

Campaign Planning 101:

Defining Your Goals

The purpose of organizing a grassroots campaign is to achieve a victory or “big win”—perhaps to pass a Climate Action Plan, defeat a local initiative, improve a General Plan, or elect a pro-environmental candidate to office. When you achieve the big win of your campaign, people receive something they did not have before and/or someone who has power agrees to do something they hadn’t before.

Achieving such a victory starts with good planning, no matter what the scope of your campaign. Thoughtful planning results in clearly identified goals, strategies, and tactics that will guide your team and help you avoid pitfalls.

This handout will help your team answer two fundamental questions about your campaign:

- **What are the main conservation goals of your campaign?**
- **What are the main organizational goals of your campaign?**

Once you’ve answered these key questions, additional handouts on the Activist Resource Page can take your team deeper into the campaign planning process.

How to use this handout

This section has a short topic introduction, a list of questions to guide your group’s discussion, and a short worksheet that you can complete with your team.

A few recommendations to make your discussion session a success:

- **Set aside a good chunk of time**, around 60-90 minutes, so that the discussion is not rushed.
- **Gather together as many team members as possible** – people who care about the issue and are ready to invest in the campaign. *A good resource is [Doodle](#), a free online scheduling tool.*
- **Follow good meeting practices and etiquette.** Set some ground rules for the discussion, and make sure everyone has a chance to express their views.

Keep in mind: the best planning effort is not a “solo” endeavor, but involves a group of people who are committed to the goals of the campaign and who have a key role in the campaign’s success. If your team can successfully answer the key questions in this handout, you’re already on your way to achieving a “big win”!

Campaign Goals

Identifying clear goals is the first step to an effective campaign. The SMART model defines characteristics of well-crafted goals—goals that can keep your team on track and maximizes the impact of your campaign. A SMART goal is:

Specific – *Identify who, what, where, when, which, why.*

Measurable – *Identify criteria to measure your progress. How much? How many?*

Attainable – *Choose goals that may stretch your organization, but are still within reach*

Relevant – *Choose goals that are fitting to your organization, mission, and context.*

Time-bound – *Identify time frame and deadlines to keep you on track.*

If you are part of a group or organization that exists beyond the scope of a single campaign (e.g. a Sierra Club committee or team), then you will have two types of campaign goals: **Conservation Goals** and **Organizational Goals**.

Conservation Goals are the “big wins” you want to achieve for the environment and your community. You can have short-term, interim, and long-term goals.

- What are the short-term, interim, and long-term goals of your campaign?
- What do you want the public to demand and the decision-makers to deliver?
- What will you consider a victory or “big win”?
- How will you quantify your success?

Organizational Goals ensure that your group grows healthier and more effective through your campaign. With each conservation campaign that your team undertakes, your organization should emerge from the effort stronger, larger, wiser, and more visible than when you began. This will enable you to take on more campaigns in the future, and the cycle can continue.

- What are the overall organizational goals of your campaign?
- How will this campaign help strengthen your chapter or group?
- How will this campaign recruit and develop new activists?
- How will you involve current members in your campaign?
- How will you quantify your success?

Group Discussion

Imagine that your team has just achieved its “Big Win”—the goal you’ve been working towards all this time! What has just happened? What have you achieved? Envision your team in this moment of victory. How has it grown or developed?

Discuss these questions as a group, along with each of the questions above (*duplicated on worksheet, pg. 2*). Decide on specific goals for your team. You can record the answers on the worksheet provided.

Options to Consider

Brainstorm session: Get ideas on the table by brainstorming a list of potential goals. Next, hone in on those that seem most relevant. Perhaps one or two are natural compliments and can be combined. Once you’ve selected the winners, you can refine as needed.

Break-out groups: If you have a large number of discussion participants, consider brainstorming in small groups, then come back together to share out and refine.

Conservation Goals

What are the short-term, interim, and long-term goals of your campaign?

What do you want the public to demand and the decision-makers to deliver?

What will you consider a victory or “big win”?

How will you quantify your success?

Short-term	Medium-Term	Long-Term
E.g. “Stop the local authorities from approving the construction of this toxic waste incinerator in our town.”	E.g. “Inform all targeted public audiences that these facilities are hazardous to environment and public health.”	E.g. “Eliminate all toxic waste incinerators from the State DEQ Quality Assurance Plan.”

Organizational Goals

What are the overall organizational goals of your campaign?

How will this campaign help strengthen your chapter or group?

How will this campaign recruit and develop new activists?

How will you involve current members in your campaign?

How will you quantify your success?

Short-term	Medium-Term	Long-Term
E.g. "Recruit 3 new members to support campaign"	E.g. "Successfully encourage 1 promising member to take a greater leadership role"	E.g. "Develop core group of 6-8 people who participate consistently and support campaigns."