

# UNIT 3:

## DEVELOPING YOUR CAMPAIGN STRATEGY

**ADA Campaign Training Manual**

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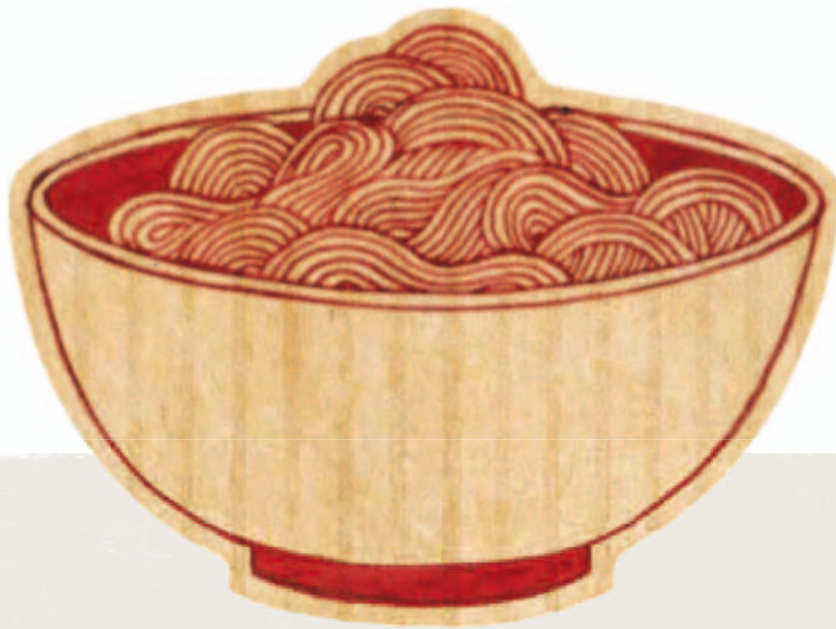


RENPERMAE (Ecuador)

**This unit will help participants understand the different elements of a campaign strategy so that they can develop their own strategy and assess its effectiveness.**

## ELEMENTS OF A CAMPAIGN STRATEGY

In plenary, offer an example of a need someone might feel (eg, “I’m hungry and I want something sweet to eat”). Invite ideas for the steps the person could take to satisfy this need.



40  
mins



## Exercise 1 – Ingredients in making a dish

**Divide the group into two and ask each group to choose a simple, national food dish. Tell them they must agree all the steps necessary to produce this dish. To order the sequence of steps correctly, ask them to note each of the steps on the coloured cards provided.**

Bring both groups back to plenary and hear each in turn, running swiftly through each step. Let the other group comment, and invite feedback on clarity or gaps in the steps. Liken their plan for making the national dish to the steps involved (strategy) in campaigning. For example, the person wants to eat rice with fish (their goal); they need certain ingredients (the elements); they need to know how long to cook the food (timing); and there may be a number of ways to achieve a tasty meal (the method).

Explain that this simple exercise has shown that any process:

