



Goals, Strategy & Tactics

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Succinct Definitions

SMART Goal: The specific, measurable, achievable, realistic, and time-bound outcome that you want to see in the future.

Strategy: Your pathway towards that goal.

Tactics: The individual actions that you will take to accomplish your goals.

Theory of change: Your assumption about how to achieve change using your goal and strategy, phrased as an “if... then.... because statement”.

1. Steps to Plan your Project

Here is an example overview of a process you could go through to decide and plan a team project:

1. Choose what community you are working in; for example, your school, neighborhood or another community your team is in. Here is a guide you can use to do this: [Influencing Change Through Communities](#)
2. Preliminary brainstorming:
 - a. Discuss your vision and values. Understand your team's shared purpose.
 - b. Research climate solutions, both local and global. Identify projects that are already happening.
 - c. Further local knowledge through community research.
 - d. Conduct [relational meetings](#) to deeply understand your community.
3. Consulting your community:
 - a. Brainstorm goals based on research and relational meetings.
 - b. Develop 2-4 project ideas that you decide upon as a team.
 - c. Consider creating and disseminating a [community survey](#) to see how much support the community has for your teams project ideas.
 - d. Collect surveys and any other feedback to help your team decide on a project goal.
4. Creating a project plan
 - a. Create a SMART goal.
 - b. Apply the Iceberg model to your goal.
 - c. Create a strategy:
 - i. How will you address the existing problem?
 - ii. How will you bring more people in to build power?
 - iii. How will you interact with power to create concrete change?
 - d. Plan your tactics.
5. Take action through your project!

2. Vision

Your team's vision is your ultimate picture of the world you want to create. Your vision is created and shaped by the values you hold. Your team's vision of the future is most likely aspirational, something you hope the world achieves. For example, since your team presumably shares the values of justice and liberation for all people, your ultimate vision would include a world free of racism, sexism, colonialism, and other forms of oppression. Your vision could also be more specific: for example, the return of land to Indigenous nations. Your values shape your vision, even if it's not done consciously. If you haven't done so yet, explore your team's vision with the Visioning Exercise in the [Shared Purpose Guide](#).

You don't need to write your full vision out explicitly, but it is an important concept to understand for a number of reasons:

- ❖ It is important to reflect on your big picture vision to provide context for the daily work you want to do. It can be easy to lose sight of how exciting the world we're trying to create can be when we're engrossed in chipping away at one small part of that vision.
- ❖ It is also important to recognize that you can agree on a vision while disagreeing on which goal is most strategic to pursue, and which strategy is the best way to get to that goal. Sometimes, groups and teams get into conflict when they don't recognize this. In organizing, your team works towards the vision that you all consider to be right and good, but disagreement about which goal to pursue can easily turn into accusations of being a bad person. It is really important to be able to differentiate between disagreements in vision or values, and disagreements in strategy. Remember, strategy is what an organizer rationally thinks will be the most effective way to achieve a world based on your values.

2.1 Vision and Anti-Oppression

Your team's vision is the ultimate vision you have for the future of the world. It is an incredibly powerful task to imagine a different world. As you will have learned throughout your project, integrating anti-oppression, intersectionality, and anti-racism is critical to achieving inclusive, global change. This means that a robust and representative vision should have considerations for how to meaningfully include historically marginalized communities, uphold inclusivity and

anti-racism, and integrate anti-oppression. The climate action movement cannot succeed without actively employing anti-oppression and intersectionality approaches and tools in their visions for the future. As such, it is important to have open, honest, and vulnerable discussions about your vision with your team.

In addition, it is important to discuss your team's anti-oppression values and to connect your values to your vision. These conversations may be uncomfortable and awkward, nonetheless, they are crucial. If your vision doesn't include elements of anti-racism or anti-oppression, ask yourselves, why? If your team doesn't have any members from minority communities, research and be open to integrating the goals and dreams for the future based on BIPOC peoples' interests. This should be done with careful consideration. Discuss with your team with the reflection questions below. If you need further clarification on why being careful not to cherry pick from BIPOC values that only align with your own, read the [Being an Ally](#) section in the Reconciliation Education Guide.

Team Reflections

- ★ Ask yourself who is included/excluded from your team's vision?
- ★ Who benefits the most in your idealized version of the future?
- ★ Do BIPOC communities have self-autonomy?
- ★ Are our values heteronormative, western, capitalist etc.,?
- ★ How central are intersectional, anti-racism, and anti-oppression considerations to your vision?
- ★ Which BIPOC communities are you researching? Are you only choosing ones that align with your interests or are you looking at others?
- ★ What made you decide which BIPOC communities to research and include in your vision? Why not a different community?

To have a solid foundation with your team you need to create and cultivate a shared purpose, which feeds into your personal and teams vision. To learn more, check out the [Shared Purpose](#) guide.

3. Goals

This section discusses how mountaintop, nested and SMART goals are an effective way to plan projects and achieve the visions your team wants to achieve. Keep in mind this is not the only way to do so, but a tried and tested method among community organizers.

