk with, recruit, and train large numbers of new people who may never describe themselves as activists. Especially important are those people who are unacknowledged, respected leaders without official positions or titles who have influence and relationships with others.

## Do These Tools Work in the Real World?

Most organizers and campaigners I have talked with use some version or combination of these ideas, but rarely do they work through everything outlined here. I don't think I ever have on any campaign I've worked on. That's certainly ok, since the main purpose of these exercises is really to get groups to ask these questions and think carefully about their strategies. And most importantly, we have to ask ourselves, are we building enough power to create enough disruption?

Moreover, these frameworks are necessarily simplified reflections of what actually happens in the real world. For example, the Power Mapping chart is useful, but it leaves out a whole third dimension, which would be how much a particular group will actually do regarding your campaign. We may have an influential group that strongly agrees with the campaign but can't really focus on it and only signs a support petition. Every other tool can also become more complicated when it encounters the real world.

I would be interested to see research on how often groups win their campaigns when they follow this or similar strategic planning processes. If anyone knows of this kind of research, please let me know. Also if anyone has comments on how helpful these tools are, or uses alternatives, please let me know!

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About **Eric Dirnbach**

Eric Dirnbach is a labor movement researcher and union activist in New York City.

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