



# NWF Campaign Planning: Worksheet #1

**Welcome to the Campaign Planning Toolkit!** This tool is designed to walk leaders through a series of prompts and questions that can lead to a logical, informed plan for winning on issue advocacy campaigns. **No plan is perfect**, and you should never be closed off to making changes or adjustments to adapt to new information, shifting political events, shifting partnerships, or other changes. This may happen in the middle of the planning process, or six months into your organizing. By taking the time to create this plan, you will be better equipped to adapt to these changes swiftly and more effectively.

## Pre-Campaign Planning Session:

**Campaign Goal: What is the concrete policy outcome that will help achieve the vision? What is a win?**

This should be a concrete policy or organizing outcome. There may also be several goals achieved through this campaign on different time scales.

- **Goals:**
  - **Short Term Goal** (Example: Generate a significant number of bi-partisan co-sponsors on a House bill to support wildlife funding):  
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  - **Medium Term Goal** (Example: Pass a carbon tax): \_\_\_\_\_
  - **Long Term Goal** (Example: Solve Climate Change): \_\_\_\_\_

**Long-Term Organizational Outcome: How will this campaign also serve to build and strengthen your organization for the long-term? For NWF Staff: What strategic planning goals will be achieved through this campaign?**

Could be conservation and/or organizational goal.

Examples: Building the conservation army; Water for wildlife, Fundraising, Building critical partnerships

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**Strategy:** The broad categories of things campaigns do to persuade a person or group of people to do something that he/she/they is reluctant to do or are opposed to doing.

**In order to win on our campaign goal, what are the key levers that we need to influence?**



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## Examples:

- If goal is “Pass legislation that no one has heard of yet,” the strategies might be “build champions in congress” and “elevate the issue and the solution with the public”
- If goal is “Get a state agency to reject a permit” the strategies might be “influence the decision-maker(s) to do the right thing” and “build relationships within constituency or geography most impacted by permit decision”

This is an assessment of the best way to use our political power to win. You may need to deploy several of these strategies at once, but you should prioritize your strategies.

## Strategies:

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**Timing:** What is the length of this campaign? Is it a 6-month/1 year/5 year plan? Based on what a “win” looks like, how long will you need in order to achieve this, realistically? In terms of each goal (short/medium/long term)?

**Milestones:** What are the key moments on this campaign that we should be aware of?

*Examples: congressional or agency hearing, comment period, vote on legislation, bill introduction, other campaigns having big moments/opportunities for collaboration*

These are helpful to pre-identify and have available for tactical brainstorming at the Campaign Planning meeting.

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**Targets:** A key decision-maker who we are attempting to influence on our campaign. This can be a Member of Congress, the President, a Governor, a State Legislator, a State or Federal Agency head, etc.

This conversation is both about the *inside game* and the *outside game* -- meaning, both about lobbying or grasstops *and* about field and the grassroots. First, identify targets who are critical in order to win your campaign goals. Later in the process, you may make determinations about whether to move this decision-maker through lobbying in DC or the state house, a field program that engages their constituents, or tactics that are focused on media or online. The point is, at this phase, you do not need to make all of those decision,



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but rather really work to identify those targets who are most critical for a win and we are most able to influence through one or more of these strategies.

In some instances, this will be obvious and will not warrant a long discussion. In other instances (like federal campaigns with multiple targets in the House and Senate), this may be the most critical part of your campaign planning.

## **Step 1: What factors or criteria will help to strategically identify the most impactful decision-maker to target?**

*Examples of criteria you might use for identifying targets:*

- *Who is important/influential for a win?*
- *Who has existing priorities or politics that fit with this issue?*
- *Who represents important congressional districts that we want to target for organizational or movement building reason? Presidential or battleground states?*
- *Who sits on committees that have jurisdiction over this issue?*
- *Who is likely to be a strong champion of this issue based on their voting history and/or their willingness to champion similar issues in the past, the importance of the issue to their state/district?*
- *Where are the states, regions, constituents that are most impacted by this issue? Who represents them?*
- *What state or region would our organization like to invest in because of broader, "movement building" reasons?*

## **Step 2: Use this criteria to identify universe of potential targets**

**Targets:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**Invitation:** Before you hold a planning meeting, you should establish your invitation list and make sure that key folks have a seat at the table.

*Examples: Communications staff, Online staff, Lobby staff, Campaigns staff, Affiliate representation, Regional representation, Programmatic staff/experts, Other key constituency leaders? (education, sportsmen, tribal partnerships, magazine, urban initiatives)*