3.1 Mountaintop vs. Nested

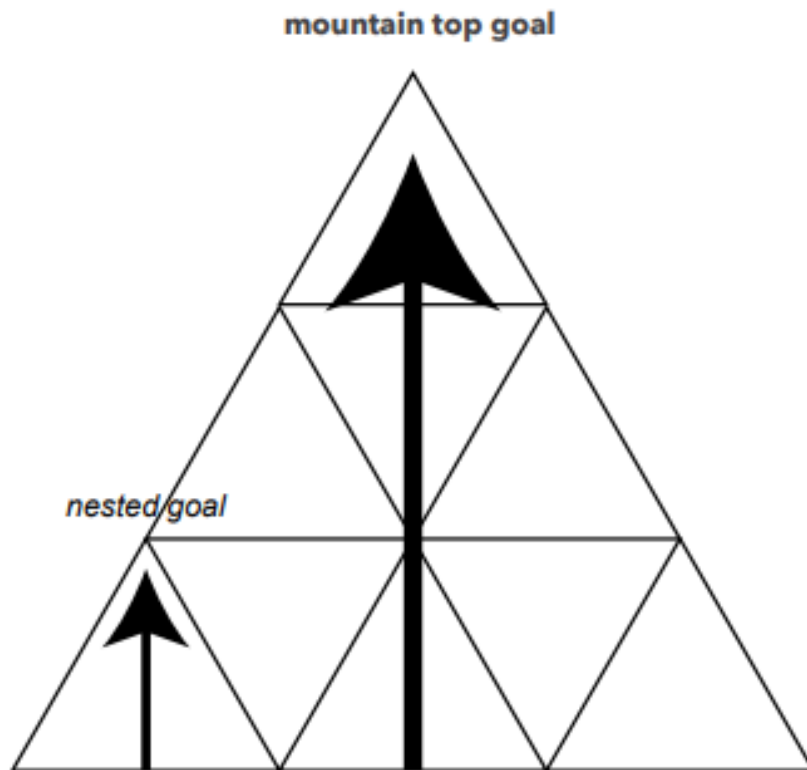
A goal is an outcome you want to achieve in the future. It is something to strive toward for the vision your team sees to become reality. When the team decides its shared purpose, the goal should fall within that. So if your shared purpose is creating more communities built around active and shared public transportation, it wouldn't make sense to then make your goal focussed on getting more electric vehicles for individuals. That doesn't tie into your team's shared purpose. Where your shared purpose is an ultimate *vision* for the future, your goal is one milestone to achieving that vision. One vision might encompass many goals, but you will only be focusing on one. By having one goal, it allows you to take realistic and time bound stepping stones to achieving something that may seem massive at the offset. How you actually achieve the goal changes and is up for debate and discussion, because there are many ways to do it. That's where strategy comes in, and that is discussed more [below](#). Goals then, are how you get past the grief and inertia that people so often experience with large systemic problems, like climate change, by making them manageable for your individual capacity and for the teams.

Example:

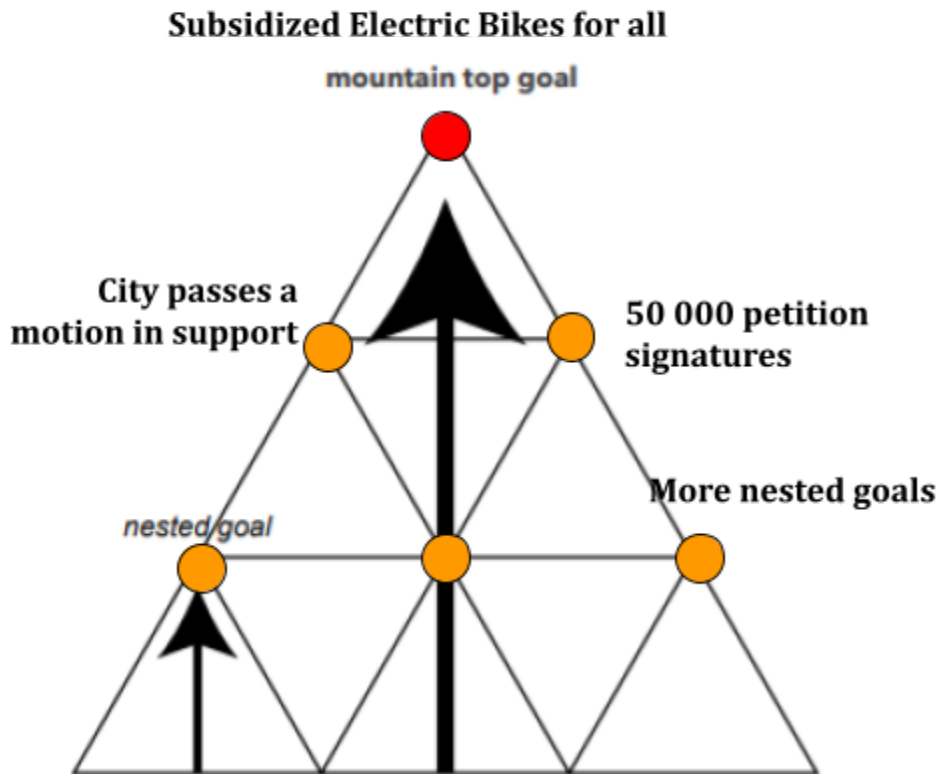
- ❖ Vision is for every single person to have access to safe, affordable, efficient, and emissions-free transportation
- ❖ A mountain top goal is for the province to fully cover the cost of an electric bike for any person who wants one.
- ❖ One nested goal is to get 50 000 signatures on a petition calling on the government to do this.
- ❖ Another nested goal is for your city to pass a motion calling on the province to do this.