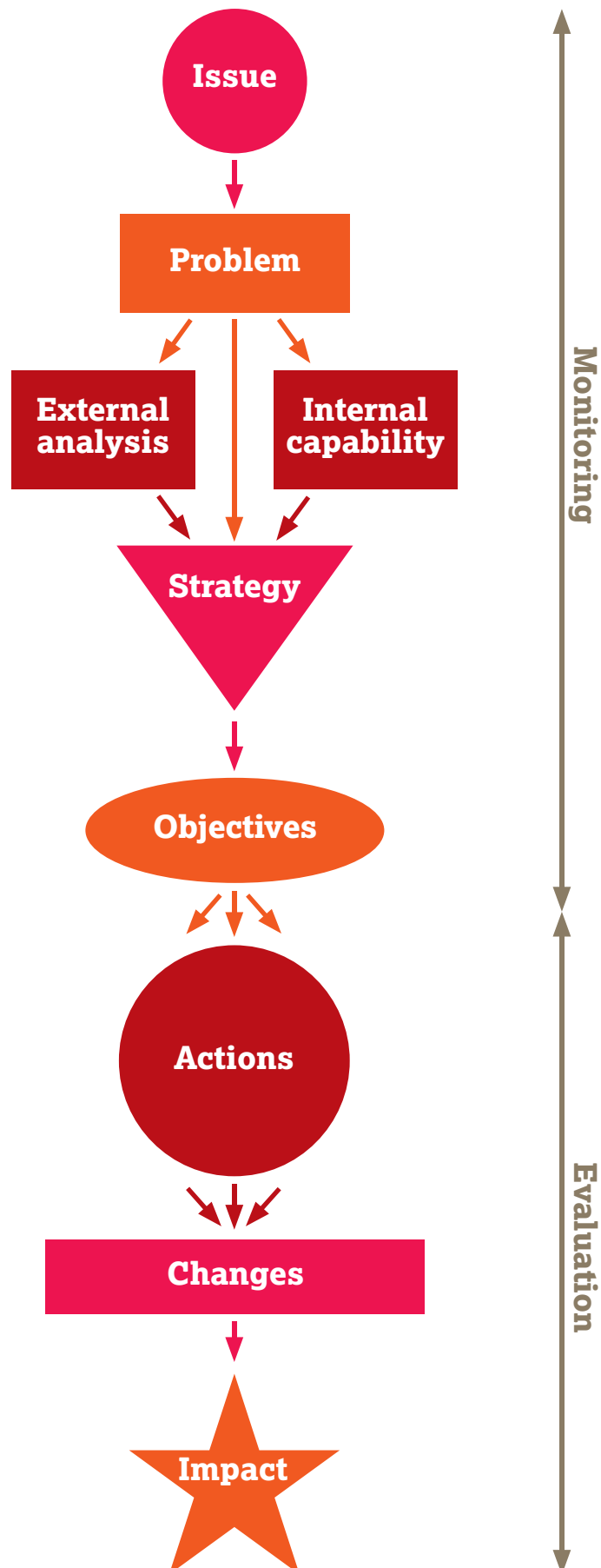
- should have a goal
- should have distinct parts
- relies on certain elements
- needs sufficient time
- relies on a range of approaches
- requires certain resources, knowledge and skills.

In the same way, a good campaign strategy clearly outlines the essential components.



## The campaign strategy process

(Please refer participants to Handout Unit 3.1)





## **Exercise 2 – The campaign strategy process**



**Using Handout Unit 3.1, split participants into small groups. Allocate a set of cards to each group, with one component of the “Campaign strategy process” written or printed on each card. Invite each group to arrange the cards in a logical, timely sequence.**



In plenary, set out the card sequences from each group alongside each other. Let the participants comment on the similarities, and where there are any differences, discuss these.

Point out that all stages are important parts of a campaign strategy. Some occur more than once; but none should be skipped. Share the “Campaign strategy process” with the group.

# MAKING CHANGE HAPPEN

In plenary, observe that it can be quite a challenge to get from the stage of setting campaign aims to actually achieving results that will have a tangible impact on people's lives. Being committed to developing a campaign strategy requires determination, time and patience.

A campaign slogan is helpful to convey a quick flavour of the wider message behind a campaign. "No kerosene" is the slogan of a current campaign to change fuel use to renewable energy. Another example of a strong, inspirational slogan is "Make poverty history", referring to the international campaign for more equitable development. These statements are signposts that point the public and supporters to the wider strategy. Invite participants to give other examples of slogans that relate to bigger campaign strategies.



HelpAge International



## Exercise 3 – What is a campaign “strategy”?

Using Handout Unit 3.2, ask participants to form pairs and share what the meaning of strategy is from their experience.

Back in plenary, invite the pairs to give some definitions of strategy.

Offer the following as alternative descriptions:

- “A campaign strategy describes what happens when a group seeks to make a significant advance on a specific issue.”
- “A strategy sets out co-ordinated actions which aim to achieve specific, concrete objectives in a timeframe.”

