Toronto & York Region Labour Council

Campaign Planning Handbook

By Rob Fairley and Mike Balkwill

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Introduction

Campaigns are all about power. Understanding the power relationships that shape our world and learning how to better create our own power is at the heart of effective campaign planning.

Today we are facing the resurgent drive of global capital to change the rules of the post-war "social contract" between business and labour. Economic restructuring, technological change and deregulation pose serious challenges to us all. Workers who were excluded from the post-war "social contract" are being hit the hardest.

Relying on past practice will not be sufficient to protect living standards, working conditions and public services. A key part of rebuilding the power of our movement is improving our ability to plan and wage effective campaigns.

This handbook draws on the work of countless people and is meant to be shared and improved upon through experience. It was written for unions, but principles of campaign planning apply to all social movements.

Some notes about this second printing

- Only minor changes were made for the second printing.

- A word about strikes: Too often, campaign planning methods are not used to build powerful collective bargaining campaigns. (Let's remember that a strike is a tactic, not a strategy.) This *Campaign Planning Handbook* was originally drafted as planning guide for collective bargaining campaigns.

- The Toronto & York Region Labour Council has published a discussion paper for use with this Handbook. Visit labourcouncil.ca to download *Preparing Local Unions for Powerful Campaigns - Achieving a "State of Readiness"*.

- Facilitation notes and worksheets for some of the Handbook's exercises and a Powerpoint presentation of Appendix 4 are posted at campaignorganizing.org

- When possible, this *Campaign Planning Handbook* and the *State of Readiness* discussion paper will be translated into languages other than English.

- The authors welcome your questions and comments: info@campaignorganizing.org

Getting ready for campaign planning

1 Win an organizational commitment to the planning process

This commitment should include:

- The participation of people who have the authority to conduct strategic planning for the organization as well as people who will be involved in the "hands-on" organizing. It is no longer adequate to delegate responsibility for major campaigns to committees with limited authority and resources. Strategic planning and campaign planning should include union executive boards and staff.

- Adequate time to do the planning.

- A location where the process will not be interrupted.

- A trained facilitator whenever possible.

2 Use a participatory process

How an organization develops a campaign plan has a big impact on the success of a campaign. Participatory planning draws on the life experience and intelligence of participants, as well as input from "experts". Participatory planning is more likely to design a campaign that is grounded in reality.

Participatory planning creates new leaders and develops their ability to think strategically and to work in a collective way. Planning is just the first step in an unfolding process that continues throughout a campaign – Plan, Act and Evaluate.

Campaign planning

1 Create and maintain a respectful environment

Ask participants at the planning session to set standards of respectful conduct. In a safe environment, problems can be spoken about – and overcome. Participants can share their experience, and reveal their inexperience. Leadership groups which create and maintain a respectful environment can function effectively through the stresses of a campaign.

Establishing a respectful environment can be the beginning of creating a culture of listening in an organization. (Training in effective listening should be a central part of campaign training.)

> **Listening:** *A group of people cannot become a community without developing the habit of deep respectful listening to one another.*
>
> Anne Hope and Sally Timmel. *Training for Transformation: A Handbook for Community Workers.* Practical Action, 2000.

Connect with the participants in the planning session. Create opportunities for them to participate fully: What is motivating them to take part in the campaign? What is at stake for them? What insight, experience, relationships and resources do they bring? What systemic obstacles do they face?

2 Conduct a strategic assessment

A deep understanding of the context in which we are operating is essential to building an effective campaign. We keep our understanding of the context up to date by paying close attention to how it is changing throughout the campaign. We pay particular attention to how our campaign impacts the context.

In addition to participatory exercises, consider inviting a guest speaker. A speaker with a clear analysis of the "big picture" can add important insight to a planning session.

Timeline – to assess context

The process of conducting a strategic assessment often starts with the creation of a timeline showing events relevant to the campaign. Timelines can show past events, current events and future events. Both internal events (events within the union) and external events can be charted on a timeline. Timelines are useful for identifying looming threats.

See Timeline Exercise, Appendix 1.

Campaign calendar

Posting a campaign calendar, and adding to it throughout the planning session, is an effective way of charting upcoming campaign events and campaign deadlines.

Force Field Analysis – External

Many factors combine and collide to create the "force field" in which a campaign operates. The force field shifts as economic, political and other forces influence each other. A successful campaign will become powerful enough to impact the force field as well.

The force field exercise can help us to:

- Identify and evaluate external factors (economic interests, political trends, global forces, environmental concerns, laws and institutions, etc.) which are working for us, supporting us – including existing campaigns related to the campaign being planned.

- Identify and evaluate external factors (economic interests, political trends, global forces, environmental concerns, laws and institutions, systemic barriers, etc.) which are working against us, threatening us.

- Identify trends.

- Reflect on the interaction between corresponding positive and negative forces.

- Identify measures to reduce the impact of negative forces.

- Identify dangers and opportunities.

- Create strategic objectives. (What must be accomplished if we are to succeed?)

See Force Field Analysis, Appendix 2.

3 Conduct an internal assessment

There is an internal force field in every organization. Understanding that force field and making it a topic of open discussion in the planning process can be the difference between success and failure.

Force Field Analysis – Internal

In addition to analyzing the external context, the force field exercise can help us to:

- Identify and evaluate internal factors (organizational issues, systemic barriers, divisions, etc., within our organization) which are working against us.

- Initiate a discussion about ways to reduce the impact of negative internal forces – and ways to strengthen the positive forces.

- Explore the interaction between the internal and the external force fields.

The exercise can also create opportunities to:

- Discuss our strengths and vulnerabilities.

- Identify what we must accomplish internally (within our organization) if we are to succeed. (These are internal imperatives.)

See Force Field Analysis, Appendix 2.

Spectrum of member support

Spectrum exercises have many applications, including as a tool for measuring member support for the union and/or for the campaign. This exercise also helps us to:

- Identify barriers to increased member support and participation and measures to overcome them.
- Anticipate internal stresses that may arise as the campaign unfolds.
- Measure and understand member support at the assessment phase of a campaign.

See Spectrum of Member Support, Appendix 3.

Equity imperatives

Every campaign is an opportunity to challenge systems of oppression in society as well as in our movements. What systemic barriers are impacting member support and participation in the union? What are the equity goals of the union? What actions to overcome systemic barriers can be taken when creating and executing the campaign plan?

Power mapping

Our unions and social movements were shaped during the post-war "social contract" noted in the introduction of this handbook. The Power Mapping exercise described in Appendix 4 challenges us to examine the status quo in our unions. It challenges us to reflect on the value of the routine functions that preoccupy many of our organiza-tions, even while under significant external threats. The exercise suggests pathways to reconnecting with the power of our members and winning greater leadership focus on campaign issues.

See Power Mapping, Appendix 4.

4 Set campaign goals

Set internal goals

These are organizational, capacity-building goals. Equity goals are important when setting internal goals. An example of an internal goal: "Identify and develop a diverse group of young leaders during the course of the campaign." Achieving internal goals often requires training and other resources.

Set external goals

These are the main goals of the campaign, beyond the internal goals. External goals are often expressed as demands. For example: Good Jobs Now, Stop the Cuts, Hands off our Pensions, etc.

Set maximum and minimum goals

It is usually possible to set maximum and minimum goals – both internal and external. An example of a minimum external goal: "We may not be able to defeat all of the attacks against us, but we will make sure that the credibility of our opponent is so damaged that they will think twice before attacking us again."

Consider the "high moral ground" when setting your goals

We are on the high moral ground when our cause is just and our actions are principled. Here are a few questions for exploring this issue:

- Do we believe in the justice of our cause?

- Are we effectively communicating that our cause is a just cause?

- How can we get on the moral high ground?

- What will it take to stay there?

- What mistakes might we, or others, make that could remove us from the high moral ground?

- What internal measures must we put in place to protect our place on the high moral ground?

- What is our opponent's claim to the high moral ground?

- How can we expose our opponent's claim as false?

Take a stance

If the level of commitment from participants is unclear in the goal-setting exercise, check out their "stance" regarding the campaign and its goals. Is the campaign really important to them? Are they willing to fight to win? Will they commit the necessary attention and resources?

