



Advocacy Training Workbook

How To Plan And Win A Campaign



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INTRODUCTION

This workbook is for anyone advocating for safer biking, walking, and rolling in Pittsburgh and the surrounding municipalities.

By working through the various elements of creating an effective advocacy campaign, this workbook will help you:

1. Choose the right issue,
2. Develop and meet goals for your campaign and group,
3. Assess your resources,
4. Identify who has power and how to influence them,
5. Communicate effectively, and
6. Choose the best tactics and develop a timeline for executing them strategically.

This is an iterative process that may happen out of order. You may redefine your issue, for example, after going through the exercise of identifying allies and opponents, or you may change your strategy after identifying your targets. After completing the workbook with your campaign team, you should be able to get to work!

BIKE PITTSBURGH

BikePGH is transforming our streets to make biking and walking commonplace for all Pittsburghers in order to improve our quality of life and reduce the harmful effects of car dependence in our communities.

We envision a Pittsburgh where people can thrive without needing to own a car – making Pittsburgh a world class leader in clean, affordable, and convenient transportation.

We believe that people need realistic options in order to change their transportation habits away from single occupancy car trips and toward biking, walking, and transit. We focus on three key areas to achieve this shift: Advocacy, Community, and Education. Together, we will make biking and walking commonplace for all Pittsburghers.

This training is part of our work to realize this vision, which requires successful campaigns in communities throughout the City and surrounding municipalities of Pittsburgh.

This training is adapted with permission from curriculum developed by the Alliance for Biking & Walking, which itself was adapted from curriculum developed by the Sierra Club which was adapted from the Midwest Academy.

CHOOSING AN EFFECTIVE CAMPAIGN: CHECKLIST WORKSHEET

No matter if it's a program or infrastructure improvement, it's helpful to structure each project into a "campaign." Structuring each campaign as a singular goal will help you think through the issue and figure out all of the moving parts, people you need to talk to, and resources that are available to you. All advocacy efforts begin with planning a campaign that has tangible, measurable goals and objectives, so a little bit of up-front brainstorming will go a long way.

Group Exercise: Write the names of your potential campaigns in the boxes at the top of each column. Then, rank each campaign with a 0, 1, 2 or 3 in each box next to the criterion: a '3' for very high fulfillment of that item, '2' for moderate, '1' for low and '0' for not at all. In the bottom column, add up your scores. Of course, the "bottom line" shouldn't dictate your final choice, as some criteria may be more important to you than others, but a lot of support for one campaign should tell you something.

	Potential Campaigns:			
Adhere to Model Campaigns	1. Aligns with similar previously successful "model" campaigns.			
	2. Is winnable.			
	3. Results in definite and quantifiable improvement in the community.			
	4. Makes long-term improvements to the bike/ped environment.			
Community Involvement	5. Enlists the involvement of important groups of people.			
	6. Fits your org's mission, culture and resources; unifies your community, not divides.			
	7. Involves current members in a meaningful way.			
	8. Attracts new members.			
	9. Many people care and at least a few within your constituency are very passionate about this issue.			
Organizational Strength Building	10. Builds your group's political power.			
	11. Leverages positive media and promotion of your organization.			
	12. Has strong fundraising potential. (All 0's if irrelevant.)			
	Totals =			

YOUR CAMPAIGN TITLE: _____

1. DEFINE YOUR ISSUE

Now that you've selected your issue, it's time to define it clearly. **A clear definition of your campaign is critical to its success.** Your mission may be broad (e.g., "making Oakland a better place to bike and walk") but the defined issue of an advocacy campaign should be sharp and narrow ("the Fifth/Forbes Corridor needs bike lanes").

Use the following exercises to refine your definition of the issue that your chosen campaign will address. Use just a few sentences for each item.

1. **Identify the problem:** (ex: ___ street is unsafe due to speeding drivers)

2. **Formulate a solution:** (ex: ___ street should get traffic calming improvements)

3. **Illustrate how to implement the solution, the "fix":** (ex: DOMI should prioritize ___ street for their Neighborhood Traffic Calming program)

4. **List people who care and what's at stake.** (ex: People who walk/bike/roll, safety)

Issue Focus Statement: Now, put these 4 elements together, in a sentence or two that can be recited quickly.