There are different types of goals and different ways to categorize them. The two ways you can look at goals is by categorizing them as *mountain top goals* or *nested goals*. A mountaintop goal is often vast, broad and general. It is a goal that you are

actively working towards achieving, and is meant to be worked on throughout your team's work. An example, if your shared purpose was creating more communities built around active and shared transportation, your mountain top goal could be to get the province to fully cover the cost of an electric bike for any person who wants one. That goal is still large and hard to create clear actions to achieve, so creating a nested goal to help achieve that larger goal is important. A nested goal, is a smaller, more specific and achievable goal as a stepping stone to your mountaintop goal.



Here is an example of how the mountaintop and nested goals fit together:



As goals begin to fragment and spread down the chain, you will notice that it takes multiple goals to meet one singular larger goal. This can become complicated quickly and it is important to understand how change works in the world. As changemakers, it is important to remember that not all these goals have to be you or your team accomplishing them. When you are working towards goals, such as climate action, you are working against systemic norms and large worldwide issues. These goals are radical, so remember there are many teams out there working for change just like you! Everything doesn't rest solely on your shoulders. It's important to remember this so you don't burn yourself out. For further information on burnout and self-care so [Setting Boundaries & Regenerating](#).

3.2 SMART Goals

There are different goals you can set for yourself and your team, and they might have wildly different structures. The one most helpful to use in project planning is creating a SMART goal. This is often used in a business setting, but works very well for community organizing. A SMART goal is an acronym standing for: specific,

measurable, achievable, realistic and timebound. This acronym is a tool to ensure your goal is useful and meaningful. All goals you make with your team, whether mountaintop or nested goals, should be SMART goals.

Structuring a goal in this way is important, because it means you have thought through all the variables that will actually make your goal fit your team's capacity. Think about a goal you've set in your life before, an example being, "getting enough sleep". Did you actually do the goal? Why or why not? A SMART goal ensures you have specific actions and safeguards within the goal itself to ensure it can actually get done. If you had said, "I'll get enough sleep by next week by going to bed by 9 p.m. on weekdays", you've already set yourself up for success because you have given yourself boundaries on how to achieve the goal.



When finding and creating a goal with your team, you want to ensure that your community is actively engaged in the goal-making process. You don't want to think of any amazing goal with just your team, go out to achieve the goal and find that no one in the community wants to help you. If the community is not bought into the goal, it will flop. That's why finding a goal from within the community itself will be building a goal within a vision the community has already built, and has yet to achieve.

Try to imagine your team's goal is to push a rock up a hill. There are multiple rocks everywhere, some at the bottom of the hill, some stuck under fallen trees and debris, and a few half way up the hill. The easiest thing for your team to do is to push the rock that is already halfway up the hill, because half the work is already done for you. Think of this analogy like the goals within your community. If you're the only group pushing the rock from the bottom to the top, it will take a long time,

and you might not have enough people to even push it all the way. The goal already near the top of the hill will probably be within your capacity, and who knows, a few friendly community members will probably join to help you get it to the top.

Agreeing on team goals is much easier after devising your teams' vision for the future. As mentioned above, goals are broadly categorized as mountaintop goals and nested goals. An important element in realizing team goals is ensuring they are inclusive of the interests of marginalized groups, too. While drafting a vision is easier, the process of identifying team goals will unmask that different goals may intersect and/or interfere with other interests. How will your team address balancing varying and, at times, conflicting goals? How will you prioritize these goals? Finally, when devising team goals, be sure to pursue current or future goals that BIPOC communities have already started or are working towards.

3.3 The Steps to Create a Goal

- ❖ Cultivate a shared purpose before looking for a goal.
- ❖ Conduct safe community outreach to find a goal already being talked about and/or addressed in the community.
- ❖ Understanding the difference between a mountaintop goal and nested goals and where your team's goal could fit.
- ❖ Ensuring all team members make a decision on the goal for your project.
- ❖ Create SMART goals for both mountaintop and nested goals to ensure they are winnable and measurable.

3.4 How to Choose your Goal

→ USE WITH: [Relationships in Organizing](#) & the [Community Survey Guide](#)

In choosing a goal you will need to ensure that not only your team agrees, but that the community is on board with the goal as well. A goal that isn't backed by the community is a goal that will have a lot of resistance, and will likely not succeed.

Have a team meeting to go over possible goals created based on community research using the following step-by-step process:

Step 1 - [Debrief your relational meetings](#)

After having relational meetings with at least 10 people, bring all the notes to the team meeting. Have everyone share a quick debrief on: how the meetings went; what important information you were given; and, any problems and/or solutions being talked about. As this is happening the facilitator, or note taker, should be writing down the main points on a board or adding sticky notes to a large sheet of paper so everyone can see them.

Step 2 - Finding Common Problems

Next you will be grouping all the problems and/or solutions that correlate to each other. This could be done either with one facilitator and the team gives guidance, or the team gets up and actively separates things and groups them together. This could look like grouping every problem that involves bikes together, or grouping every problem that deals with transportation together and not separating it out by which mode they take.

Step 3 - Where is the Power?

You will need to decide which of the grouped items that represent different problems and/or solutions have the most community support behind them already, and narrow it down to three potential problems and/or solutions. There is no right or wrong way for this conversation to go, only an exploration and deep listening to see all the possibilities that exist. One way you can organize this is by ensuring everyone in the team goes around and has a chance to speak about the grouped items that have the most power behind it, or you could decide based on how many community members brought it up in the relational meeting. Deciding based on the power could be from a number of different angles, and this will entirely depend on your discussion as a team what you hold to be the most valuable. Power could include community support or momentum, and this could be based off of how many people brought it up during the relational meetings (by simply counting the number of times it was brought up) or it could be that a decisionmaker was pushing for it heavily. Deciding on this decision is fluid and will depend on how the discussion plays out.

Step 4 - Pick Three to Four for a [Community Survey](#)

Come to consensus on, and create three goals based on identified problems and/or solutions discussed in your relational meetings. Where the power lies in the

previous step (Step 3) will help lead you to choosing these three goals. You will be putting this in a community survey to garner widespread public feedback.

Step 5 - Community Feedback

Once the community has filled out the survey, then you can look at the results. The results should tell you the community members' opinions and thoughts, and give you a main problem or solution they have tried to and/or are trying to address. This is important because it helps cultivate acceptance by the community of your goals and ensures your goal isn't going against what the community's vision is. Decide as a team which problem to tackle based on this feedback.

Step 6 - Create a SMART Goal

When you've decided which problem to tackle you can begin crafting a SMART goal as a team.

4. Strategy

Once you've done deep community research and chosen a SMART goal, you need to find a plan to achieve it. Strategy, in simplest terms, is a general plan to achieve your goals. If the goal is the intended outcome, then the strategy is the route you take to reach that outcome. It is not choosing actions or events to do, those are considered tactics, and can only come after you've decided the strategy.

In the image below, if your goal was to get to the X, what could your strategy be? Although it suggests the strategy is to take the river, that's not the only route you could take. You could take the dessert or take the mountains, and both could be the strategy you choose. When you discuss strategy, there is no *one* strategy, but instead multiple, which is why it can be hard to discuss and decide on a final one as a team. It might even be the case that deciding on a strategy means you choose to have multiple strategies to achieve your goal. Sometimes that is necessary for your outcome.



4.1 Combining Strategies

An example of how this can be done is looking at a previous campaign. The campaign overview document is below.

Purpose:	To demonstrate that a street is a place for the community and not for cars. To reduce GHG emissions by turning an existing roadway into a pedestrian walkway and community gathering space.
SMART Goal:	Get the City of New Westminster to make Columbia a car free street by the end of 2020.

Theory of Change:

[\(Info on this can be found here\)](#)

If we show there is public support for a car free street,
than the city council will build one on either Columbia or 6th & 6th Street,
because the public opinion now aligns with councils' goals and values.

If we show there is business that supports for a car free street,
than the city council will build one on either Columbia or 6th & 6th Street,
because business stakeholders are valued by the council.

Strategy:	Tactics:
Show city council there is public support for a car free street on Columbia street.	Find allies: reach out to stakeholders and set-up relational meetings to see if they could be allies.
	Get letters of support from stakeholders.
	Petition - start canvassing at key festivals and community events.
	Emails & Media: send letters to the editor, post op-ed, post social media blasts, post info on website on campaign (e.g., videos, pics, inspirational and educational).
	Car Free Columbia Street designs: Reach out to any local artists for art concepts on Columbia St. being car-free.

	Educate the Public: presentations on what a car free street can offer to New Westminster.
	Get the public to write letters and speak to city council in support of a car free street.
	FINAL BATTLE: get people out to city council when an important motion is brought forward regarding car free Columbia St.

Show city council there is business support for a car free street on Columbia street.	Reach out to form allyships with local businesses directly impacted by Columbia street or 6th & 6th St closures. First by email, then by petitioning.
	Get endorsements letters from businesses.
	Get supportive businesses to display car-free art work and/or posters of support.
	Get businesses to write op-eds in newspapers.
	Get businesses to show up for the city council decision meeting and bring any employees willing to go.