5 Consolidate and activate members

Plan an internal campaign

A union's greatest source of power is its members, yet unions sometimes plan extensive campaigns directed at "the public" without building an internal campaign which engages members.

- Are there workplace issues which relate to the campaign?

- How can members' community connections strengthen the campaign?

- How can the campaign be given relevance and profile in the workplace?

- What actions can members take in or near the workplace?

- How can members be engaged in the campaign in their communities?

- How can members' families be engaged in the campaign?

- Is it possible to set up a campaign committee that includes rank and file members?

Strengthen member support

Reflect on the Force Field Analysis (Internal), the Power Mapping exercise and the Spectrum of Member Support to identify obstacles to member participation and measures to strengthen member support and engagement.

6 Identify and investigate the primary target

Definition: *The primary target is the person with the power to give us what we want.*

Identifying the primary target can be challenging. Primary targets often set up decoys to deflect, confuse and manage opponents. Employers, for example, use managers and Human Resources departments to contain us. Governments set up "arm's length" bodies which use consultation to demobilize us.

Sometimes, as we apply pressure, we discover that we have identified the wrong person as the primary target – and we must redirect our pressure. The key question is this: "Who has the authority, the power, to say 'Yes' to our demands?"

Investigate the primary target. Research its finances, history and key relationships. What are the strengths and vulnerabilities of the primary target?

You may be able to find vulnerabilities by researching the "official policy" of the primary target (its mission statement, for example). Contrast the target's "official policy" to its "operating policy" (how it actually conducts itself).

7 Identify tactics that apply direct pressure on the primary target

Whenever possible, we direct tactics directly at the primary target. We must motivate our primary target to give us what we want. Or, in other words, provide a compelling reason, to our primary target, to give us what we want.

Whenever possible choose tactics which:

- apply maximum pressure on our targets
- apply as little pressure as possible on our members
- engage our allies without overextending them, and
- are familiar to our members and unfamiliar to our targets.

Often, primary targets are hard to reach, so we must identify leverage targets who *are* within our reach (see next section).

8 Identify and investigate leverage targets

Definition: A leverage target is a person who has influence over the primary target and is someone we can pressure to exert that influence in a way that is advantageous to us. Leverage targets are sometimes referred to as secondary targets.

Identifying leverage targets is a great way to broaden a campaign and to increase the pressure on a primary target. When mounting a campaign against an employer, for example, leverage targets usually play a key role. An employer's customers, suppliers, bankers, regulators, middle management, etc. are all potential leverage targets.

If your campaign has international reach, identify leverage targets in other countries.

Brainstorm and then prioritize a list of leverage targets.

See Leverage Targets, Appendix 5.

Note: Leverage targets are not allies. Allies are people with whom we have a bond of common interest and values. Allies are people with whom we have built a relationship of trust. Making a distinction between allies and leverage targets can open the door to working to influence people whom we do not trust, people whom activists might otherwise stay away from.

9 Identify tactics that apply pressure on leverage targets

What tactics might the campaign, or its allies, use to apply pressure on the leverage targets you have identified? Where is the leverage? How can the leverage be applied?

10 Define strategic objectives

Strategic objectives are gains we must achieve in order to put our campaign goals within reach. Strategic objectives may be internal or external.

- An example of an internal strategic objective: "We must win the general support of our members and the active participation of 25% of our members – if we are to stand a chance of winning the campaign."

- An example of an external strategic objective: "To have a chance of winning the campaign, we must discredit the central argument of our main opponent."

When we set objectives:

- We are forced to think seriously about how we are going to win.

- We are able to set priorities and focus our efforts.

- We are better able to plan an effective sequence of campaign activity.

- We provide hope. (By achieving objectives, we create conditions in which our goals are winnable. Objectives sometimes appear more achievable than our ultimate goals.)

- We can measure the progress of our campaign.

11 Plan strategic initiatives

Strategic initiatives are *sets* of tactics which allow us to achieve our strategic objectives. By planning strategic initiatives which are designed to achieve strategic objectives, our tactics are better co-ordinated and produce more results. Without strategic objectives and strategic initiatives, campaigns can end up being a jumble of tactics, with little focus and less chance of winning.

12 Identify allies and opponents

Allies

As noted above, allies are people with whom we have a bond of common interest and values. Allies are people with whom we have built a relationship of trust. The exercise titled Spectrum of Allies and Opponents is used to identify and rank the campaign's allies and opponents. The exercise is also used to identify ways to activate allies and neutralize opponents.

See Spectrum of Allies and Opponents, Appendix 6.

Winning allies to take action to pressure our primary and leverage targets is usually a requirement for success. Creating, developing and protecting respectful relationships with allies is a top priority. We must not only know their strengths, we must understand and respect their limitations and constraints.

In the era of globalization, unions are looking beyond borders to find new allies – people in similar, and often more difficult, situations.

Opponents

It is important to understand the sources of our opponents' power, their strengths and their vulnerabilities. Effective research can provide crucial information.

13 Create communications strategies

Campaign planning can provide important information and insight for designing communications strategies.

- Develop internal and external themes and messages.

- Create an internal communications plan.

- Create an external communications plan.

- Create a record of campaign activities and materials.

14 Put the plan in writing

Create a written account of all aspects of the campaign plan. Include a statement of strategy which pulls together the key elements of the campaign plan. This helps us evaluate the plan, helps us to communicate it to others, and helps us to implement it.

15 Secure resources

Resources may include people, money, materials, facilities, clerical support, training, and research.

16 Address organizational issues

When addressing organizational issues, determine what the organization must be able to do. An organization should be designed to suit the functions it must perform. (Form follows function.)

It may be time for a review of existing structures: What should remain the same? What should be revised, combined and/or separated?

It may be time to create new structures which better suit the required functions.

17 Plan next steps

- Perform "work planning" (a function separate from campaign planning). From the campaign plan: Define tasks, assign tasks, identify resources of all kinds that are needed for each task (including training), establish lines of reporting and accountability.

- Establish measures of success. For example: "We will know when we have achieved an adequate level of member support for the campaign when we are able to get 25% of our members out to a campaign rally".

- Create an implementation plan including a campaign timeline.

- Create a method of operation that supports effective implementation and ongoing evaluation.

Implementing a campaign plan

1 Introduction to implementation

Campaigns encounter unfolding challenges as campaign plans are implemented. Successful campaigns move people into action, putting pressure on our targets, our allies, ourselves and others. They create ripples and waves of change. (Ineffective campaigns are often predictable and uneventful.)

To paraphrase a well known comment about military campaigns: "No campaign plan survives first contact with the opponent". This means that once a conflict starts, everything about our plan is tested, including our assessments of the "lay of the land", the strengths and vulnerabilities of our opponent, our own strengths, etc. The effectiveness of our initial plan of action is also tested. Adjustments to our plan should be expected. If our plan is well-conceived, however, the broad strategic strokes will likely stand the test of conflict.

By adopting "Plan, Act, Evaluate" as a continuous practice, campaigns are able to successfully implement and adapt their plans under changing conditions.

It is often said that strategy is an art. We can learn art by studying art history, by taking classes in technique, by studying the art of others and by creating our own art – often with the guidance of a mentor.

We must develop our command of the art of strategy in order to successfully implement a campaign plan. Creating a campaign plan is demanding. It is a far greater challenge to successfully implement

a campaign plan – to wage a campaign assertively and effectively in shifting conditions.

2 Before the campaign launch

Before we launch our campaign, we ask ourselves many questions, including:

- Have we created a comprehensive campaign plan?
- Have we established a campaign organization which is capable of implementing it?
- Have we done detailed work planning?
- Have we established accountability?
- Have we established a "mode of operation" (a way of working) which uses the participatory planning model and sustains a continual practice of "Plan, Act, Evaluate"?

3 During the campaign

Here are some questions we ask ourselves about internal campaign issues:

- Are we maintaining a safe environment in which people are respected and can participate fully?
- Are we paying attention to detail when implementing our work plans?
- Are we avoiding distractions and maintaining our focus?
- Are we maintaining our accountability?
- What are we learning about our assessment

of internal factors impacting the campaign?

- Are our members engaged in the campaign?

- Are our allies taking action? Are we asking enough of our members and allies? Are we asking too much? Are we maintaining unity? Are we listening to them in a thorough way? Are we keeping them engaged and in the loop?

- What new diverse leadership can be supported?

- How can our organization be protected and strengthened?

Here are some questions we ask ourselves about campaign activities and the shifting context in which we are operating:

- What are we learning about our assessment of external factors impacting the campaign?

- What opportunities are emerging? How can we advance our campaign by tying it to unfolding events? Are there opportunities for taking actions which surprise, rattle, pressure and/or expose our opponents?

- What are we learning about our primary and leverage targets, our opponents? How are they responding, acting? Have we been able to get them to engage, to respond to us? If not, why not? What vulnerabilities are emerging?

- Are we monitoring our opponents so that we know when they contradict themselves or otherwise make a mistake? What actions can we initiate to take advantage of these openings and opportunities?

- What attacks against us must be responded to?

- Are our opponents spreading misinformation which must be challenged?

- Are we successfully framing the public debate and telling our story? Is our message resonating, gaining traction, with our members, allies, targets?

- Are our tactics effective in creating pressure, in creating openings?

- Are we being creative in developing new tactics?

- Are we achieving the strategic objectives that we set for the campaign? If not, what must be done?

- Are we making the necessary adjustments to our plan as we go?

- Are we maintaining our position on the high moral ground?

- Is victory within reach? What must we do in our final drive to achieve it?

4 Post-campaign evaluation

Each campaign prepares the ground for the next. If we have been operating with a comprehensive campaign plan, we are able to conduct an effective post-campaign evaluation. It should be a wrap-up of ongoing evaluation throughout the campaign. Clear goals and objectives make it possible to evaluate both our successes and our failures. We are able to understand what worked and what did not. We learn about our allies, our opponents and ourselves. We learn about the power we are up against and we learn about our own power. We develop our strategic skills.

Timeline

What lies ahead? What's coming over the hill at us?

Upcoming internal events (i.e. events within the union)

Upcoming labour movement events

Upcoming "big picture" events

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE

JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER

Force Field Analysis

	Look for trends	Reflect	How can we reduce the impact of negative forces?	How can we strengthen the positive forces?
What is working AGAINST us externally? • the employer • the economy • political developments	Conservative majority in Ottawa Free trade deals Hostility to unions			
What is working AGAINST us internally? i.e., within the union	No-one wants to participate without getting paid for it			
What is working FOR us internally? i.e., within the union	Some members "get" the seriousness of the threat Lots of experience			
What is working FOR us externally? • social forces • allies • etc.	Many people share our values			

Spectrum of Member Support

What percentage of members is in each category?

Active pro-union members	Inactive pro-union members	Middle		Inactive anti-union members	Active anti-union members
		Friendly	Disengaged	Unfriendly	

L

R

____ %   ____ %   ____ %   ____ %   ____ %   ____ %
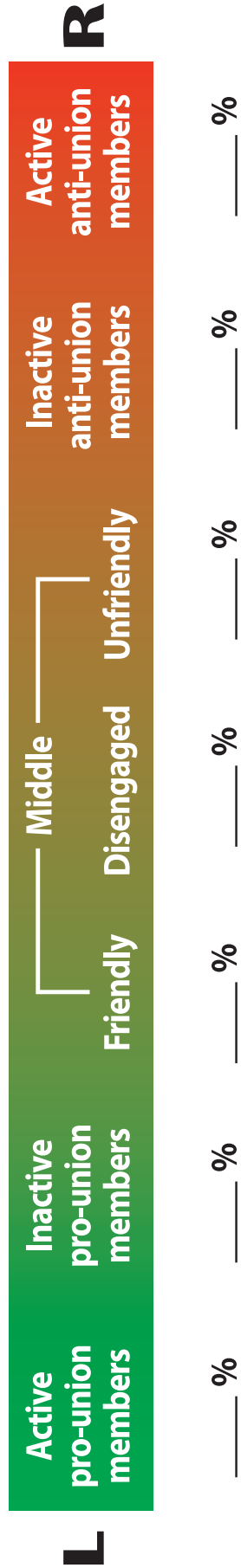
Goal: Move each group at least one category to the left

Active pro-union members	Inactive pro-union members	Middle		Inactive anti-union members	Active anti-union members
		Friendly	Disengaged	Unfriendly	

L

R
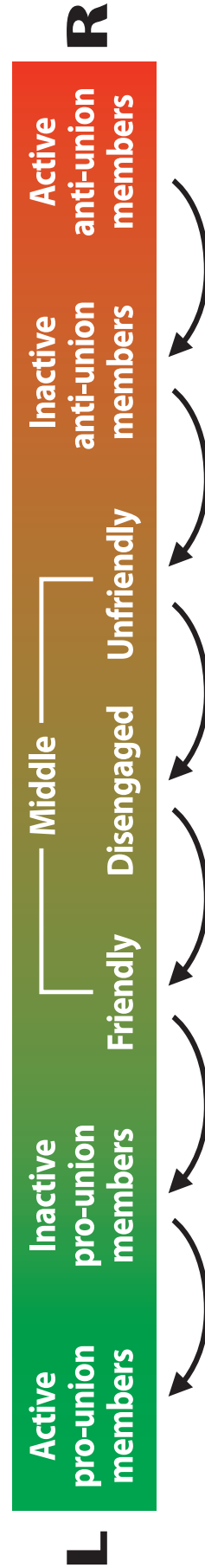
Sequence of action: Consolidate the left, neutralize the right, win over the centre

Introduction to Power Mapping

Powerful campaigns will play an important role in meeting the challenges facing our movement. Although attacks against working people are mounting, winning organizational commitment and resources for campaigns can be difficult.

This exercise challenges us to examine the status quo in our unions in order to:

- Reconnect with the power of union members.
- Shift leadership attention and resources away from routine union functions.
- Ensure that campaigns to defend the interests of working people are a top priority.

The exercise is designed to raise questions and find solutions, not to lay blame. The problems highlighted may not apply to all unions.

The following text and diagrams are a few snapshots from a comprehensive power mapping exercise, not process notes for facilitating the exercise.

Part 1: Mapping the status quo

Step 1

The exercise starts with mapping the employer and union members on a large sheet of paper.
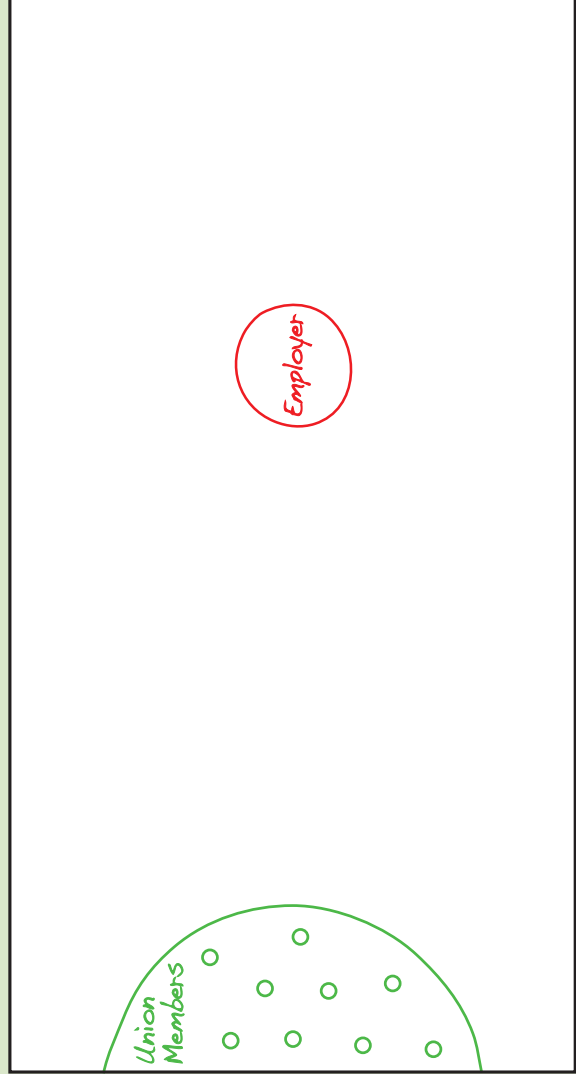
Step 2

The union organization, shown on the diagrams as "union org", is then brought into the exercise. (The union organization includes the local executive board, union stewards, committee members, etc. – and in many cases the union staff representative.) Participants are asked, "In a perfect world, where would you put the union organization on the page?"

Here?

Here?

Here?

Union org.

Union Members
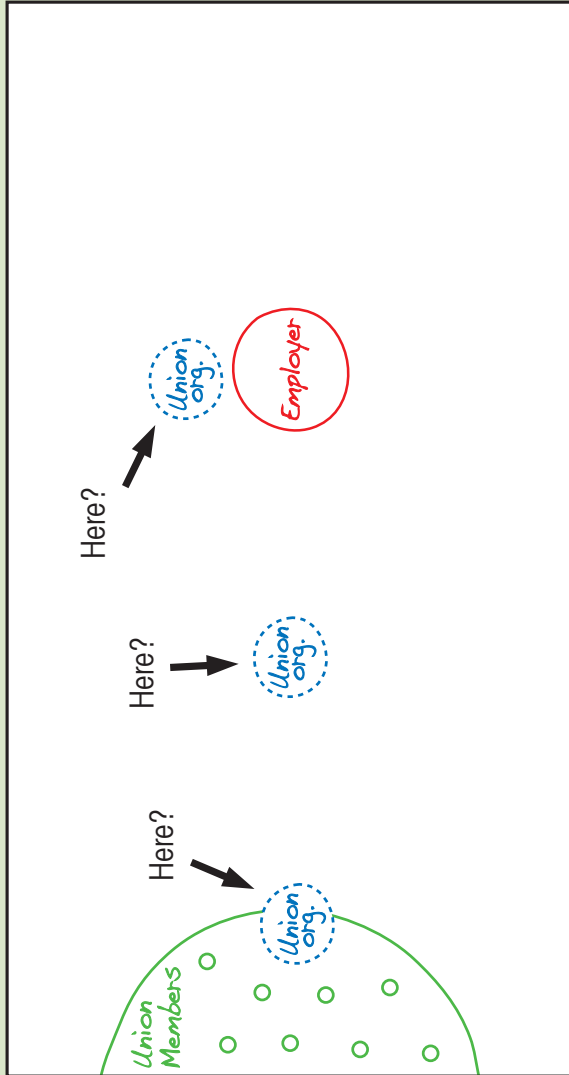
Union org.

Employer

Step 3

After discussion, participants are told, "For the purposes of exploration, the union organization will be placed halfway between the members and the employer."

Union org.

Union Members
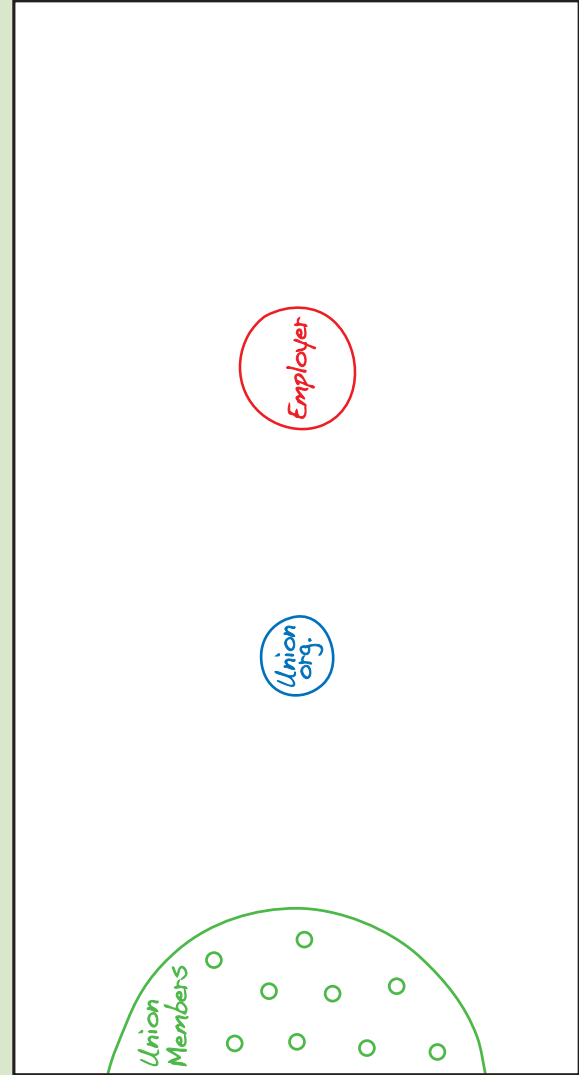
Employer

Step 4

Participants are then asked to list interactions between the union organization and the employer. Local leaders are able to produce long lists.

Interactions between the union organization and the employer.

- Labour/management meetings
- Grievance hearings
- Health and Safety meetings
- Redeployment and staffing meetings
- Collective bargaining sessions
- Pre and post bargaining sessions
- Countless other joint meetings
- Phone calls
- E-mails
- Informal discussions

Step 5

The interactions between the union and the employer are represented by a series of double-headed arrows. The arrows are double-headed because most of these communications are two-way.

When asked how much they are accomplishing in their many interactions with the employer, local leaders reply that they are accomplishing less and less. At the same time, many report that the time spent with the employer is on the increase.

Union Members

Union org.

Employer
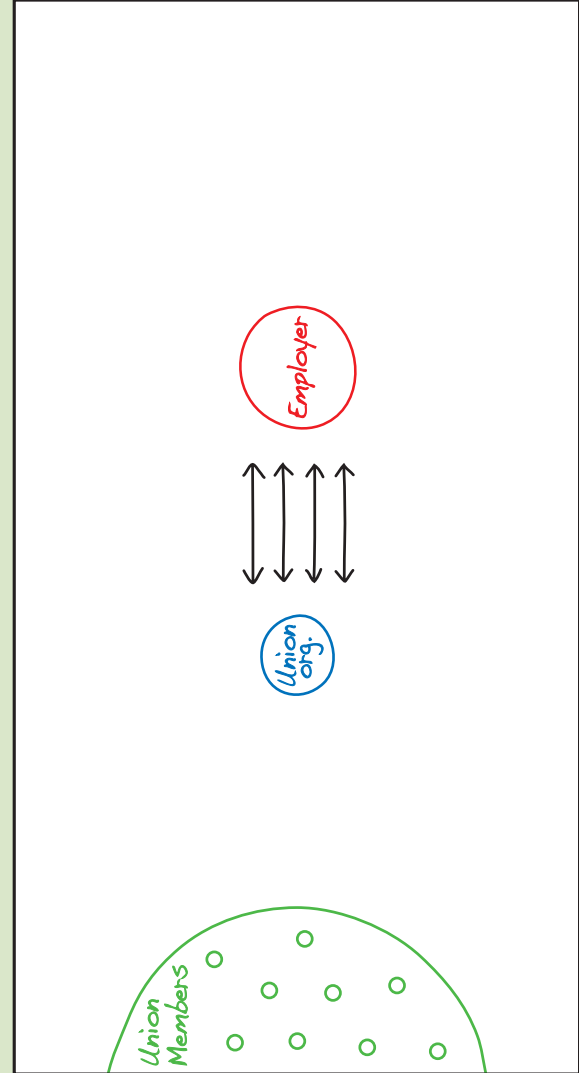
Step 6

When asked to list interactions between the union organization and members, local leaders come up with a much shorter list – especially when meetings with members who are "in trouble" are subtracted.

For many reasons, interactions with a typical member are hit and miss and are not usually face-to-face.

Interactions between the union organization and a typical union member

- Union bulletin board
- Union newsletter
- Union website
- Union meetings (low attendance)
- Automated phone calls
- Occasional workplace visits

Step 7

Interactions between the union organization and union members are represented by an arrow shown as a dotted line, with only one arrowhead – to show that the communication is infrequent, rarely face-to-face and usually one way. Most local leaders report that they are usually too busy to visit members in the workplace.

Union Members

Union org.
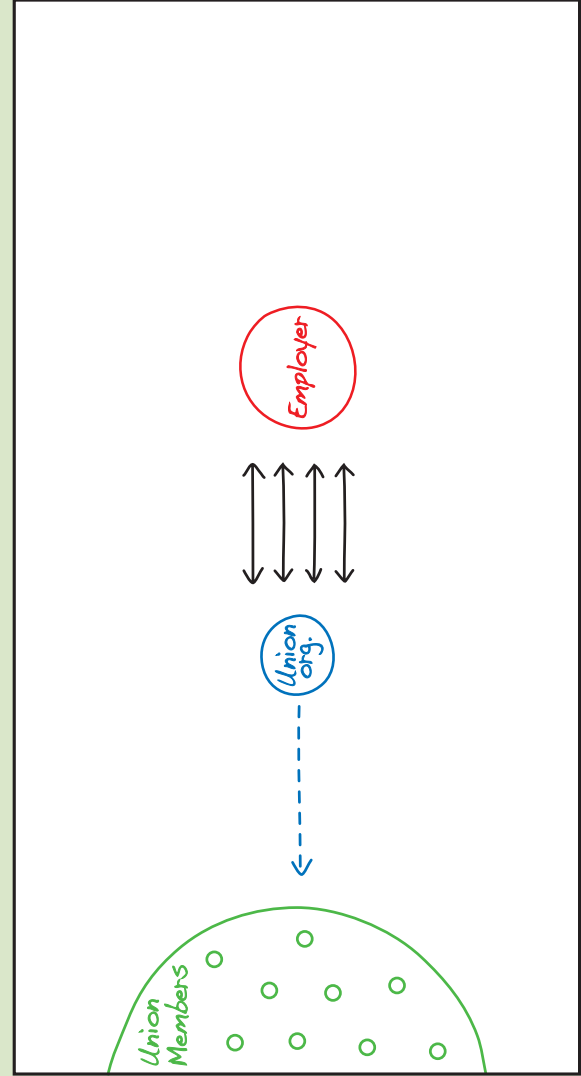
Employer

Step 8

Local leaders often end up in a bubble with the employer. Even when local leaders are accomplishing something useful, members do not know that they are making the effort.

Some employers are intentionally using consultation to reduce union resistance and to tie up union leaders in endless meetings. "Keep 'em talking!"
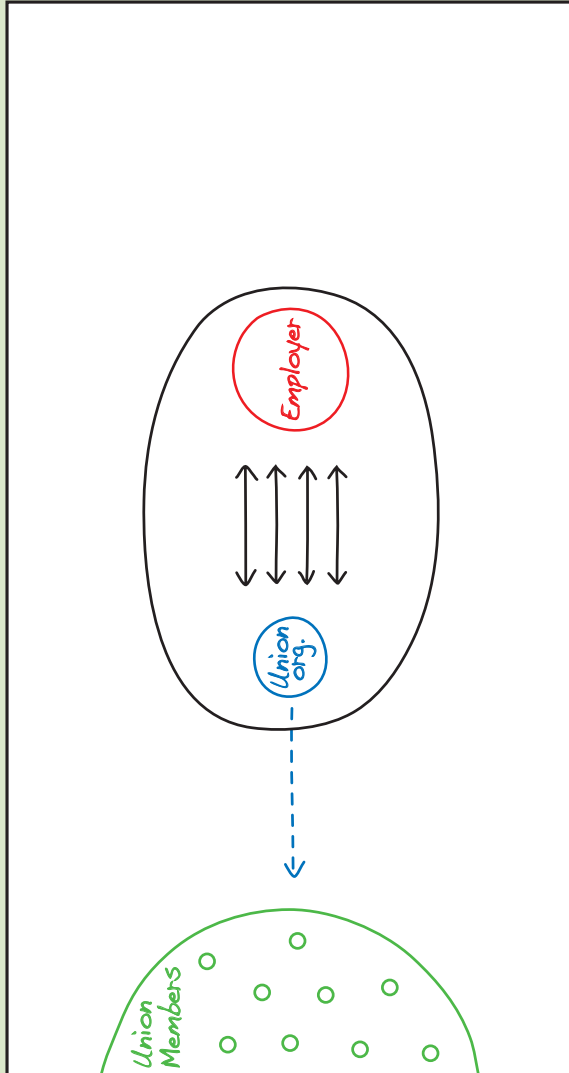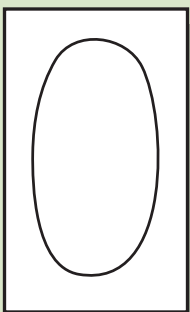

Step 9

When local leaders are rarely in the workplace and are spending much of their time with the employer; a disconnect can develop between the members and the union organization. Members come to view the union as distant. Sometimes they view the union as closely linked to the employer.

And local leaders, disconnected from their members, often feel powerless in the bubble.

Participants are asked, "What's wrong with this scenario?"
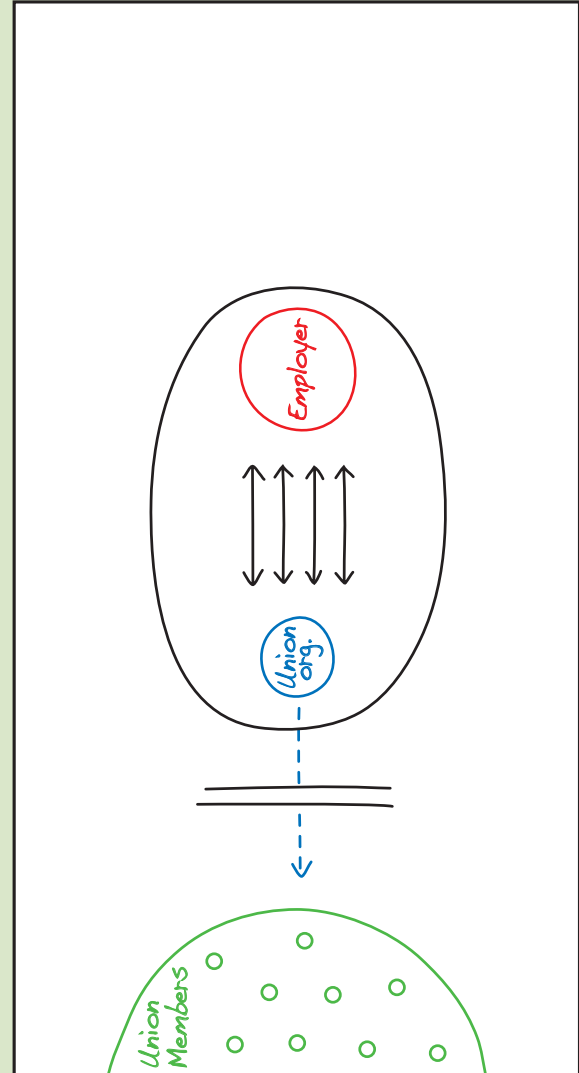
Step 10

Consultants coach cop" tactics directed union membership.

agreement and workplace, employers use "trust". As local leaders and the Stockholm Syndrome can come into play.

Employers bypass the union. They build ties with u from the union. Local leaders are encouraged to fee employers' point of view.
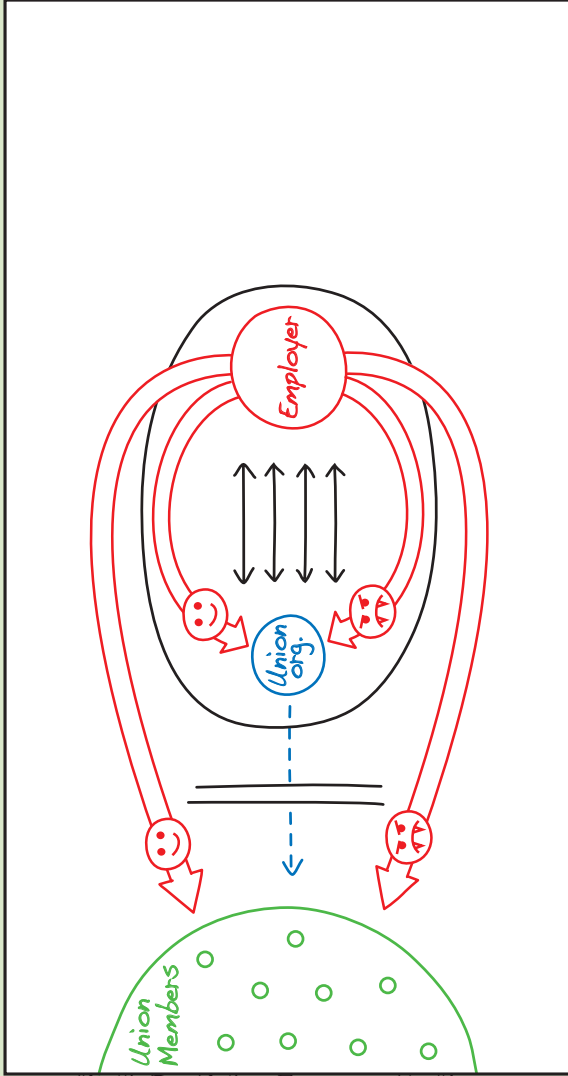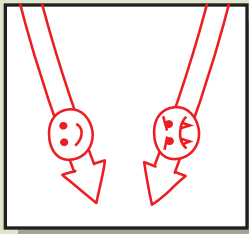
Step 11

Meanwhile, powerful forces threaten us. The threats we face are drawn down one side of the page as a reminder of the challenges we face outside the bubble.
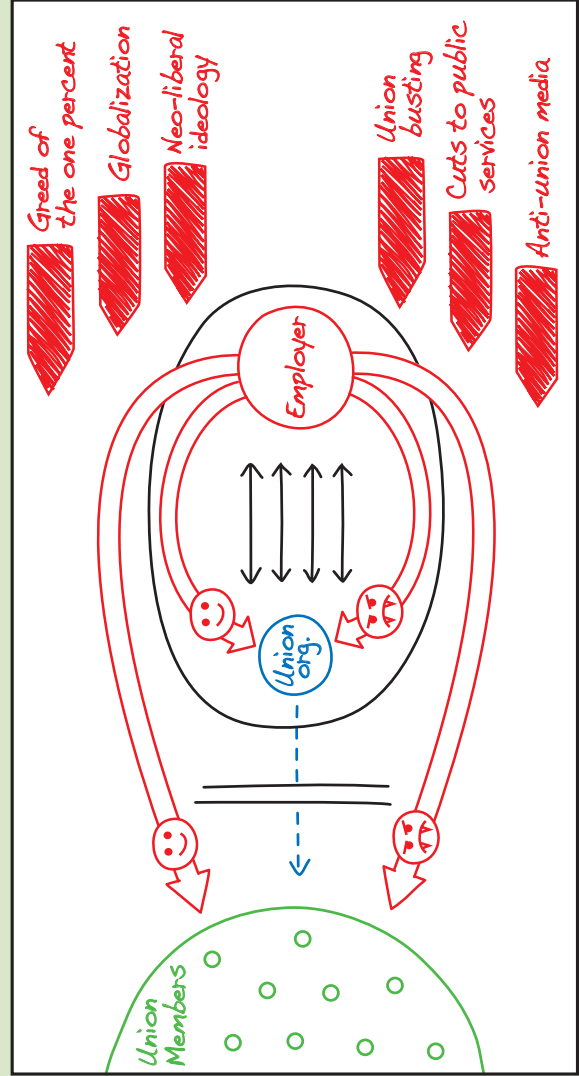
The power map diagrams spark a lot of discussion and debate.

Part 2: Mapping solutions

Step 1 – Make a plan

The Labour Council's discussion paper, *Achieving a State of Readiness*, provides suggestions for strengthening our unions. A planning session with the local Executive Board is usually the place to start. The Power Mapping exercise can be a part of the planning process. Some of the solutions suggested by participants in the Power Mapping exercise are listed below.


Step 2 – Break the information bubble

Improve the information flow to members about what is happening in the bubble. Members need to know that the union is advocating for them with the employer and that the employer is ignoring the collective agreement and saying, "No" to legitimate concerns. This will help to direct member frustration at the employer, not the union. Publicizing the stance of the employer can help the union leadership reconnect with members. Challenge the "happy face" propaganda of the employer. Affirm the problems facing members in the workplace.
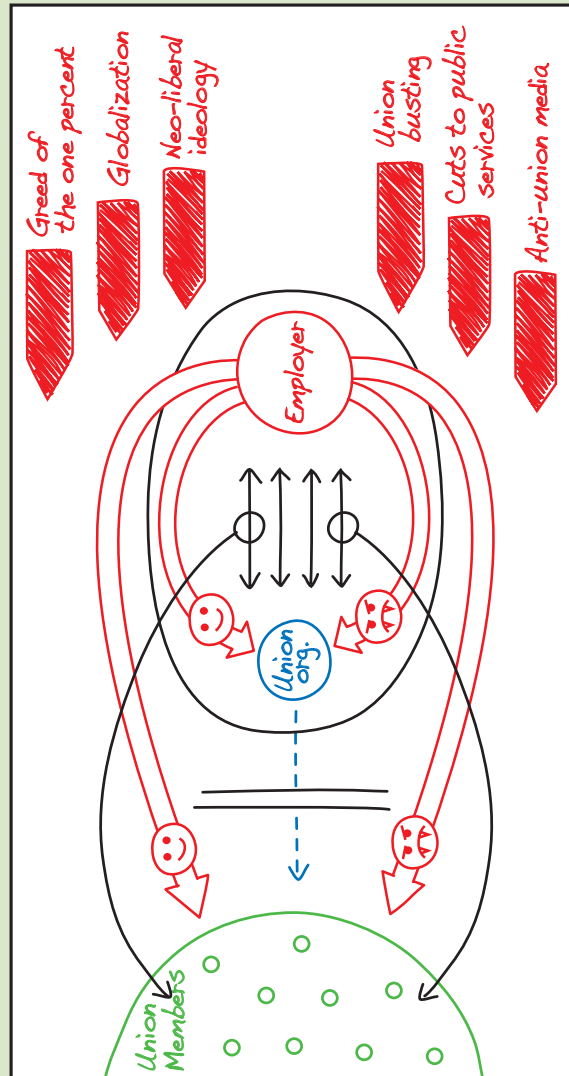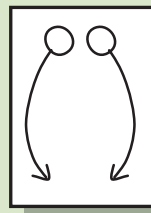
Step 3 – Get out of the bubble

Redefine the union's relationship with the employer – and do it in a way that is visible to the membership. (Be ready for the employer to say, "No more favours from us!") Establish a healthy boundary with the employer. This does not mean that labour relations must be stormy – it means that there must be a clear delineation between the union and the employer.
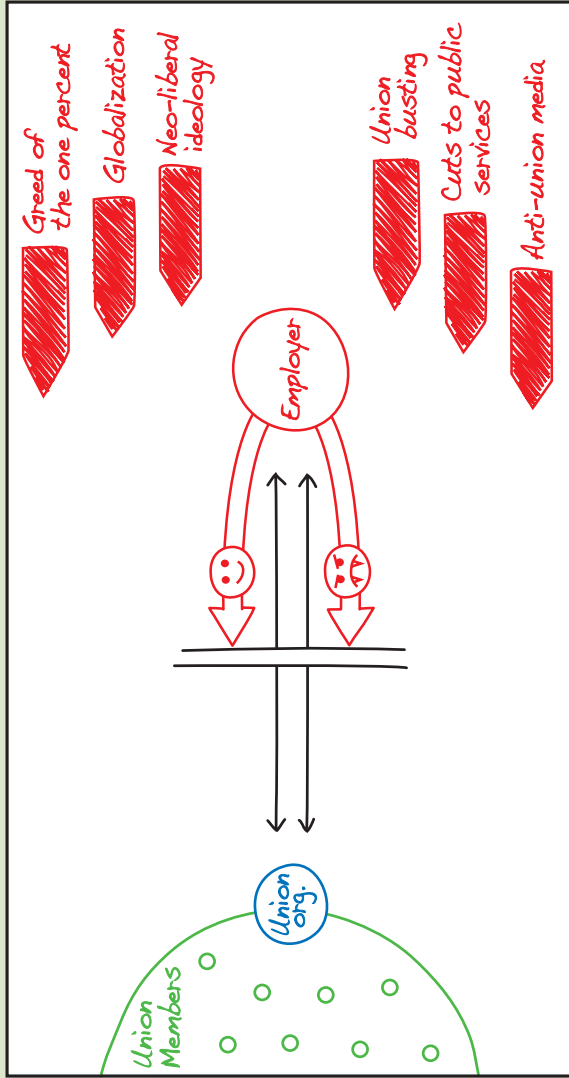
Step 4 – Challenge employer initiatives

Mount challenges to employer initiatives which are seeking to undermine the union values of members and/or leaders. Slash the time spent on unproductive interactions with the employer. Reassert the union as sole collective bargaining agent: Make sure that all "employee" representatives on joint committees are accountable union representatives.
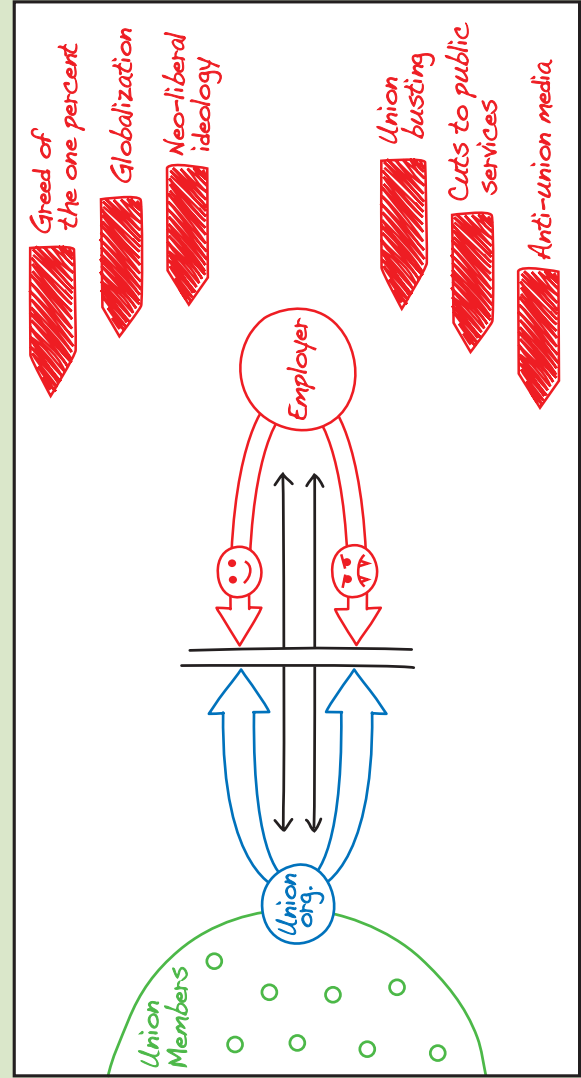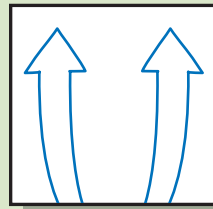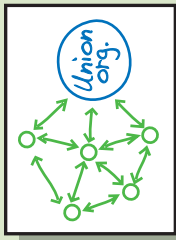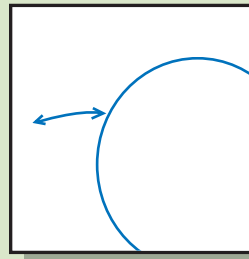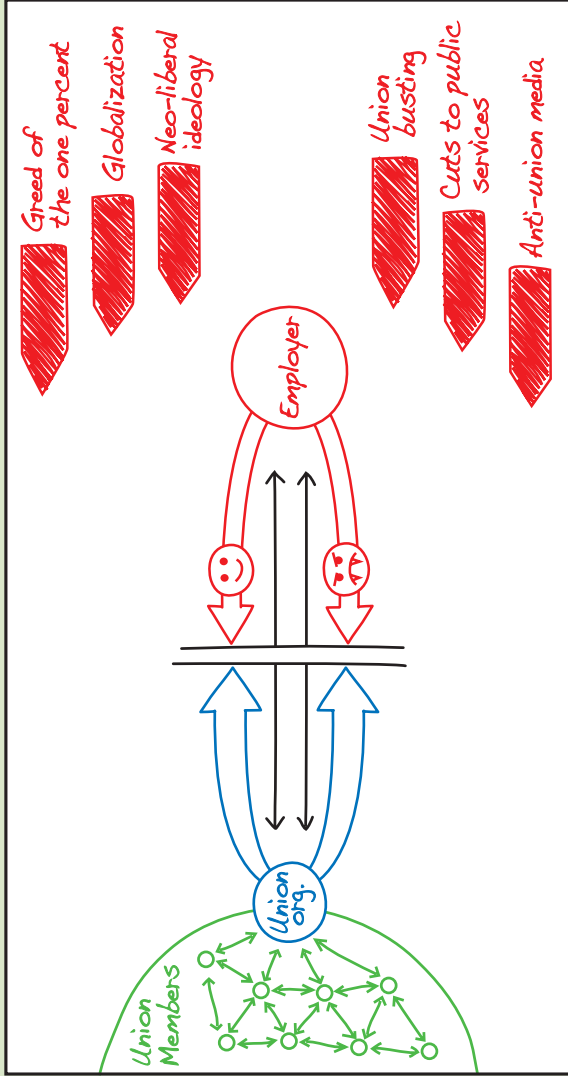
Step 5 – Overcome the disconnect with union members

Shift focus and resources to rebuilding a union structure which establishes face-to-face connections with union members. Reconnect with the power of the membership. Refocus on what is happening in the workplace.
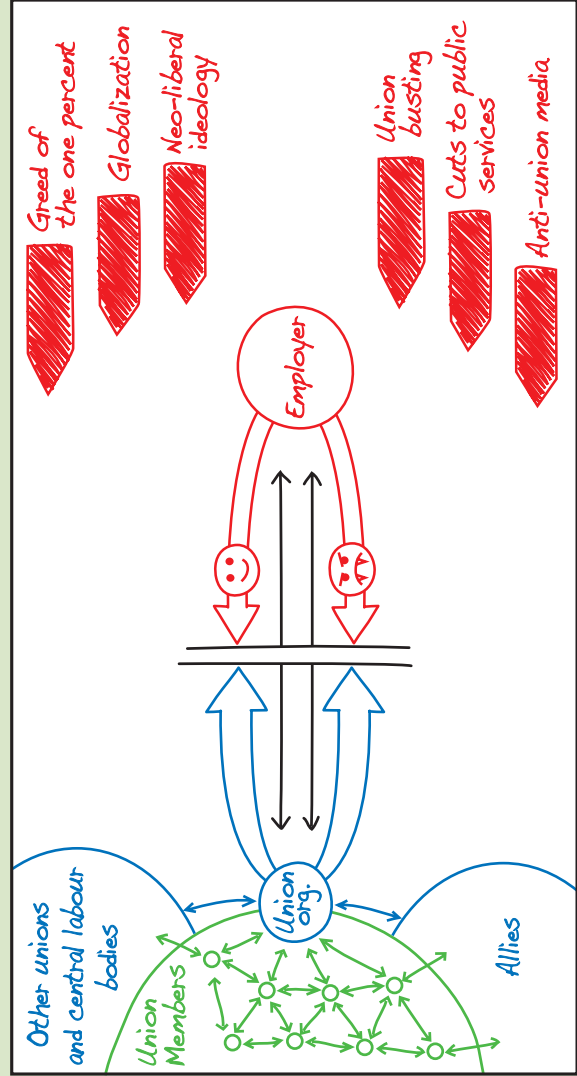
Make plans to engage the local executive board, stewards and union members in every campaign.

Step 6 – Strengthen ties with allies

Engage the entire union organization in building strong ties with other unions, central labour bodies and community allies.

Union members are the strongest link with community organizations.

Step 7 – Get into campaign mode

Launch workplace campaigns directed at the employer over issues like workload. Join existing community campaigns or help to initiate new ones. Tie workplace issues to community issues.
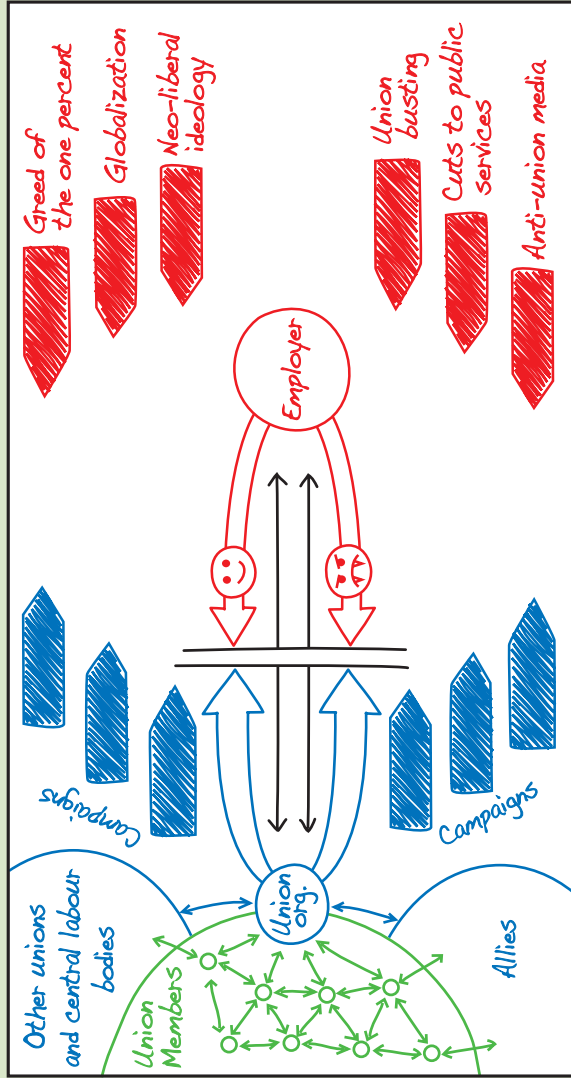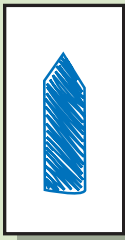
Achieve a state of readiness in your union

Make sure that the union is as ready as it can be for known and unknown challenges. Consider the suggestions in the Labour Council discussion paper *Achieving a State of Readiness*, available at labourcouncil.ca.

Leverage Targets

Leverage:

To increase pressure on our primary target, we apply pressure on leverage targets. This illustration shows possible leverage targets for a campaign directed at an employer.

Employer

- Customers/ service users
- Executives, owners/shareholders, directors
- Public/civil society
- Media
- Parent companies & subsidiaries
- Middle management
- Financial institutions
- Government & regulators
- Politicians
- Suppliers & vendors
- Other employers – same industry or market
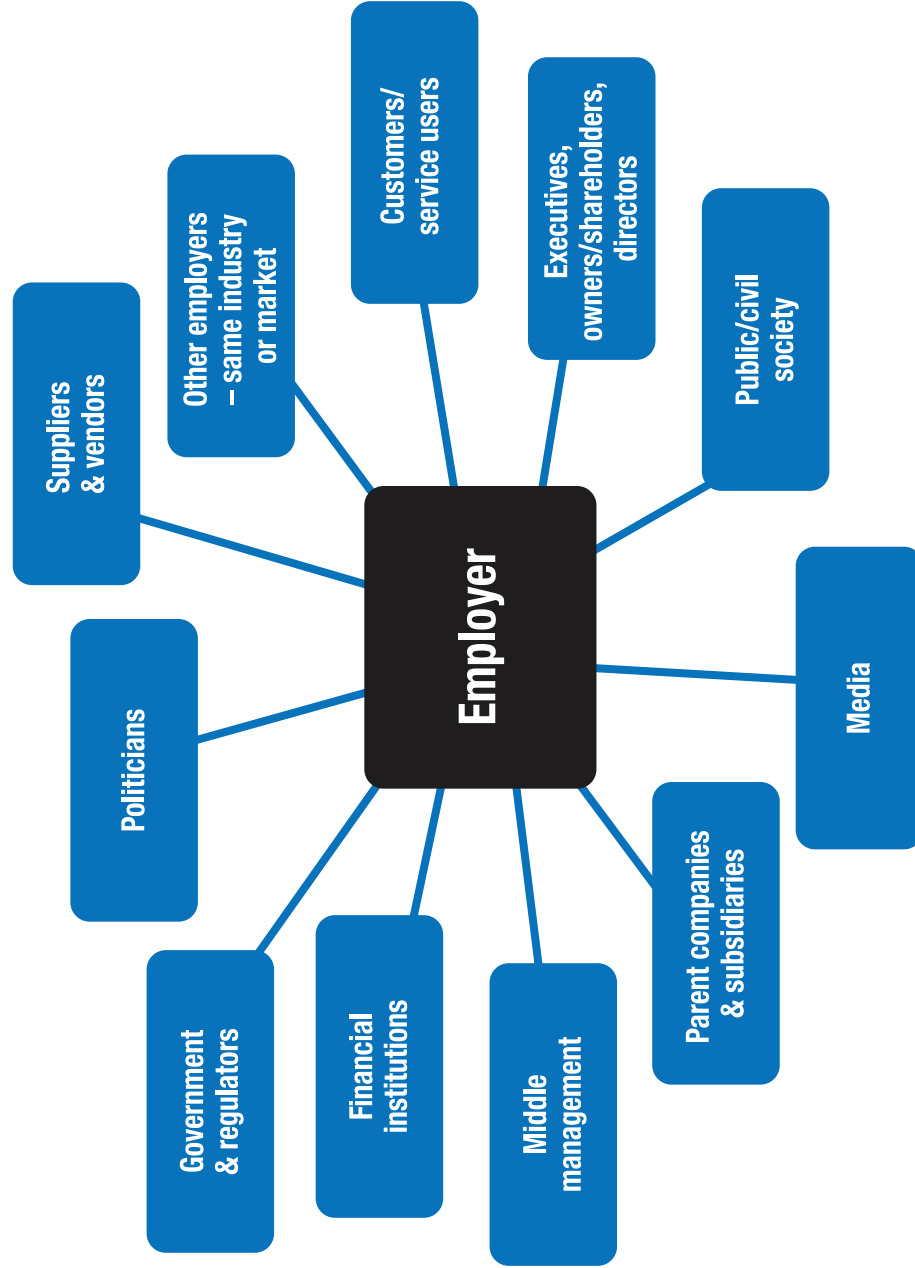
Source: Adapted by Fairley/Balkwill from *Strategic Campaigns* by Teresa Conrow and Andy Banks. (2002)

Spectrum of Allies and Opponents

Discredit and weaken leading opponents.

LEADING OPPONENTS

Active opponents

Passive opponents

Arouse doubts and conflicts within the opponents' camp.

PRIMARY TARGET

Secondary targets

Disrupt/expose the opponents' tactics

Unfriendly middle

Disengaged middle

Friendly middle

Win over the middle.

OUR ORGANIZATION & LEADING ALLIES

Apply pressure on primary and leverage targets

Passive allies

Active allies

Engage the active participation of the leaders and members of our own organization.

Increase cohesion and activity within the supporters' camp.

Source: Adapted by Fairley/Balkwill from "Spectrum of Allies" in *Training for Change* by George Lakey.

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About the authors

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Rob Fairley is the Director of Strategic Services at the Toronto & York Region Labour Council. Rob became a CUPE member in 1972 when he started at Toronto Hydro. He worked there as a labourer and as an electrician. He served as President of Local One for 7 years and served one term on CUPE's National Executive Board. Rob led the fight for ground-breaking equity programs at Toronto Hydro. Rob's speciality is facilitating strategic planning sessions for local unions. He has extensive experience organizing strikes and other campaigns – large and small.

Mike Balkwill

Mike Balkwill is a self-employed organizer and community development consultant. Mike has worked with grassroots community groups and non-profit organizations in many sectors: housing, health, community services, and environment. Mike organized successful campaigns to stop the development of an incinerator for radioactive waste in Brampton, Ontario. He also organized the successful campaign to remove mould from school portables in Peel Region. Mike has taught courses in community organization and social movements at McMaster and York universities. He is the publisher of *Pragmatics of Community Organization*.

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Visit www.campaignorganizing.org for:

- Facilitation notes and worksheets for some of the Handbook's exercises
- Digital copies of this Handbook, the State of Readiness discussion paper and translated materials.
- A Powerpoint presentation of Appendix 4