2: SET YOUR CAMPAIGN GOALS

These are the social changes you hope to achieve. What is the specific change you hope to achieve? What are some of the steps that will need to be accomplished to achieve this goal? Is the goal “SMART”—Specific, Measurable, Achievable, Relevant, Time-bound? For the purposes of campaign planning, your long-term goal should be your campaign goal, and your short- and medium-term goals are incremental steps toward your long-term goal. It’s ok for the short- and medium-term goals to be small; those victories keep people energized to win the long-term goal! Be sure to include a target or completion date with each goal.

Your Long-term Campaign Goal: *(ex: Anywhere St gets traffic calming by October 1, 2025.)*

Medium-term Goals	Short-term Goals
<i>Ex: Deliver petition to councilperson by Oct 1st.</i>	<i>Ex: Make a petition by Jul 15th.</i>

How will your goals help you to build your organization? Which goals will grow your community of support and develop leaders?

3. ASSESS YOUR RESOURCES

*Think about your campaign and the group you're assembling. What resources do you have access to? What **strengths** do you have as a person or a group? What **weaknesses** do you have as a person or a group that you'll need help addressing? Who shares your vision, and will join you in pursuit of your goal? Is there a planning entity in your area you can approach for help? Are there **opportunities** out there that you can take advantage of to move forward? Are there **threats** that you'll have to counter, such as vocal opponents to your solution? These questions can be analyzed using the "SWOT" analysis: Strengths, Weaknesses, Opportunities, and Threats.*

List your group's **strengths**, its people with talent and skills, from public speaking to leadership; its connections to powerful or influential people; its money, or opportunities for raising money.

Weaknesses. List those weaknesses that you can overcome by finding the right resource, and those that you can never overcome but should remain aware of.

Opportunities. What external factors present opportunities your campaign can take advantage of? List the most important allies for your campaign. Also consult existing plans and data that indicate your solution is warranted (High Injury Network, Bike(+) Plan, Crash Data, etc).

Threats. What forces in your community could threaten the success of your campaign? What must you be prepared for? List the most important likely opponents of your campaign.

4: IDENTIFY TARGETS

Who has the power to make the change you need to achieve your goal? This exercise will help you identify the most important targets. In identifying these people, be very specific. For example, you should not list the “city council” as a target, but specific members who can give you majority support. It’s not the “Department of Mobility and Infrastructure” you should list, but the specific official with the power to change a policy or initiate a project.

The unalterably opposed are not worth your time; the council members who agree with you are not primary targets, but perhaps secondary targets who can help you persuade their undecided colleagues, your primary targets. See the Power Mapping exercise on the next page to plan how you will reach these targets.

Your primary target is a single person who has the power to make the change you seek.

Primary Target:

Secondary targets are specific people who have influence over your primary target. They may represent an institution that has sway over your primary target. It’s okay to write “???” if you don’t know the best person to focus on in an institution until you do more research.

Secondary Targets:

-
-
-
-
-
-

**Note: you may have multiple primary targets if your campaign involves getting votes to pass legislation. If this is the case, identify a separate list of secondary targets for each legislator you need to “swing” in your favor.*

Now, think about public audiences. Identify a few public audiences that your primary target might listen to (for or against your solution). Think in terms of geography (neighborhoods, towns, counties, etc.) and constituencies (bikers, walkers, business owners, workers, etc.)

Public targets (two or three public audiences):

POWER MAPPING: A TOOL TO IDENTIFY LINKS TO TARGETS AND AUDIENCES

Power Mapping will help you identify power relationships and show you how to influence them. It can help clarify a complex issue and identify those that have an investment in that issue. By mapping out who you are trying to influence (your primary target), and who influences them, you can identify where in the chain *you* have influence. Once you identify the diversity of stakeholders, you can begin to link them together via the issues they care about. By mapping out sources of support and opposition, you can determine exactly where and how you should focus your strategy and outreach.