4.2 Deciding on Strategy

To begin the strategy process, you first must discuss these questions with your team:

- ❖ Do we have the power to achieve our goals on our own or will other people be involved in the decision-making? Who else will need to be involved?
- ❖ Do we have the resources, time and capacity needed to accomplish our goal? Will it cost money? Require capacity? Take time?
- ❖ What permits and regulatory requirements stand between us and our goal?

Next you must find the different strategies you can take to get to your goal and assess the most promising one. The best way to make this decision is by talking to

people in your community, and if you have already done so, looking back over all your notes and assessing the different problems each pathway might face.

You must understand each strategy based on all the community research and information you have collected to be able to make this decision.

Your team must gain information on the following questions to help inform and develop a strategy:

- ❖ Who are the decision-makers?
- ❖ Who are your team's potential allies?
- ❖ Who are your team's potential opponents?
- ❖ Who will be impacted by this goal or strategy both negatively and positively? Why?
- ❖ Has your team spoken to someone from a different community who might be negatively impacted? How can they be brought to the table in a productive and healthy way?
- ❖ Why does your team think this strategy works? Why doesn't it?
- ❖ What is the biggest hurdle or issues with this strategy? What are the different ways it could go right or wrong? Think through each scenario and talk about all possible outcomes.
- ❖ How does your team get past those difficulties? If you can't, when do you as a team need to reassess our strategy?
- ❖ When your team makes their decision, are you doing so with an unbiased perspective? Have you considered diverse perspectives of community members from different social, economic, racial and cultural backgrounds?

An important thing to remember when you are connecting and exploring the different goals and strategies in your community is to do so with a *critically, unbiased perspective*. This means to do so with an understanding of how the goals, and potential strategies, will impact the community. Have you spoken to marginalized groups? (Marginalized groups are groups of people that experience discrimination and exclusion because of power imbalances in the economy, politics and cultures of the “mainstream” society.) How do they feel about the campaign?

When they bring up concerns, try to find a resolution or ask questions to understand the root of the problem.

You must bring these community members to your table and establish a relationship with them. In doing so, you've taken out what might be your greatest opponent, and you can begin healing systemic oppression that so often discounts large swaths of the population. This also promotes healthy dialogue and communication in your community. Even if that means choosing a strategy that is not as exciting for the team, you need to make this decision with as little bias as possible. Your projects should be moving forward in a way that is not just radical changemaking, but creates lasting community change as well.

4.3 Theory of Change

Deciding on a strategy and goals can be difficult and messy, but workshopping a Theory of Change statement makes it concise. The Theory of Change can be expressed through this structure:

If [Insert strategy], then [Insert goal], because [insert reason why your strategy will work].

In the previous diagram with the traveler choosing the strategy as their goal, they might have a theory of change that says, "If I take the river, I will get to my destination, because I know how to paddle a boat well and the river seems calm and safe."

Why is it helpful?

- ❖ Exposes weak assumptions;
- ❖ Finds the best strategy, but maybe not the only strategy; and,
- ❖ Requires reflection and tough conversations - if you have to write it in a sentence, it will take some work to get to that level of refinement, and the process of doing that will ensure your team is on the same page.

The 'reason why your strategy will work' is a crucial part of the theory of change. It is where you need to justify the strategy you chose. Why is that the best strategy to

take you to your goal? It requires you to articulate the assumptions you're making in selecting a specific strategy, allowing you to evaluate whether those are or are not accurate. You probably think that your reasoning and assumptions for a strategy is implied, but writing it out can help you identify flaws in it. Also, everyone on the team might have a slightly different Theory of Change and understanding of their reasoning and assumptions for why a strategy will work. By talking about the 'reason why your strategy will work' as a group, it will help you make sure that you all have as much of a similar understanding of what you're doing as possible, which will help avoid conflict later on.

A Theory of Change statement, and your team's strategy, must be revisited and redefined over time. Once you begin working on your project, you may find it is more difficult than expected, or there were unforeseen challenges along the way. For example, going back to the traveller example, if the traveller paddles down the river and their boat sinks, or there are rapids in the way, they can go back to shore and choose to take a different route.

A Theory of Change is a theory in the true sense of the word - it is, as of yet, untested. No one else has successfully made the specific change that you are trying to - if they had, then you wouldn't need to make it! That's the challenging part of changemaking - there's no specific instruction manual that you can make and give to everyone. You need to learn from what Theories of Change people have tried in the past, and then make your own plan, try them out, observe carefully whether they work, and then adjust and try again. It is often trial-by-error. The process of refining a plan, project or process in response to feedback is called **iteration**.