A strategy can help your campaign to:

- find its pathway (that is, act as a roadmap)
- firm up its plans, activities and aims
- gain approval and raise resources
- communicate plans to other stakeholders and secure their participation
- be a reference point for monitoring and evaluating what the campaign is achieving.



Note: It is easy to confuse strategy and tactics. Elicit participants’ ideas on the differences between the two.



HelpAge International (Kyrgyzstan)



HelpAge International (Tajikistan)



## Checklist

Tactics can be seen as concrete actions – for example:

- distributing and gaining signatures for petitions
- writing letters to decision makers
- organising peaceful protests or street marches
- holding public meetings or hearings
- arranging private meetings with decision-makers
- participating in working groups or councils.



Note: Strategy is about more than just tactics – it is a realistic assessment of where your campaign is, what its aims are, and how you can achieve them.





Zivo90 (Czech Republic)



100  
mins



3.3



## Exercise 4 – Considerations for external and internal strategies

**Explain that the group will now look at some considerations that make up both internal and external strategies. Using Handout Unit 3.3, split participants into two groups. Give printouts of points 1-5, “Considerations for your external strategy”, to the first group. Give printouts of points 6-9, “Considerations for your internal strategy”, to the second group.**

**Ask each group to discuss their elements to be sure that they understand them. Circulate between the groups to ensure that any questions they have are answered and that all group members fully understand the different elements. Invite each group to divide into pairs and team up with a pair from the other group to form groups of four. Let participants share the elements so that they explain and learn about all nine stated considerations.**

In plenary, invite participants to discuss the nine considerations in turn. Discuss each consideration in order to build the complete list to embed learning. Ask participants for any considerations which may be missing, collectively discuss any suggestions, and either reject or incorporate them.

## A strategy can be based on nine considerations:

### Considerations for your external strategy

- 1. Problem** – this needs to be expressed from the start so that the campaign can begin to be enacted and people are attracted to support its activities
- 2. Audience and targets** – identifying both audiences and targets
- 3. Message** – reaching audiences, targets and wider stakeholders requires developing persuasive messages, all deriving from the core message
- 4. Messengers** – identifying who are the most reliable messengers for different audiences and targets
- 5. Communication** – how is the campaign communicating its messages, and through which media?

### Considerations for your internal strategy

- 6. Resources** – sustained energy and action are needed to resource the campaign, but it also needs people or finances or physical resources such as venues and information technology (IT)
- 7. Gaps** – be alert to where any gaps arise as the campaign progresses and to what can be done to address these gaps
- 8. The first efforts** – think of ways of promoting the strategy and act on the short-term objectives, building a foundation for the next steps
- 9. Monitoring and evaluation** – check how the campaign is progressing, assessing all the elements and adjusting actions accordingly

(Adapted and summarised from: Shultz J, *Strategy development: key questions for developing an advocacy strategy*, San Francisco, Bolivia, The Democracy Center, 2011)



MUSA (South Africa)

# DEVELOPING A STRATEGY

## Creative thinking – using pictures and language

Some campaigners create a chronological storyboard. This is a creative way of setting out their strategy using pictures and some key words. These storyboards show the picture of their campaign’s “critical path” and helps campaigners work out how they will make their story happen. Storyboards simply depict a sequence of key scenes.

Storyboards can be sketched in any way and on any material. All it requires is imagination and some strategic thinking.



## Exercise 5 – Creating a storyboard

**Invite participants to join in small groups and select one issue per group. Distribute plenty of A4 paper and thick, coloured marker pens. Invite each group to produce a storyboard that shows the key elements of their campaign.**

In plenary, let each group briefly show their storyboards, and then explain how easy or hard they found this exercise. When each group has finished, invite the whole group to reflect on the benefits of using this technique to begin the process of strategic thinking and planning.



Arte y Cordes (El Salvador)



## Checklist

- This method allows for creative thinking.
- It can reveal whether objectives are realistic, and where to make adjustments if not.
- It is not intimidating.
- It can be a motivating alternative to complicated planning tools or strategic theories.
- It provides an inspiring push to bring the pictures to life in reality.
- By thinking in pictures, it helps campaigners think of concrete events.



Note: Concrete actions include things like: occupying a building, releasing a dove, conducting a survey, visiting a politician, writing a letter, sending an email, speaking to a crowd, or occupying a nuclear reprocessing plant. Things that are not concrete actions include “addressing the issue”, “working on the subject”, “developing awareness” and “reaching the public”.

Point out that there are many examples of strategising on any campaign issue. Early decisions are needed to pin down the most effective strategy. This requires knowledge of the issue, the context, and the capabilities of campaign activists and supporters.

There are many ways to conduct a campaign, but the type of strategy chosen and used will underpin the entire campaign.



## Exercise 6 – The different types of strategising

**Divide participants into six pairs or small groups. Using Handout Unit 3.4, allocate one example of the different types of strategising to each group. Support each group to come up with an explanation and example(s) for their strategy type.**

### **Examples of types of strategising include:**

- building a popular base
- stimulating co-operation
- educating the public
- convincing and lobbying decision-makers
- taking a legal/judicial angle
- confronting targets head-on – even “naming and shaming”.

Back in plenary, ask each group to share their strategy type, the explanations they came up with, and to give examples. Allow time for questions and clarification.

Point out that larger organisations commonly use a strategy to provide a framework for their campaigning. For example, Amnesty International’s campaigning adopted a strategy that covered: long-term work such as global campaigns and human rights education; shorter-term urgent action and crisis response; and thematic projects and tactical campaigning to address emerging opportunities and threats.

# SIGNS OF A SUCCESSFUL CAMPAIGN STRATEGY

In plenary, ask participants to sum up what campaigning is, and explain that:

- A.** campaigning addresses a problem or issue you see in your world
- B.** campaigning aims to make or bring about positive changes in people's lives.



Note: A classic strategy contains: objectives, activities, monitoring and evaluation, resources, and risks.



## Exercise 7 – Taking the TEA test

**In plenary, share the following acronym: to run an effective campaign, it needs to pass the TEA test:**

**Touch**

**Enthuse**

**Act**

Give out slips of paper that each describe what Touch, Enthuse, and Act mean. Give each slip to a confident speaker to read out to the group, slowly, so that the group can properly absorb the information. Ask people whether they agree with the explanations or not, and facilitate a discussion.



## **Touch**

An effective campaign needs to Touch people: it needs to make a connection with its target, strike a chord with others, and prompt a response. But it needs to do much more than that. It is all very well touching your target with your message, but they might decide that it is all so depressing or difficult that there is nothing they can do to change the situation.

## **Enthuse**

A campaign needs to go beyond touching people to Enthuse them. An effective campaign convinces its target audience that there is a solution that could remedy the problem that is affecting them.

The campaign must contain elements that will enthuse people and deflect any defeatist or negative thoughts. But touching and enthusing are no good for the campaign if you cannot move onto the third part of the TEA test. You need to touch and enthuse people to ensure that they decide to Act on your campaign message.

## **Act**

Campaigning is all about believing that ordinary citizens can bring about changes to address the wide range of problems facing people around the world. And it is about influencing decision-makers, at whatever level, to show and then demonstrate their agreement with the campaign's ambitions. To achieve this goal, you need a campaign message that passes the TEA test: ask yourself, do your campaign messages pass the TEA test?

(Much of this section has drawn on 'Tips on what makes a campaign effective', from Ellis J, *Campaigning for success: how to cope if you achieve your campaign goal*, London, NCVO, 2007)



## **Exercise 8 – Chances of success**

**End the session with a simple activity that participants can do as individuals. Using Handout Unit 3.5, write out the 12 points listed overleaf on flipchart paper and put them up in pairs at six stations around the room. Invite participants to circulate to the six stations and note for themselves how many of the statements apply to their own current or intended campaigns.**

Re-group in plenary to see how individuals assessed their own campaigns or potential campaigns and to deal with any questions that may have arisen.



## Campaigns are most successful when:

1. The campaign is firmly motivational, not educational
2. The objectives resonate with the public (they are widely felt; arouses emotion)
3. They are winnable: objectives are realistic and achievable in a workable timeframe
4. There is a clear and simple “ask” or action that supporters can take
5. Supporters are involved and actively engaged in the campaign – everyone is an ambassador
6. The approach is creative, but easily understood
7. Supporters have the opportunity to be actively engaged in a range of activities
8. The campaign is supported by wider alliances of civil society groups and NGOs
9. The media are attracted by the campaign message and activities, and provide extra publicity
10. The issue allows campaigners to speak from experience and contribute their expertise
11. The issue is one where changes will result in real improvements in people’s lives
12. Campaigners are persistent and don’t give up if they don’t see immediate changes

Above all, campaigners should just try things – don’t be afraid of failure!

Wrap up: Please refer to facilitators’ notes in Appendix A for guidance on monitoring progress and embedding learning.



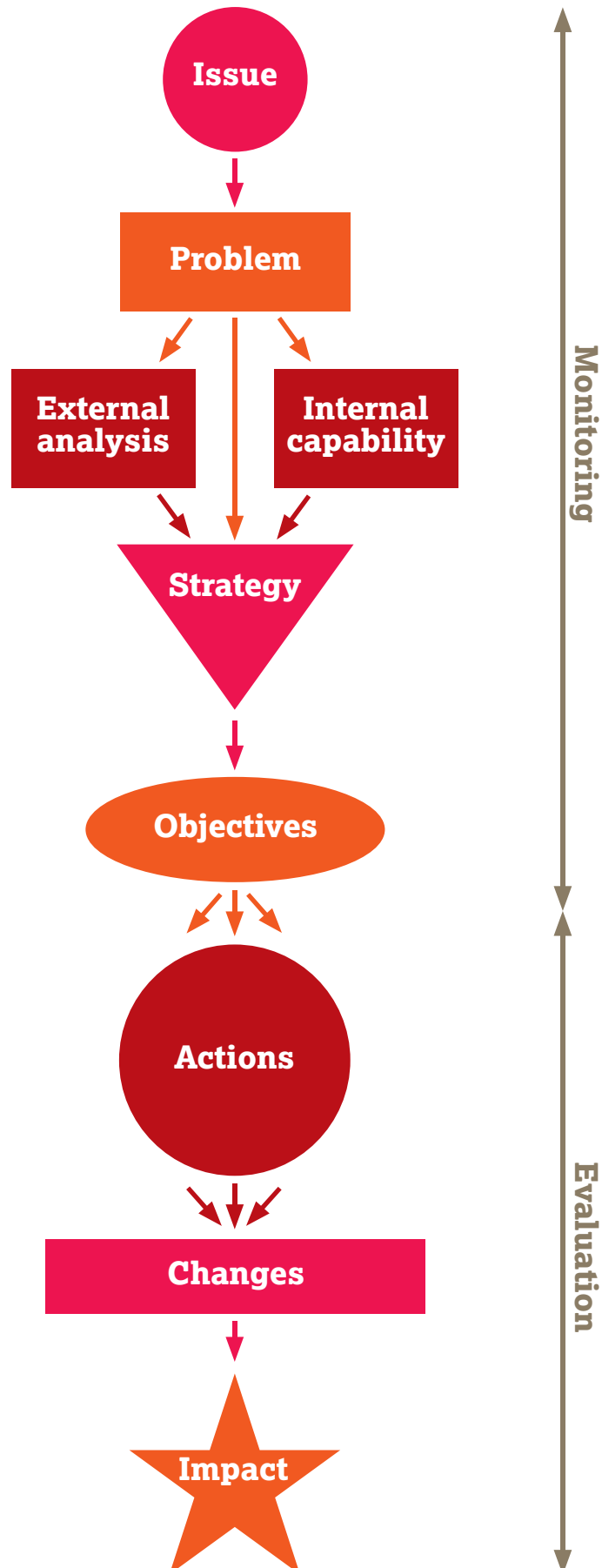
# UNIT 3:

## HANDOUTS



# Handout Unit 3.1

## The campaign strategy process





## Handout Unit 3.2

**“A CAMPAIGN STRATEGY DESCRIBES WHAT HAPPENS WHEN A GROUP SEEKS TO MAKE A SIGNIFICANT ADVANCE ON A SPECIFIC ISSUE.”**

**“A STRATEGY SETS OUT CO-ORDINATED ACTIONS WHICH AIM TO ACHIEVE SPECIFIC, CONCRETE OBJECTIVES IN A TIMEFRAME.”**

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HelpAge International (Tajikistan)



### **Checklist**

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## Handout Unit 3.3

**A strategy can be based on nine considerations:**

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Zivot90 (Czech Republic)



MUSA (South Africa)

## Considerations for your internal strategy

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## Handout Unit 3.4

### Examples of types of strategising:

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- stimulating co-operation
- educating the public
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- confronting targets head-on – even “naming and shaming”.





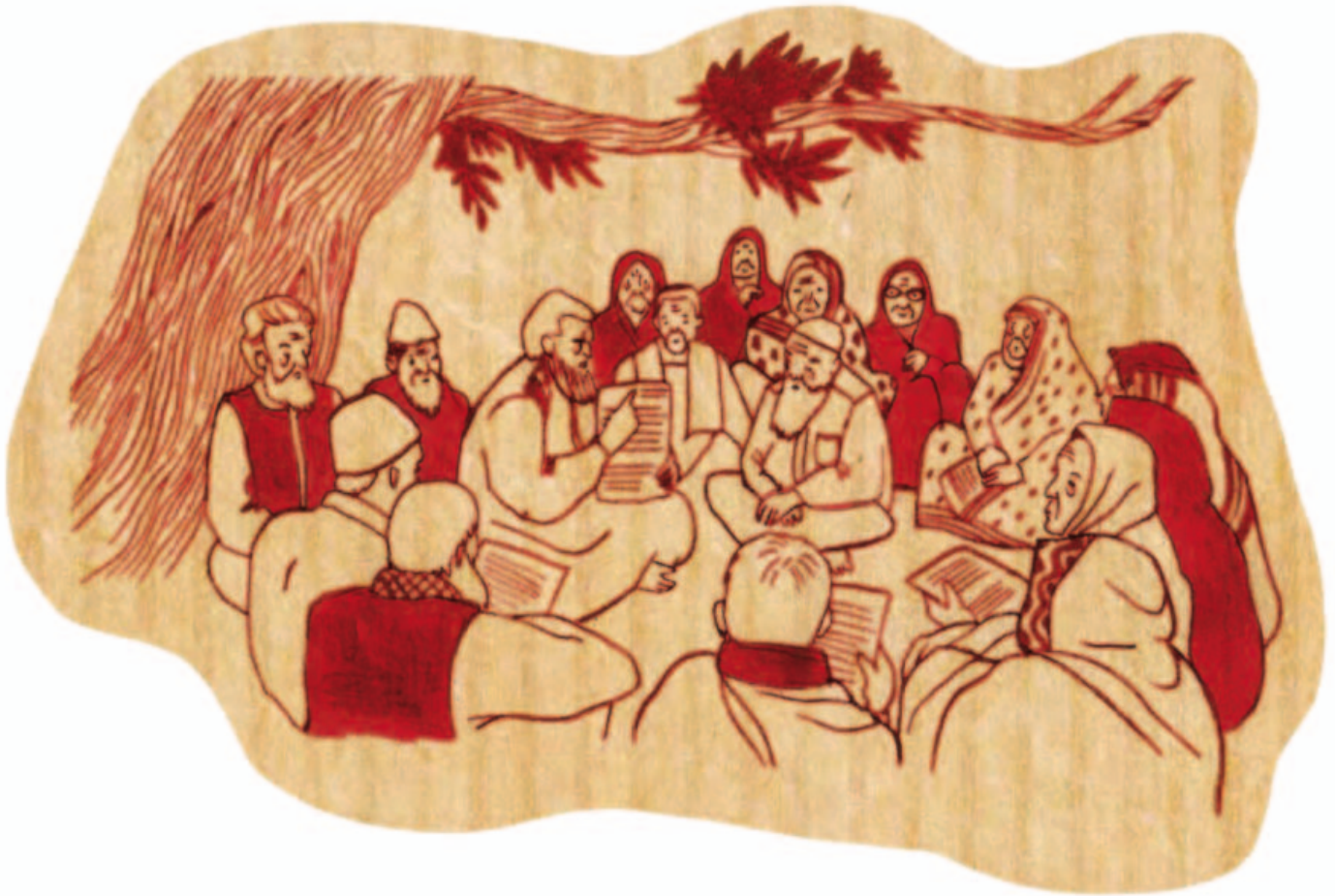


## Handout Unit 3.5

### Campaigns are most successful when:

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- 2.** The objectives resonate with the public (they are widely felt; arouses emotion)
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Above all, campaigners should just try things – don't be afraid of failure!





# Handout Unit 3.6

Older people are at the heart of campaigns work. Through this training and the ongoing engagement of older people, we are growing a global movement of campaigners who will portray the characteristics listed below.

**PROFILE OF AN OLDER PERSON CAMPAIGNER**

**YOU**

- ...CAN DIALOGUE AND DEBATE AND PERSUADE AND YOU CAN WIN!**
- ...ARE SURE TO MAINTAIN AND ATTEND TO YOUR GROUP**
- ...HAVE A UNIQUE PLACE TO SPEAK CREDIBLY ABOUT ISSUES – BECAUSE YOU EXPERIENCE THEM**
- ...ARE KEEN TO INFORM OTHERS ABOUT OLDER PEOPLE AND THEIR REALITIES**
- ...HAVE A HEART TO DEVELOP YOUR GROUP**
- ...ALLOW PEOPLE TO SELF-IMPROVE TOGETHER**
- ...ARE STRONG WHEN YOU CONSIDER YOUR OWN VALUES, CULTURE AND HISTORY**
- ...ARE READY TO PARTICIPATE**
- ...ARE A GOOD ANCHOR FOR YOUR GROUP**
- ...UNDERSTAND THE CONTEXT, ESPECIALLY THE POLITICAL CONTEXT**
- ...ARE A VALUABLE SPOKESPERSON FOR THE MEDIA**
- ...CAN SPEAK ABOUT YOUR LIFE AND THE CHALLENGES YOU FACE IN AN ENGAGING WAY**
- ...SHOW EFFECTIVE LEADERSHIP IN THE GROUP OR MOVEMENT**
- ...DEPEND ON THE SOURCE OF POWER WITHIN YOURSELF**

## PROFILE OF AN OLDER PERSON CAMPAIGNER RHODA NGIMA, 77, KENYA



HelpAge Kenya

**“We have been removed from a very dark pit and brought to the surface where there is light. ADA has made me an ambassador to spread news about older people. I have learnt that even in older age I am able to do something worthwhile and constructive for my country.”**

**Rhoda Ngima**

Rhoda has long been a pivotal figure in her church and community, where she brings people together, inspiring them to stay strong and keep going through life’s challenges. She’s now bringing her leadership experience and social commitment to ADA, where she’s already made a big impact.

In 2009, she led an ADA delegation to meet the Prime Minister. And the following year, she met the Minister for Gender, Children and Social Development to explain the benefits of increasing pensions. After the meeting, the Government agreed to raise pension payments for all older people in Kenya.

In 2012, Rhoda travelled to Brussels where she met several Members of the European Parliament. In her speech, she spoke about her life in Kenya and the challenges older people face in developing countries, urging the European Union not to forget her generation.

She passionately believes that the world’s older people should unite as one voice.



HelpAge Kenya

This is one unit from a set that makes up the ADA Campaign Training Manual. You can download single units, or the full manual from:

**[www.agedemandsaction.org](http://www.agedemandsaction.org)**

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**ADA**  
*Age Demands Action*

**HelpAge  
International**  
*global network*

Age Demands Action is a HelpAge global network campaign