Step 1: Primary Target

Put your primary target in the center—usually, the person with the power to make the change you seek.

Step 2: Secondary Targets

Put your secondary targets in the ring around your primary target. Consider: What institutions and organizations have sway over your target, and who are the specific individuals within those organizations they'll pay attention to? These can be people you know or don't know. They may be allies, opponents, or neutral – it's useful to include influencers of all types. There may be more than one person associated with a given institution who influence your primary target or there may be some institutions where you don't know the names. Here you can note a question like, "Who is the department head?".

Step 3: Map all other associations with these individuals.

Now, think about the people connected to your secondary targets and add their names in the third ring around your target. This helps you identify the easiest ways to access the people who can help you achieve your primary goal by tapping into existing relationships between people.

Step 4: Identify allies and opponents.

Circle your allies and opponents in different colors. Who is likely on board with your solution? Who is likely opposed or skeptical? Use your best judgment and note that some or many people may be neutral (no color circle).

Step 5: Determine the relational power lines.

Step back and conceptually review the connections between people. Draw lines connecting people and institutions that have relations to each other. Some people will have many while others may have none.

You can also add public audiences outside the third ring and show their lines of connection/influence.

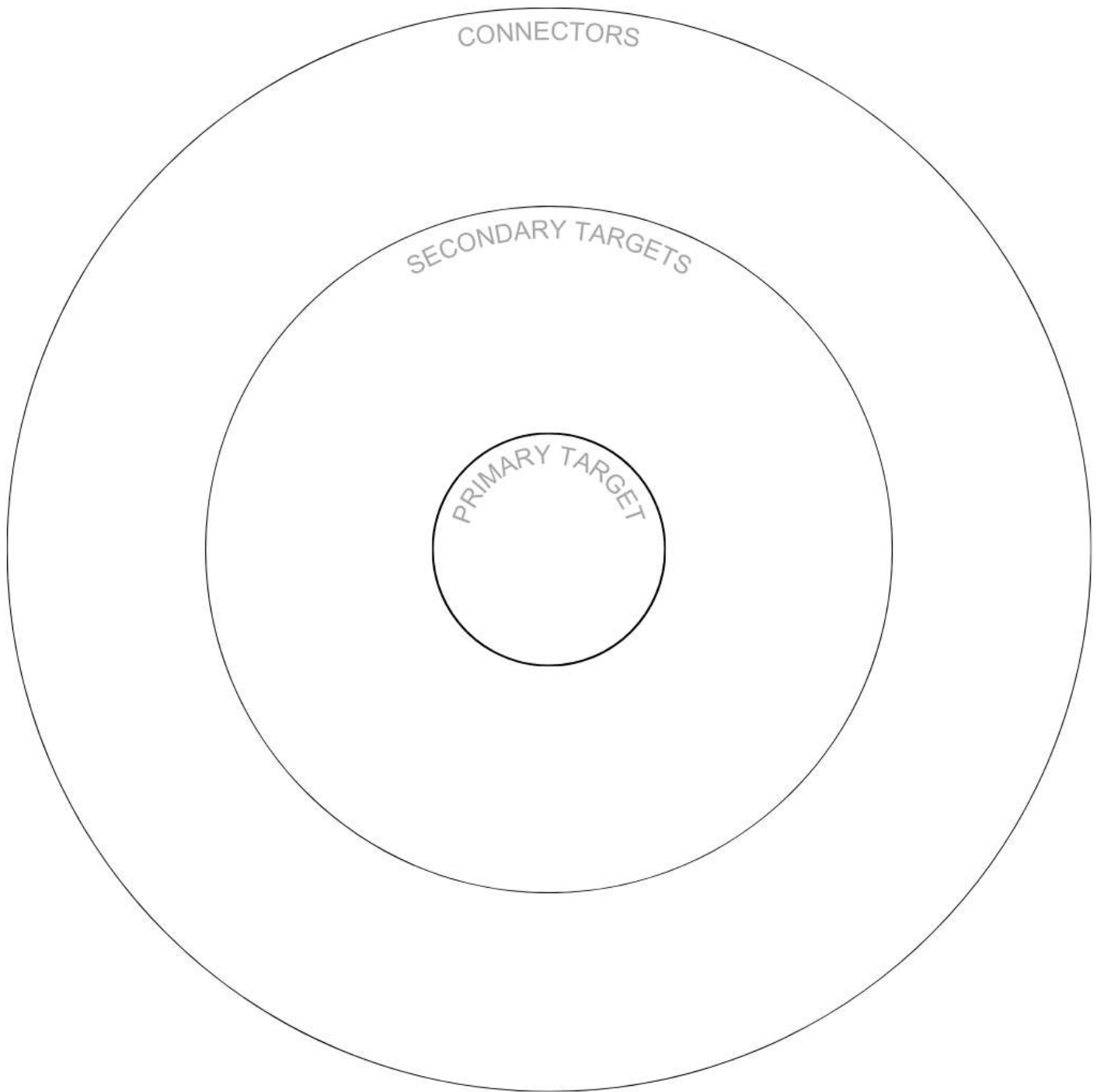
Step 6: Target priority relationships.