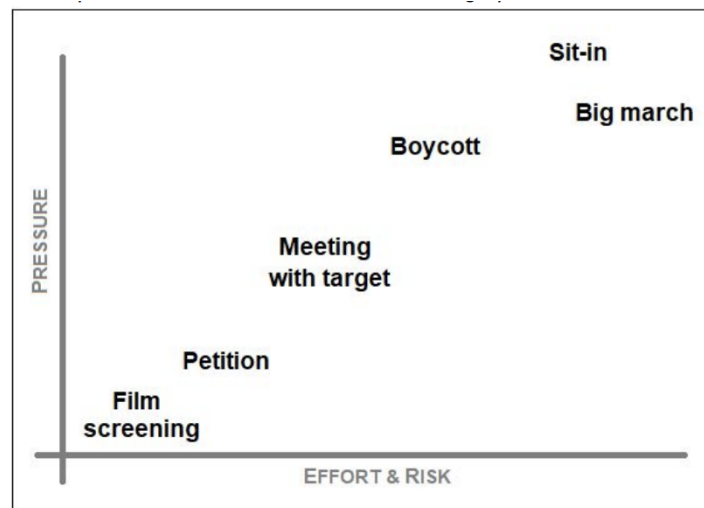
Creating a strategy is an **iterative** process. There is a popular quote that states, “Insanity is doing the same thing over and over again and expecting a different result,” and this is subverted by using an iterative process.

Success in changemaking comes from very intelligent adaption, which consists of frequent reflection and course correction in the face of constant change. Adrienne maree brown asks, “how do we practice increasing our ease with what is? Change happens. Change is definitely going to happen, no matter what we plan or expect or hope for or set in place. We will adapt to that change, or we will become irrelevant” (Emergent Strategy, 69-70).

4.4 Power Over Vs Power With

It is important to consider how the process of goals, strategy, and tactics looks different depending on the type of changemaking you are doing (keep in mind, tactics are the actions you take to achieve your goal). You can think about the difference between a “power over” project, and a “power with” project. Knowing which type of power your project is using is important to understand where you are aiming your power. Is your goal to aim power at a decision maker, or is it to aim power at another target?

A power over project involves interacting with a figure of authority to solve a problem, usually with the goal of influencing them to make a specific decision. In a power over campaign, citizens organize to build power to disrupt the power of the authority. They create a strategy about how that authority’s power can best be disrupted, and hold tactics/actions of increasing capacity and risk, and thus put pressure on that decision maker to demonstrate the power they built. Here is an example of escalation:



In this diagram, each action taken is increasing in the teams capacity as well as how “risky” the action is. Risk, in this case, means how public the activity is and how confrontational it is to the decision maker. As both effort and risk increase, so too does the pressure on the decision maker. It needs to increase slowly over time as opposed to just hosting the riskiest or highest effort action, as you most likely will not have enough people power to achieve that action effectively.

A *power with* project, or a collective action project, is one that doesn’t require interaction with a position of authority. It consists of building power together to implement your own solutions to a problem. It is instead a grassroots project with change done at the local community level without relying on political figures holding all the power to make the goal happen. This solution could be one that directly reduces emissions, or one that focuses on changing worldviews, or a combination of the two.

For example, the UBC Youth Climate Ambassadors Project was organized by a group of UBC students to deliver climate justice workshops to Vancouver high school students. Their goal is to educate students about climate justice, help them talk about their existing feelings about the climate crisis, and help them learn how to take action. This project was initially organized outside of the school power system - creating the workshop didn’t require pressuring an authority to say yes to a decision.

4.5 Using The Iceberg Model

The most effective strategy will be one that affects change on the deepest level possible. One way to ensure that your project is tackling the deepest level of systemic change as possible is to use the systems thinking iceberg model, which you can learn about in this video: [Systems Thinking Video](#).

Deeper change is more effective for the same reason that weeds need to be pulled out by their root to properly be removed. If your project only changes a behaviour, or even a pattern of behaviours, then that's like removing a flower or a stem of the plant. It will keep growing back until you pull out the roots - change the structures in the community, and create a new story to challenge the existing harmful worldview paradigms.

Think about whether your goal is trying to change a behaviour, pattern, structure, or worldview paradigm.

Then, think about all of the deeper layers that are currently preventing that goal from happening.

Now, strategize about how you can change those layers.

For example:

Say that you have identified the problem that new homes in your city are being built with gas-burning furnaces - one of the main contributors to greenhouse gas emissions in most buildings. You're thinking about selecting the strategy of tackling the lunch takeout containers, but can't figure out how.

You apply an iceberg model to this problem, and realize that your goal, as written, is mostly pattern-level: your goal isn't to change a structure in the school, although that could be part of your strategy. The problem of lunch takeout containers is a pattern (and it is good to recognize it as deeper than a singular behaviour).

You need to think about the structures and worldviews that underlie this pattern. One structure is that the cafeteria only offers lunch in plastic containers. Another is that the school admin offers lunch in plastic containers because it is easy and convenient for them. Why is that? The worldview paradigm is that all the local suppliers of the food only sell plastic packaging, and do not provide zero waste

alternatives. Another worldview paradigm might be that all the food is not locally sourced and is shipped from far away, therefore it is packaged in plastic to be lighter during the shipping process. Societal structures and paradigms hold these patterns and behaviors up, making it difficult for your school to have zero waste options.

5. Exercises & Worksheets

5.1 [What is Strategy?](#)

Purpose:

- ❖ The team will be introduced to strategy compared to tactics and goals.
- ❖ The team will have to work together to find the best strategy.

Time: 10 – 20 minutes

5.2 Systems Thinking

→ USE WITH: [The Iceberg Model Introduction video \(22:47\)](#) & [the Iceberg Model Exercise](#) (To better understand or research different paradigms, please use [the Worldview Paradigms Guide](#))

Purpose:

- ❖ To find the deepest level of change for the team's goals and strategies.
- ❖ To understand how your goal could deal with systemic change.

Outcome:

- ❖ A better understanding of the positive change you can make in your community and a re-evaluation of your goals and strategy to make this positive change at the deepest level it can be. This might include making your goal focused on a structure as opposed to a one-off issue.
- ❖ Choose a goal that is both within your capacity and at the deepest level you can go: whether that goal is focused on structural change or paradigm change in your community.

Time: 15 – 30 minutes

6. Tactics

→ USE WITH: [Project Strategy and Tactics Template \(with examples\)](#) & [Strategy Session Questions](#)

After you have decided and voted on a goal and strategy, you're ready to do the funnest part: deciding on your tactics. Tactics are the individual actions that you take to achieve your strategy that, in turn, achieve your goal. Tactics are simply

actions or events you do to achieve your goal. There can be many tactics within a single strategy, and they often have many subgoals and smaller actions associated with each. In the traveler's example, they might choose to swim, build a raft or take a boat to take the river to their destination.



Tactics are often the first thing people think about and want to plan once a goal is chosen. This is normal, but should be avoided. If your team decides they want to host a fundraising event without deciding why they need to do that, you will be putting in a ton of time and resources into something that might not be building power to achieve your goal. To ensure your tactic has strategic merit, you must first ensure you've decided on a strategy for your goal.

It's also important to fully understand the community with which you are operating in, so you can ensure tactics are directing your power to the appropriate place (this is why doing deep community research is so essential!). To ensure you don't find an incompatible tactic, you must first understand what the target of your strategy and goal is. In the example below, can you see why the tactic might not work?

Goal: Get an EV charger installed in Coquitlam

Strategy: Build public pressure on Coquitlam City Council to install an EV Charger

Target: Coquitlam City Councillors

Tactic: Write letters to the Member of Parliaments office in Coquitlam

The reason this wouldn't work is because a Member of Parliament (MP) is an elected official outside of the city council's jurisdiction. That means the city council probably won't even know the letters were written, and the MP will feel powerless to do anything for your goal. You would have used a lot of capacity and time for something that didn't help you achieve your goal.

Some tactics are:

- ❖ Organize an event: fundraiser, educational roundtable, community art
- ❖ Write an opinion news article in a local newspaper
- ❖ Hold a community potluck
- ❖ Meet with an ally or stakeholder
- ❖ Hand out flyers
- ❖ Collect petition signatures
- ❖ Get letters written from community members to an elected official
- ❖ Get creative! Tactics are fun and endless!

GOAL: BUS COMPANY AMENDS SEGREGATION POLICIES
STRATEGY: ORGANIZE SUSTAINED BOYCOTT OF THE BUS COMPANY



TACTIC: OFFER CARPOOLS TO WORKERS

6.1 Deciding on Tactics

Once you brainstorm a list of tactics together, you will have to decide which ones have the highest priority and biggest impact on your project, as well as plan logistics for how to make it happen. Go through the list below for every tactic you've created.

Discuss these questions as a team:

1. Is this the right tactic for our strategy?
 - a. How does this tactic fit into our strategy?
 - b. Where does this tactic fit (it can even be generic, like beginning, middle or end until you craft a timeline)?
 - c. Who are we trying to influence with this tactic? Will this have an impact on them?
 - d. Why is this tactic more impactful than another tactic?
2. Can we pull this tactic off? Does this tactic fit our team's capacity and skill level?
 - a. What is the goal for this tactic?
 - b. What needs to be done to make this tactic happen? What are the steps to achieve it?
 - c. Who is helping us (on the team or allies) achieve this tactic? What resources do we have? What skills do we possess as a team and what skills do we need to execute this tactic well?
 - d. What is the timeline for achieving this tactic's goal? How long will it take?
 - e. Do we have the capacity to make this tactic happen?
3. What does the action or event look like?
 - a. What exactly will we be doing (try to picture and make a step-by-step process of what people will do at this action, i.e. a brief agenda!)?

- b. Who will be mobilized or getting involved?
 - c. What is the messaging of this action?
 - d. How is this message conveyed?
4. What are the logistics of this tactic?
- a. Where?
 - b. When?
 - c. What?
 - d. Who?
 - e. Roles & Responsibilities?
 - f. Visuals and Materials?
 - g. Media (if needed)?
 - h. Following-up with people who come out (recruitment)

If you still have more questions, please [check out this event planning guide!](#)

6.2 Timeline

Creating a campaign timeline is a visual way to organize all of the goals, sub-goals, strategies, and tactics together in an order of operations. This shows you what steps you need to take before moving onto the next one. As you begin your projects, you will move from one peak to the next, with ebb and flow between what will take your capacity or require more team or community power. Knowing the order of operations shows you what you will be building up to, by expanding your teams resources, skills and community influence.

The diagram below is a typical campaign timeline (find on the next page, called A *Generic Campaign Timeline*). Each campaign will have a very similar looking timeline, with different tactics throughout. The easiest way to do a timeline as a group is to start at the end, which is your project goal, and then work backwards. By doing so, you can better understand all the pieces and capacity you will be building towards.

Imagine your final goal is to get a city council to adopt the Intergovernmental Panel on Climate Change's (IPCC) greenhouse gas emission targets and create a new climate action plan. As a team, discuss the questions listed in the Tactics section, such as:

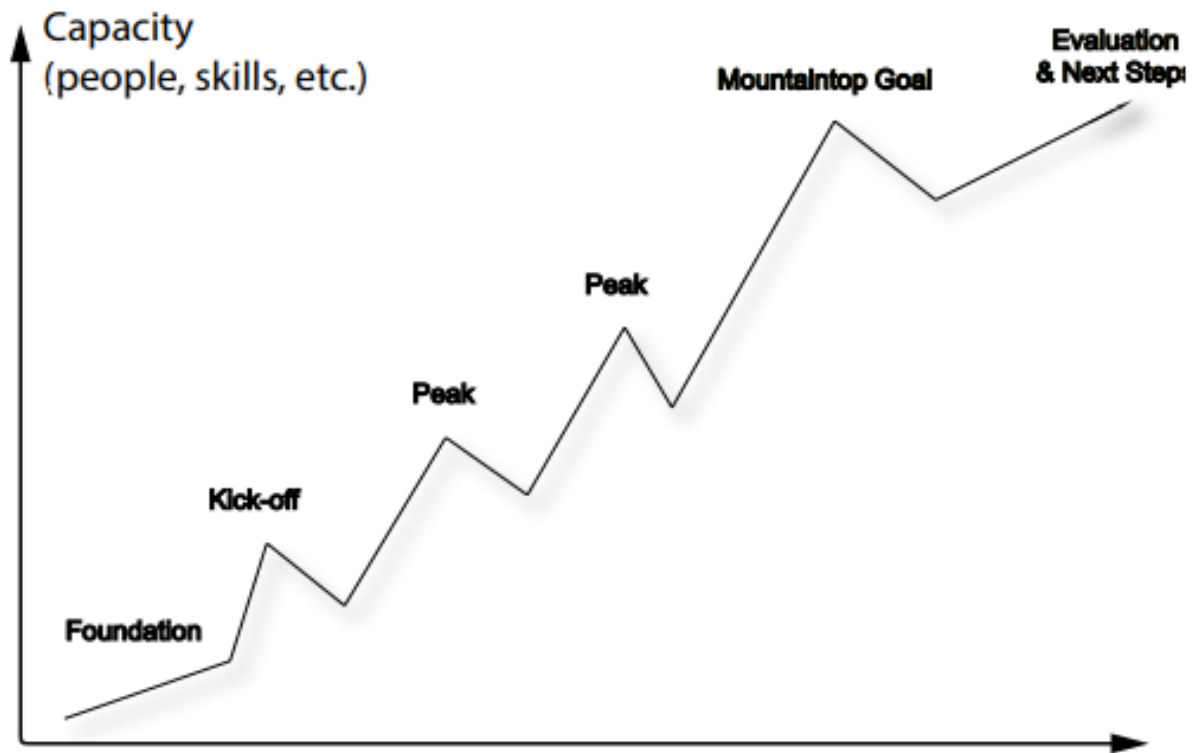
- ★ How many people do we want to show up?
- ★ How many people do we realistically think we can get to show up to city council?
- ★ How many people can we convince to speak?
- ★ How many people are necessary to sway councillors to vote in favor?

Other things you may need to ask are:

- ★ Do we need to contact the media beforehand?
- ★ Do we need our community to write letters? If so, how do we get them to do so?

This will inevitably lead you down the timeline backwards, as you begin to put in tactics to fill those needs. This is one of the easiest and most holistic ways to adapt a list of tactics, and can be one of the fastest ways to brainstorm and make a clear process for achieving your project goal.

A Generic Campaign Timeline



To feel more prepared, [here is a compiled list of all the questions](#) you need to know to have a fully formed strategic plan for your goal. Use these when creating your project timeline. It's important to note that this is only a starting point, and will be an iterative process that will be adapted over time as things change.

7. Going Deeper & References

7.1 Going Deeper

❖ [Take Action! Guide](#)

- Guiding questions for brainstorming project ideas

- It is not an in-depth guide to making an action plan, but it includes good SMART goals content.
- ❖ [Leadership, Organization, and Action Guide](#)
 - It is an in-depth guided process for how to complete strategy planning.
- ❖ [Organizing 101 Crash Course](#)
 - Sustainability teens training about momentum organizing and mass non-cooperation and goal-, strategy- and tactic- building.

Campaigns 101 is a resource that would be good to send to all team participants, so that you're all on the same page about language (e.g., tactic vs strategy) and that you're organizing with a people-powered view of social change. See link below:

- ❖ [Campaigns 101](#)