The next step is to analyze some of the relationships and connections and make some decisions. One way to do this is to highlight the "nodes of power" that have the most relational power lines drawn to them. Involving these people through your group's current relationships may be deemed a priority. If no one in the group seems to be directly connected to a key target, you can go another step deeper and directly create another power map around each of these people. Another thing to consider may be a person or institution in the map that doesn't necessarily have many different relational lines running to them but nonetheless has a few critical ones and seems to hold a lot of influence. If you can identify a priority person/institution for which there isn't a clear relationship, a task may be to go and do some homework about this person/institution.

Step 7: You're ready to develop a plan!

We'll take a closer look at tactics to influence your targets in the next section.

PRACTICE POWER MAP



5: COMMUNICATE

At its core, advocacy depends upon communication—talking to people, getting press, writing letters and editorials, using social media, etc., so that you can convince them to support your campaign. Effective communication depends on the message as well as the medium. Before you start reaching out to the agents of change and the public audiences you've targeted, you need to develop messaging that is concise, consistent, and compelling to both your target and public audiences.

Now, write a "stair speech"—a short appeal you can relate to a target or audience in 30 seconds. It should include a hook, problem, solution, the benefit, and what they can do.

CAMPAIGN NAME: _____

PRIMARY TARGET: _____

HOOK: *(A way to get attention and connect with your target/audience.)*

PROBLEM: *(The issue and what's at stake?)*

SOLUTION: *(Your campaign -- what you're calling on your target to do.)*

BENEFIT: *(How will the solution help people?)*

CALL TO ACTION: *(What can the person you're speaking with do to help?)*

STAIR SPEECH: *(Combine these elements above in 2-3 sentences.)*

SLOGAN: *(Write a slogan, explaining your issue in 10 words or less.)*

6: TACTICS AND TIMELINES

Now it's time to make your to-do list! A tactic puts pressure on your target to make the decision you want. A timeline threads your tactics into a strategy.

Tactic Criteria Checklist

Each of your tactics should meet the following criteria:

- Effectively achieves your campaign goals.
- Is appropriate to your organization's culture and will strengthen, not divide it.
- Addresses a primary or secondary target or an identified public audience.
- Is fun, or at least not so daunting that you will alienate your base of supporters.
- Is achievable & realistic: you have the resources & skill necessary to execute it.
- Easy to execute for your side & surprises your opponents.

Action Plan

Go back to your medium- and short-term goals from Element 2 and put them on the timeline below. You may want to revise them given what you've learned about your SWOT, targets, and the criteria above! Work backwards from your goals and write down the small, specific actions you'll need to take to accomplish your goals. For each one, assign a date you'll do the tactic or by when the task is "due", and name a lead person who will make sure the task happens, even if they don't do it themselves.

Tactic/Action	Due/Do Date	Lead Person

Notes: