

**Nonprofit 911 – March 10, 2009**  
**Campaigns in Nine Steps: How to Succeed with**  
**"Just Enough" Planning**  
with Kristen Grimm  
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**Rebecca Higman:** Now, I am thrilled to introduce our speaker, Kristen Grimm. Kristen has extensive experience managing strategic communications efforts. As the founder and president of Spitfire Strategies, Kristen has helped hundreds of nonprofits find communications solutions to support their efforts, in order to create positive social change.

Kristen is also a frequent and highly rated presenter and author. She has written numerous publications for the field, including "The Smart Chart 3.0," "Discovering the Activation Point," "Breaking Through to Great," and "The Just Enough Planning Guide," which we're going to learn more about today.

So, without further ado, here is Kristen.

**Kristen Grimm:** Hi. Thanks so much for having me on the phone today. I'm excited to be talking about "The Just Enough Planning Guide." We, all of us on the phone, probably are, at one time or another, running campaigns or need to run campaigns. And we all want to have our man-on-the-moon moment and win something big. And to win, very simply, you need to plan to win. And sometimes you just get kind of caught up in what kind of process to go through to have a really effective campaign plan. So we wanted to look into this.

A commission had hired us to see if we could find a good way to tell grantees about the Moore Foundation, what some of the best practices were to follow to come up with a really great campaign plan. It should be noted that we looked at all kinds of campaigns. We looked at behavior-change campaigns. We looked at campaigns to pass ballot initiatives. We looked at campaigns to raise money.

So, at the end of the day, the idea was just, if you're going to try to make any kind of a campaign part of a candidate campaign, you need a process to go through. And when we looked out there to find what was already out there, we found there were kind of two options.

There was what we call the "war and peace" option, and there are some very extensive, very thorough, very good, but intimidating, campaign-planning tools. And most groups, when we talked about them, would say things like, "We just don't have time to do those. They're very intimidating. Hard to get a group around the table around those."

And the other was the exact opposite, which was what I call the "back of a napkin." And a lot of times, when you talk to organizers of very successful campaigns, you ask them how they come up with the campaign, and they're writing on the back of a napkin and they say, "Oh, I guess we just do this." But the problem there is that's their brain, and short of having their brain at your office, it can be hard to replicate that model.

We tried to look at a new way. And they sent out the address. You can go to [justenoughplanning.org](http://justenoughplanning.org) to find what we ended up finding. And what we found were there are basically nine steps to go through.

And I think what was great about trying to isolate these nine steps, and some of the key questions you needed to ask to get your written campaign plan, is that you can basically get this thing done in about two months, that with some good, aggressive meetings, you can actually do a plan for a full campaign. Which I think is nice to many organizations, because you want to on to the campaign, to campaigning, and not spending so much time constantly meeting at the table and rethinking decisions.

So I'm going to walk through, today, what the major stages are that you want to consider, and the key questions you want to ask, basically, at each stage, to just come up with a really good, really ambitious, very effective campaign plan. And then we'll take some questions at the end, so feel free to write up questions as we're going through these stages so we can answer any questions about them.

So the first is stage one. And this is where we really thought it's very important that you can decide if the campaign is possible. A lot of times, we've all been sitting around a table and we're actually getting going on a campaign, and we haven't asked some of those really key questions about whether or not it's a good idea to run a campaign.

And when we met with a bunch of campaigners and asked them what are some key questions to ask at this juncture, they mentioned a few.

First was, do you have a solution to a known problem? We've actually seen campaigns that get run really around a problem and not a solution. For a campaign to succeed, usually you have to have a solution. So a great example was for many years I worked on sweatshop issues. We really wanted to make sure that people didn't buy sneakers, say, from sweatshops.

But the problem was we were running a campaign and, in fact, we didn't have a solution. There were very few shoes that we could guarantee were not made in sweatshops. We were basically running this big campaign, getting people very excited to go and change their behavior and buy differently. In fact, there was no solution to it.

The exact opposite example of that are the people who finally came up with the carbon footprint. Many of you have probably gone to a calculator and even looked up your own carbon footprint to see what you can do to reduce your carbon footprint.

This is the way that people, like TerraPass, actually made it possible to do something about a problem. Up until then it was really hard in many ways, other than changing light bulbs, for people to get very involved in combating on an individual level climate change.

So what's really important as you all look at your issues is to say, "Do you actually have a solution to a known problem" That second part of that sentence is also really important, a known problem...

Again, when you're running a campaign, it's really important to know, as you're pushing your solution, that it is, in fact, a problem. That people view it as a problem and that there's some urgency behind it if you are getting them to try and buy differently or wear their seatbelt or pass a certain law. So that's really important to keep in mind.

Other questions that we really thought was, is this the right time? We all know there's really good reasons to consider campaigns and not campaigns. For many of us right now with state budgets, we're having to look really hard and see what exactly is possible, as far as running a campaign?

There was a group out of California that had decided to try and go after phthalates in toys--very bad chemical. They really wanted to get rid of these toys and they were moving legislation. Suddenly, just as they were getting ready to go, all of the toy recall was happening out of China. Suddenly there was a mass amount of education. Parents were very concerned. They were really able to take advantage of that timing.

We all know, too that sometimes timing isn't on our side. That, in fact, when, say the administration just changed, some of our issues became really hot and some of our issues became really not hot. And really being able to realistically look at that and see if now is the time to run your campaign.

The other thing is that sometimes we actually have to consider when people make decisions. When you work with groups who try and make sure that fertilizer, for example, doesn't get put onto lawns and run into waterways. You really need to think about well when do people fertilize? So if people fertilize, for example, in the fall. Now you already have to think about well, that's really got to drive your timing.

The other thing is where do they make that decision? And people oftentimes aren't making decisions just when they're walking down the street. So delivering a lot of messages when people basically aren't making that decision is also not good timing. You really need to consider could you be running a campaign inside a hardware store, which is generally in the fall, when people will be making that decision. If you can't, then you need to think about if it's really possible to run a campaign.

There's a bunch of questions in the guide. I'm just highlighting some of them for all of you to think about. Another really good question is to really consider why the opposition is not going to kick your butt. So if you're in a position where your issue is actually one where the opposition is pretty strong--and I, by the way, consider apathy to be opposition--you really need to be able to forecast out and say, "Why is it that we think we're going to be able to do this?"

We've seen really successful smoke-free initiatives go through a lot of cities. Many of us are able to now go to restaurants and bars and enjoy a smoke-free atmosphere. But you know that for the first couple of cities, there was real, real, real opposition, and there continues to be now.

There is hope for those groups, that they kind of now know how to deal with the tobacco industry and they know how to deal with restaurants and businesses who are going to oppose it, thinking that it's going to hurt their bottom line. Now they can have much more confidence going city-to-city.

But sometimes you just don't know. There's also been a number of state ballot initiatives where people have tried to increase the tax on alcohol. And you would think, well, that's just kind of like cigarettes. But it's not playing out that way.

In fact, each time that they've tried to bring it up and raise the cost of the tax on alcohol, saying that it does reduce alcohol-related deaths, it has actually gone down. So the opposition has really been able to position that as not a Sin Tax, but a very unreasonable tax and they've not been very successful in passing those. You'd want to really stop and think if you can do it.

What we saw recently--once Obama changed--I saw a really interesting article in the Washington Post that showed me that this is what different groups do and pro-life groups. There's a big article about how, based on the change in administration and the political climate, there were actually going to be, some of them were going to be shifting their focus from a ban to reduction.

So a number of them were talking about how they weren't going to try and bring a lot of cases to the Supreme Court or other court cases that they felt like they were not going to be able to overturn Roe V. Wade under the current political climate. They are, instead, were going to focus on behavior change and reduction. That's a really key strategic decision that they decided, based on looking around and seeing what campaigns seemed to be possible or not.

So the first stage that we asked everybody to do is to look at these questions and truly decided is the campaign possible? And do you have some real good rationale. Because we all know that campaigns take a lot of time and energy. We could lose them. We really want to make sure that we're making a good decision about a campaign--now by us, putting the resources behind us. So that is stage one.

Assuming that you all check that and say, "Absolutely, let's keep planning, " then you want to go to stage two. And stage two is the basics of all strategic planning. We all know this. That is that you have to set a clear and measurable goal. Campaigns seem to be particularly hard to do this with, and it is critical. I always call it the good, the bad, and the ugly.

The good, to me, is when someone gives me a lot of specificity, like pass a statewide ballot initiative in November of 2008 that imposes an additional 12 cent tax on tobacco products in California. I know exactly how they're going to do it--valid initiative. I know

by when--November 2008. I know what they're doing. They're going to pass a 12 cent tobacco tax. So that's really specific.

But we start to get really generic sometimes. A bad goal to me would be get legal counsel for more people who can't afford it when accused of a crime. I'm sure that we would all agree that indigent folks should get the kind of legal counsel that they need. But when we say that, "Get legal counsel for more people, " we could start anywhere.

In getting legal counsel, does that mean we're going to get pro bono lawyers to say that they'll donate time? Do we want to get the state legislature to say something? Do we want more indigent people to actually request counsel? There's all sorts of ways that we can meet that campaign goal. And because there's so many ways, it would be really hard for us to focus in and decide what's most strategic.

Sometimes I just call it the ugly. That's things like stop genocide. There are so many things that have to happen in order to do that, and while an absolutely worthy goal, we need to know specifically what exactly are we trying to do to stop genocide and make sure that it's measureable and doable.

I know sometimes you want to run those big public education campaigns. There's been a big drunk driving one that's been run for the last couple of years. Many of you have probably seen it. It says, "Over the limit; under arrest." They've actually had a fairly significant drop in drunk arrests. What's important to note about it is what they're measuring.

When you say we're going to reduce the number of drunk driving, you have to be measuring different things. They're measuring the actual arrests rates. They also had to go in and make sure that cops were actually enforcing that. That when they pulled somebody over, that there were actual teeth to this claim--over the limit; under arrest.

And the other thing is they tend to run these ads during high-drinking weekends, as a real reason to tell people that basically if you get pulled over, you're going in. There's going to be no questions, no ifs ands or buts; you're going in. It has actually produced an outcome of several percentage points, which is very impressive nationwide.

So you can still have some of these bigger campaigns that you can run, but you do need to know what are the metrics you're going to measure in there, because if you don't have those, you won't really be able to tell if you're being successful or not.

That takes you to stage two and a decision. This sounds really easy to do, but generally, it will take a whole meeting, if not more, to get your group or your coalition around it and actually set your measureable goal and say this is what we're going to try and do. Once you have that, you need to move on to stage three.

Stage three is really where you're going to chart your course. To me, the course is basically the highpoints of your campaign. It announces steps that you are going to take along the way to show you're making progress on your journey.

To me, it's very much like a road trip. If I'm going to drive from Washington to San Francisco, I want to know exactly how I think I'm going to do that. I really just need to mention the big stops along the way. I'm going to drive from Washington, and then I'm going to stop in Pennsylvania. I'm going to go from Pennsylvania, and then I'm going to stop here, next. Then I'm going to go here and here.

The point is I'm not giving so much detail. I'm not telling you I'm going to get in my car and open up my garage and pop a Coke. Start driving down the street and wave to my neighbor. That's way too much detail. But I do want to know what those highpoints are along the way.

Some of the things are things you probably don't control, but have a lot to do with what you have to do. If you're trying to run a legislative campaign, you're saying, "Well, the bill will be introduced here, because that's when bills get introduced." Or, "It will be in the budget here, because that's when the budget gets introduced." Some of the things you just completely get to plan.

What important about the course is that you're not saying things you're going to do. You're saying things that, in conclusion, will allow you to move to the next step. In other words, if I say, "I'm going to go from here to Chicago, " and I never make it to Chicago, I probably am not ever going to make it to San Francisco, because if I can't make it to Chicago, I can't make it to San Francisco.

That's what you're looking for, too on your course, is to say, "Along the way, these are some of the things that we need to do." So as an example, for stopping smoking in public places--which they did in Philadelphia--they had a couple of key things on their course.

The first was they wanted to release a report about the dangers of secondhand smoke to workers. They've decided they're really going to talk about this from the worker's perspective. They have to be there. They're the ones that are getting sick. They want to, first of all, issue a report to let people know in Philadelphia how many workers are affected by this.

A second goal is they're going to get customers to say that they will go to restaurants who have a smoke free facility. That's really important because you're anticipating that the restaurants are going to be concerned that they're going to lose customers. So by asking customers to leave a card on the table from a month before you launch the campaign to say, "Hey, if you go smoke free we're going to come here even more than we do now, " that's an important step.

Then if you're going to recruit some restaurants to be on the upward side, that's going to be critical. What you want on the course is to be able to say, "How many? How many restaurants are you going to get?" Again, it's not your course saying, "We're going to get some restaurants." It's, "We'll get 10 restaurants."

We feel like when we get 10 restaurants, that's a checkpoint for us along our way. That is a point at which we can say, "OK, now we can move forward and go to the city council and ask them to introduce this, because we have got customer support. We've got a real

problem. We've got some restaurant support. We have enough to go there." You don't want to go before you have that.

Those are the key things along the course. The things that you really think with your theory of change absolutely have to happen in what order. This is scary. People do not like to write this down. They don't like to write it down in ink. They don't like to write it down in pencil. But the truth is you do have to see how you can win. You need to know that these are the steps along the way. That you think if you hit them, they'll go.

The most important thing to note about this is the steps are conclusions. Again, it's not I'm working towards this. I'm generating business support for... I'm actually saying how much business support I think I need to keep going on my journey. I hope that's pretty cleared up, folks. Again, we can answer some questions at the end.

Keep in mind, too that a lot of times as I'm talking about this course in stage three, a lot of these are public examples. As many of you know, a lot of times their campaigns are quite private. They might be private, behind the scenes meetings. Those still require planning. Just keep that in mind.

As you think about your course, everything may not be a big public thing. It may, in fact, be some quite meetings to get done what you want to get done.

In stage three, you just want to write down those major steps. You can see it in the guide that it's asking you to think about some of those steps. And think about what some of the benchmarks are that you could really measure along the way to know that you're making real progress on your journey.

That takes us to stage four, which is a very, very, very important stage. That is to anticipate conditions. Now that we know where we're going. We should be able to see what's going to happen to us. What are some of the good things? These people are going to be really for us. They're going to love us. If we go into this town, American Cancer is going to just absolutely adore us. Moms are going to love us.

Also try and figure out who's not going to love you so much. Who's going to be a problem? Where are those things going to come from? Also, a lot of us realize we have competition.

Certainly when we're out there fundraising, we're not the only ones fundraising. What's your competition in this space? There's a lot of really worthy social issues. What's going on? How are you really going to differentiate yourself?

The big thing to really ask yourself in stage four, to account for, in your course that we just went over in stage three, is what is truly standing in your way to win? I'm going to talk about this from two different perspectives.

The first is what is truly standing in your way? For some of you, that will be active opposition. There's actually opposition that is going to find ways to try and derail what you're trying to do. What you're trying to figure out is to list the opposition, what they're

likely to do, and be able to strategically say, as part of anticipating conditions, how you're going to build into your strategy to overcome this.

A great example of opposition is pro-gun groups. There are pro-gun groups who really think that we should be able to protect our right to bear arms. When there was a big shooting in Virginia Tech, it started by having a conversation about access--who should and should not have access to guns. This really isn't that helpful if you're a gun group who's trying to keep guns legal and keep them out there.

Instead of having that conversation about who should and shouldn't have guns, they actually said, "You know what we're going to do? That doesn't necessarily get us where we want to go. We're going to come over here and make the conversation about campus safety. We're going to say what actually will make this campus more safe. In fact, perhaps more teachers should have guns. If teachers had guns then maybe so many kids wouldn't have gotten killed." And this is a completely different strategy.

In order to do that, first of all you're saying, "When the opposition comes on me with this access saying, I'm going to ignore it. I'm going to launch a pro-active strategy over here to spark a new conversation."

Now, brilliant strategy and you absolutely have to have a conversation that is enough of a starter that you can move over there. But that's a really good example of a group's really thinking about where their opposition--in this case, inside gun groups--is going to come and what they need to do.

Another thing to consider that we usually do is when we're considering opposition we think oh, these people are going to be against us. We're going to go head-to-head. They're going to say it's a tax. We're going to say it's not a tax. We're just going to go head-to-head.

The problem with that is in order to go head-to-head and really win among the public opinion of the people you are trying to sway you must have what I call a super majority immunity. We see this in social security.

Basically, anytime people come in and try and privatize social security, you suddenly realize that you have a super majority that actually prefers that to be a government program--that they really like it. When you try and change it, people don't like it.

So really important to think about don't do head-to-head strategy if in fact, when public opinion's pushed to it, it's like 51 to 49. That's not a time to do a head-to-head strategy.

Another is to be able to look at where your opposition might come at you, and be able to think about inoculating them. For groups that have worked really hard to expand the Family Medical Leave Act, you sometimes end up with opposition always saying it's bad for small business. You know that's coming.

Instead of doing that, why do you, instead, try an inoculate it and close off a weak spot? Make sure that you've got some small businesses signed on for you before you go public with your campaign.

So really trying to think about how you can inoculate yourself. And that's when what you want to say is, "I've got opposition, and what I'm going to do is I'm going to inoculate. And here's how I'm going to inoculate."

And you actually want to go back and put that into your course, that you actually need to recruit and put down how many small businesses you think you need to recruit in order to successfully inoculate that as part of your core strategy.

Now as often as we opposition we have what I call "inertia, apathy, and other obstacles." So for a lot of our issues it's not that there's any active opposition. People know that they're supposed to exercise five times a week, 30 minutes a day. They know that. They know they're supposed to eat their vegetables. They know they're not supposed to smoke.

So the question is, what's really standing in the way, and acknowledging that and coming up with a strategy to overcome it. Not just, "Oh, maybe if I tell them more." No, no, you're REALLY supposed to exercise 20 minutes a day. That's probably not a great strategy if they're not already doing it.

So some things that you want to consider, one is to try and figure out can you programmatically, on your course, switch inertia so it's in your favor. Inertia is a really important thing to consider.

Let me give you an example. If, as an employer, you offer people when they get employed that they can sign up for your 401K program. In general what you find is a very, very, very low participation rate. But if you switch that inertia and instead employers automatically sign up all new employees for 401K and you have to opt out of it, you have much higher rates.

So when you look at that as "I want to increase the savings rate in United States, " that might be something that you look at as to programmatically actually make part of your course, getting businesses to agree to an opt-out approach to savings rather than and opt-in. So that's really understanding where inertia can be switched, potentially to help you.

Another thing to think about is if something is a really low priority. And trying to think about, well, what can you do if something is a really low priority. And we saw this with childhood obesity. It's not like there are a bunch of people out there thinking that it was OK for children to be obese, there just wasn't real urgency behind it.

But it's when a governor gets really behind it and it happens to be the head of the National Governors Association that you really suddenly start seeing a lot more stuff happening. Because you have basically the strategy to have leadership. Leadership calling on people to do a lot of certain things.

And you had a lot of leaders. You had the mayor of San Antonio getting really involved to make sure his city slimmed down. So you started seeing a lot of things because of leadership that was out there. That was an important strategy.

And last, sometimes you want to think about things that are really difficult, and one of them is called "cognitive dissonance." And I don't know how many people have studied that at all, maybe classes back in college. But cognitive dissonance is basically when you're dealing with a situation where people actually do know something is quite bad for them but they rationalize it away, because to actually give it up creates actual pain for them.

We know this from smoking, right? If people want to smoke and they know it's bad for them, eventually they have to say things to themselves to discount and create distance between facts and their behavior. So they start to say, "Oh, my Uncle Randy, he smoked until the day he died, and he was 96 years old."

And this is where they start to rationalize this, and this is called "cognitive dissonance." This is a specific, really hard thing to have to overcome. And there were some experiments that give us ideas for strategies in dealing with this out in California. A professor was trying to get college kids to wear condoms, and found that they just wouldn't wear them.

He started first by scaring them to death. So 16% said they were wearing condoms, and they scared them to death and gave them all these messages about AIDS and what happens and how horrible it is. And it went up to about 18% who were wearing condoms. So the scare factor was not really working, because again that cognitive dissonance was just so strong that they just really didn't want to wear them and they were finding ways to excuse themselves and excuse their irresponsible behavior.

So then actually he decided that he would get a couple of the stars from the local play on the college campus and actually film a very sexy commercial. And apparently the girl is like tearing the condom open and they're making it seem like it's a ton of fun to wear condoms.

And in fact, after these commercial ran on the college campus, it went up to almost 60%, or over 60% of kids actually reporting they were wearing condoms. But only for two months. Because the truth was that behavior change was a lot harder, and it wasn't probably as fun as the stars made it seem. And it probably wasn't as sexy. So really, their experience didn't play out for very long.

Well, then he asked a group to come in and film a video that they were going to distribute to the local high school about why you should wear condoms. And they, on the videos, were lecturing the high school students about the dangers of not wearing condoms.

And what happened was as they did that and as they became public advocates themselves for the right behavior, that when they left that room they were paid \$5, and on the way out many of them spent their \$5 on condoms that happened to be for sale right there.

And the reason was that they were faced themselves with their own hypocrisy of what they were doing, and that their behavior in fact was now out of whack with their public persona because they had filmed something that was going to go to these high school students.

I tell you that story, not that all of you are necessarily going to be able to use hypocrisy to solve your problems, but to say when you have things and you know what you're up against.... You say, "You know what I'm up against? I'm up against that cognitive dissonance thing." Or "I'm up against that inertia thing."

You actually have to have a strategy for overcoming it. You can't just pretend that doesn't exist and run your campaign as if you don't have to take that into account.

So those are some things to think about. And then you'll see on stage four that it's then asking you, of all the things that you'll probably think about, the good and the bad, what do you really want to keep in mind and plan for. And at that point, you both want to look back. You want to look at stage three and think about what your course might be like, and if you want to make any adjustments to your overarching course.

And then moving into stage five. Stage five is really about putting some meat between the bones. And it basically says, OK, if I want to get from Washington to Chicago and Chicago to here and here to San Francisco, it's telling me what are the things I think I have to do along the way in order to get there.

And this is where you're starting to put up your major activities that you might do. So again, going back to that smoke-free situation in Philadelphia. When they said that when they thought they were going to get restaurants involved, they probably really had to think about, well, how am I going to get from restaurants involved to an introduction at this city council?

What were the major things that they had to do? Well, they probably had to secure, say, 10 restaurants. Then they probably had to get the restaurants to go meet with the city council. They might have needed to get a petition going. They again might have needed customers to fill out those cards that said they would still keep going.

And those start to give you your major activities, what kinds of activities are you going to have to operationalize. Do you have a field campaign? Are you dealing with the grass roots? Are you dealing with communication? Are you going to have intellectual knowledge? Do you need to release a report or a poll? What are your major categories that you're starting to see in stage five that say, "These are the kinds of things I have to get going in order to go from step to step to step successfully."

So it should give you a good sense of how to make headway. By the end of stage five then, you've really got a roadmap with some detail in it that's telling you exactly what's going to make up your campaign. I'll talk about how to operationalize that in a minute.

But first you sort of take a break, because now you sort of know what you're trying to get done. You've got some measurable things in there, like how many restaurants you have to recruit. And now you can prioritize your audience targets.

So in stage six, we're really looking to say, OK, based on what you want to get done, who truly are your important audience targets. And this is where absolutely - and for those of you who are fans of the "smart charts" you'll know you many not say the general public. You absolutely cannot do that.

You really have to understand the segments. And what I would say is the trick here is to actually, for each segment, put as many adjectives down as possible, so it's not just, "I'm going after moms." What kind of moms? Are they single moms, are they urban moms, are they college-educated moms, are they not college-educated moms? Do they work, do they not work?

All of these things will really help guide you in how you're going to approach them in your communications with them. So you really need to know a lot about them. And you kind of need to know where you're win is.

And for some of these, like on Proposition 8, which ran in California around the issue of marriage among gay partners, at the end of the day that campaign did not win what they wanted to, and it was because they underestimated where, basically, the African-American faithful were going to vote.

What happened was they needed 51 to defeat Proposition 8. What happened was they never really added up their segments effectively to say this is how we're going to get to 51. That's really critical, is to absolutely know how you're going to get to 51.

Now for others of you, if you're trying to do a race for a cure or you're trying to get more people to wear seatbelts, you really need to understand how many people moves the needle and where do you think that's going to come from. A lot of times you're going to have choices. You're going to have choices about where you can start to get movement.

We think about drunk driving, and you can sort of tell who those ads are for. They tend to be for people who are going out in the evenings. They're at bars. They're driving home. It's a lot of men. They've really got a good sense of who the target is, where they think they're going to get those decreases in drunk driving.

That what you want to do, too in stage six, is to prioritize your target audiences and make sure, if you're in a political battle, you've really planned to win. And if you're in a behavior change battle, that you really understand what's going to move the needle enough to be impressive for your campaign.

Move on to stage seven. We just put a public face on your campaign. It sounds sort of funny, but sometimes we don't think about our name that much. The name actually is something that tends to become very public. People get to know you by it. In fact, we do see a lot of the political stuff move with no I'm Prop eight or yes, I'm 187. This is totally devoid of any value.

You really want to think about, with your public stand, what value do you want to convey? Really think about, do you want to be for something or against something? There's different reasons to talk about different things. Being for something or against something actually gets your audience target to feel different emotions. You want to think a lot about that.

You also want to see if your public face can actually blunt some of the criticism that might come your way. Also, in putting a public face on your campaign stage, you absolutely need to figure out what your main points are, four main points.

A great example for this is Catalog Choice. If they're a group that really wanted to make sure that catalogs were not clogging up people's mailboxes, unwanted catalogs. They're really an environmental group, but they went with Catalog Choice, you decide what gets inside.

They really wanted people feel like they were in control of their life. That's what their audience really cared about and it helped them with the company they're trying to work with like the Pottery Barn, which is about choice, catalog choice. They weren't anti-catalog. So, really important to consider your public face.

Wrapping around to the end, there, once you figure all that out, that's basically your strategy. Then in stage eight, that's where you really need to operationalize. We've got a lot of guidance in the book. I'm not going to go into a lot. This is really where your tactical is come.

So as I said before, once you've gone through stage three and stage five and you have that roadmap that I talked about, you now know if you need a field plan or a communication plan filled with tactics and deadlines. This is where that happens, that you would literally assign out to different staff, to take it out and get all the details down that you need and operationalize it.

That leads to the last stage, which is to really stay on track. You want to make sure that you're asking the right questions. We all know that the campaigns are going to change. They're going to succeed in some places and fail in others.

What you really want to keep in mind here are two key things. One is to figure out what key questions you want to ask at status meetings and how often you want to have them.

The questions should really focus on basically what's changed since the last time and is it favorable or unfavorable? Does it basically require you to make any kind of mid-course corrections? So really think about what those key questions are so that you can measure where you're going.

Last, it's a great opportunity to gauge how you're going to think through opportunities. We have all had those bosses who come running in our office. You've done all this campaign planning and they're like, "I have a brilliant idea." You think no, no, no because we've just done all this planning.

The question is rather than telling people "no" all the time, the question is how can you really look at opportunities objectively so they don't suddenly pull you off course if they're not, in fact, strategic. But that you can consider them and to coming up with questions that remind you about key strategic decisions you've made. See if that opportunity is worth pursuing, even though you didn't plan for it.

So it's a great thing to do. It's particularly important with coalitions, where you can end up feeling like you're constantly revisiting decisions is to have that opportunity gauged and put that as part of your status meeting.

I'm going to end there, because I've taken you through the nine stages, and allow folks to ask questions, clarifying questions, or even share their own experiences from the field.

And just say, in closing, that this is all online, Just Enough Planning. Everything I've basically said is in the guide. There's an interactive tool there, too. It's free. You can use it and we encourage people to.

It takes you through a lot of other questions to consider and just gives you a real process to follow to have what I think is so important, which is a written campaign plan at the end of the day that you can really follow and win with. So I will turn it over for any questions.

**Rebecca:** Wonderful. Thank you so much Kristen. I know that I learned a lot and I even read the guide before, so I appreciated you taking us through all the steps. We do have a handful of questions.

All right, let's get started. We have a question from Andrea, who says, "How can one have a successful campaign without any existing funds?" I'm assuming that her organization is fairly new and is unsure how to start.

**Kristen:** Sure. First of all, I always tell people the fewer funds you have, the more you do need to plan. What you're planning for then as a resource is probably staff and volunteers and time. Then just to make sure that when you are doing stage four, which anticipates conditions, is that you really let yourself know what assets you have to work with. Between possibly your board of directors, volunteers and staff, what exactly can you take on?

A lot of the most successful campaigns actually happen very person-to-person in important meetings and getting people to do stuff, or even in your own communities, doing some fairly low-cost activities that can get you really far.

I think you have to think about what you're trying to get done and then how you can do it where you're able to use the assets you have, such as staff time or volunteer time or board of directors time, as opposed to thinking about things that cost a lot of money, like Web sites and media and that sort of thing.

I would just get you started by saying go through this, keeping in mind that that's what you have to work with. Limit yourself in that way. Say all we have are the ability to go

meet with people, talk with people on the street. Hand some things out. Truly what you have to work with. And build your campaign that way.

**Rebecca:** Great. We've gotten a couple of questions of folks wondering where they can download the guide. I just want to point everybody to The Learning Center. If you go to [www.nonprofit911.org](http://www.nonprofit911.org) and then you click on today's training, there's a link to either go directly to those Spitfire Strategies where you can download the guide. Or, we've uploaded it, as well and you can download it directly from there. Again, that's [www.nonprofit911.org](http://www.nonprofit911.org). Great, onto our next question... Kathy writes in and says, "Can you address some examples of stage three, Charting Your Course, for a capital building campaign?"

**Rebecca:** Sure. So for a capital building campaign, you would want to know that you've, as a conclusion, come up with a value proposition. That you know exactly what you're going to be building capital for, and that you've assessed what exactly would be valuable to the kinds of people that you have. Then you would want to know that you have a prospect list, and that your prospect list has the financial capacity to give the kind of money that you're looking to give in a capital campaign.

Then, from there, I would generally want to set earmarks based on monies raised. Instead of being very focused on events like we're going to launch here, or do 10 house parties, or do a huge gala, or whatever might be anchoring your capital campaign, I'd rather see how you're think the money's going to come in.

A lot of times people will choose not to launch publicly until they have, for example, \$500,000 committed from their board of directors or other entities. They're basically announcing coming out of the gates because it attracts money. You'd want to, say, have secured \$500,000 prior to public launch. Then talk about the time periods that you think it's going to take to weigh in.

One way to think about it, too with capital campaigns is to try and separate out your donors. As we all know, donors come in a lot of different sizes. Thinking about people that are those early adopters and what messages tend to work for them and then those people who are more in the middle, they tend to give because other people gave, versus those very last few who might more because they are getting over the finished line or they are really about hitting the final mark and feeling like they are the ones that really made it happen.

So you are probably going to be evolving your messaging to be appealing to different kinds of people, so those are some ways to think about a course, looking at it from a capital campaign or a fund raising perspective.

**Rebecca:** Great. All right, let's move on to Dora. Dora wrote in and said, "We are a new not for profit. We provide educational preschool classes to three to five year olds at daycares in underprivileged areas. Our goal is to increase school readiness. By doing so, we hope to raise school SOL scores and increase elementary school success in these areas. On the point of measurable goals, should we measure the preschoolers knowledge to our class subjects prior to going into daycare and then after to say we increased their

knowledge in these areas or should those measures be based on the opinion of their preschool teacher at the daycare obtained by a questionnaire and answer form to get their feelings about the classes, and then the same after our classes and compare the results. What would be your suggestion on a measurable goal and what is your suggestion on how to actually measure that goal?"

**Kristen:** So, just so I understand that the actual goal, they want to measure the readiness of the kids who are participating in their program actually get higher readiness scores when they go into kindergarten, is that right?

**Rebecca:** Yes, that's how I read it I do believe.

**Kristen:** Yeah. I think there is a lot of different ways to measure that campaign. I definitely think if you can just straight out measure the kids knowledge to be able to say that they came in here and this is where they went out, absolutely that is great evidence to be able to provide that your program specifically works. I think you can also anecdotally ask the teachers in the kindergartens who are intake for these kids, to see if they happen to notice that the kids coming out of this program seem more prepared, so while that is more anecdotal and not the same evidence basis, asking for the kids knowledge. I think it says a lot, because those are the experts and those are the frontline people who are saying whether or not they feel like these kids are ready to learn or not.

So I think that that is important. I think you can also measure sometimes, because sometimes those outcome measurements do take a long time either measuring the kids' knowledge year to year or asking those teachers for that anecdotal evidence, but the other things are, you can also measure best practices that you have in your program that you know through the childhood evidence that these things work. And because they are in your program and kids are getting them earlier, that experts say that they lead to better outcomes later.

And I think when you can say in our programs unlike other programs they are getting these things. That's another way to talk about the effectiveness of your programs to increase people's feelings that you are doing a lot of different things to increase readiness. So I think there is a couple of different measurements that I would put in place if you can.

**Rebecca:** All right, let's see, we have a question that came from Martha and not to put you on the spot, but Martha wrote in and requested, "Can we get an example of this tool being used for a fundraising campaign in addition to just a traditional advocacy campaign, which you have outlined a few times?"

**Kristen:** Yeah, I mean we literally just produced this thing, so I don't have one that is specific to this. We talk to a lot of different folks who use campaign models and we included fundraisers in here. And I think what they really felt like was it helped a lot for them to think about, how to have the course and make sure that we understood how we are going to get to a place where we could raise funds, that allowed for a lot of segmentations of different kinds of funders. And I think they also were pretty big on the stage for anticipated conditions and really thinking about what was going on out there in the climate and really helping a group to understand where their uniqueness was, where

their value was, were their funds going up, were their funds going down, certainly right now thinking a lot about the economy and how to approach people and when to approach people.

So I think that overall they felt very much like this could follow a model to consider for planning for fundraising. You may find that you want to tweak it. Again we tried to put up nine steps that seemed to work for a lot of different kinds of campaigns to give everybody kind of a one-size-fits-all process. So I think you might find within fundraising that you want to tweak some of these steps appropriately.

**Rebecca:** Great. All right, let's see. We have a question from John and John Eisenen [sp] says, "Hi Christine, great thoughts, thank you. Do you have any general advice for maintaining the right balance between strategic and tactical portions when planning my online fundraising campaigns?"

**Kristen:** I am sorry, can you repeat that last part?

**Rebecca:** Sure. Do you have any advice for maintaining the right balance between strategic and tactical when planning my online fundraising campaign?

**Kristen:** Well, I think to me it is a big thing, especially with something as huge as online. I think we have so many tactical options right now online. I really want to make sure that you have a well thought out strategy, that very much is focused on your goals and your audiences, who exactly you are trying to reach. I find that when we start tactically, we do a lot of things to make those tactics really succeed, which is really quite different than the money. So just a great example is, I sort of feel like people could be building really robust Facebook pages, they could be doing a lot of Twitter. You could actually have an incredible online interactive social networking program that's actually not raising money.

And I really think that that's because it is not so much a balance, it is one comes before the other. Your strategy absolutely, you have to make really tough strategic choices about what you are doing and most importantly what you are not doing, who you are not reaching. These are the kinds of things because then you can really focus your time and attention on effectively reaching the people that you want, in this instance to raise money online.

And I just think especially with so many options right now available interactively, you really have to have such a clear sense of who you are trying to reach and what their giving habits are online and what's going to appeal to them. And that's a lot about just understanding your audience a whole lot more before you ever utter the word "Twitter."

So that would be my big thing is less of a balance and more of absolutely your strategy has to be crystal clear, because then your tactical decision should actually be quite fewer based on exactly who you are trying to raise money from.

**Rebecca:** Great, makes a lot of sense. All right, let's see, we have a question from Christina. Christina is from a nonprofit focused on fighting poverty and hunger. She asks,

"We have an amazingly broad coalition that has come together around the food crisis. This call is making me realize that we need to narrow down our focus areas if we are to have a successful campaign, but how do we narrow down without losing partners, any suggestions or processes?"

**Kristen:** I mean I think start with what are we for and what are we against as a great group exercise and try and find where that commonality is and hopefully you can narrow very naturally about what you can agree to. But I would also say don't ever be afraid to lose coalition members in order to achieve more. I think we have all been part of the huge coalitions that just didn't get work done because we were constantly trying to make decisions, we are constantly making things more generic, so more people could sign on to it. And we all know that in fact a lot of these efforts have to be highly targeted and highly tailored in order to succeed and what is an incredibly competitive marketplace of ideas.

So I would just encourage you to start first very hopeful that the group can come together and agree that in order to succeed we need to set some very specific measurable objectives or goals, whichever language you prefer. And start with what are we for and what are we against and just see if you can find enough common ground there to hold their weight together.

But if you find that actually you kind of can't put something down that is measurable that you are all for, then your coalition is probably too big and you need to focus it.

**Rebecca:** Great, let's see...

**Kristen:** And just - I am sorry - I just want to add one thing, I think it is really important. I was with a group recently. And there is reasons to run social marketing campaigns, which are different than these kinds of campaigns. They are based on the four P's and not to get into too much or even that some of you have to run education campaigns, particularly as I said, for those of you that are still really working on problems. For some of you, you are really running education campaigns and those are a little bit different too than what I would say this tool is used for. For me this tool is really used for knowing you want to raise \$1 million, pass this policy, get this behavior changed, very very specific. So there's reasons you would work in coalition and not have necessarily a really specific campaign goal.

And that's what I mean, you may even want to go through that first step of stage one to decide, is this coalition actually responsible for running a campaign that has a measurable goal. Or is this coalition actually supposed to be building an environment in which different groups could run a campaign. So I hope that makes sense, that you use different kinds of strategic planning tools for different kinds of efforts.

**Rebecca:** Great. Let's see, we have a question from Ann, who wrote in about her campaign that she was considering. And she says, "The Deltana Fair Association is 501C3 organization. We are in need of help with pathways through the fairgrounds, fencing the perimeter, new buildings, et cetera. Any suggestions for what we can do would be appreciated."

**Kristen:** So it's a 501C3 that's trying to get paths built through a fairground?

**Rebecca:** I guess just pathways, for better access throughout the fairgrounds and actually fencing. Increasing new buildings and new infrastructure. So they have a lot on their plate and they're just getting started.

**Kristen:** A lot on their plate. I think one of the great myths of thinking about making change is that you only get one bite at the apple. So I think groups really need to be thinking about how they can be working with municipalities, counties, and others as they're doing planning for these sorts of things, and giving them suggestions. But at the same time, not overwhelming them. So you might try to decide stage the different projects because they make sense, for whatever reason. So first being able to kind of give them things that they can start to do and adopt and get positive feedback from the community.

I'm wondering if you're asking about 501C3 because you have to know whether or not if you're working within regulation and trying to propose changes which would be largely fine to do as a 501C3, versus actually lobbying for something and having to take your lobbying allowance.

I think there's a lot of policy maker education that you can do to make sure that they understand the needs of the community and align them with what they're plans are for areas like the fairgrounds.

So really starting there by trying to showcase them what the needs are of the community. And that may be a really great first step. Because when you can start to say that an area that's getting planned or is continuously planned is actually out of alignment with the community needs, then the process will actually get born that might be a process between your organization and the locality, to try and figure out how to get the alignment back. So it might be a really great place to start, is to be able to point out where this misalignment is.

**Rebecca:** Great. We have a couple more questions. This one says, "Hi, Kristen, I really appreciated your thoughts a few minutes ago about strategic versus tactical. Great advice. I feel like once a week someone pulls a fire alarm about how we aren't active enough on the social network du jour. All right, on to my question. We're a small nonprofit with an all-volunteer staff. I've been asked to create our fundraising and marketing plan and launch our very first online fundraising campaign. I'm new to this world, and to be honest I'm not sure I understand the difference, especially since the goal of all our marketing efforts is increased fundraising. Can you shed some light on this?"

**Kristen:** [laughs] Well, it does sound like you're using them pretty synonymously. I will say that sometimes we do market things other than fundraising. But if you're saying that all your marketing should be tied to fundraising, I think it's actually easy to tackle your first issue that you brought up on the question, which is, why people are going to ask why you're not doing the latest social networking du jour. And that is that in your assessment of how you think about how to use different marketing tools that are available to you, you're making sure that they're the ones that actually are proven to raise funds. And

I'm sure a lot of people - it sounds like - that are on the phone are themselves great fundraisers.

The truth of the matter is that different things help get different things. And while I did read yesterday that there was an amazing fundraiser online all over the world that raised enormous amounts of money on Twitter, you're not necessarily hearing a ton about that.

So I think for you, really trying to understand, starting with your goal, where you're going to raise this money. And then how do those people give. And I just think you always want to keep going back to really trying to understand your audience and your audience behaviors and your audience lifestyle. Because that's really going to guide you to the right marketing tools.

And I think any time you can put out those right strategic questions, it just really helps people to understand that you are trying to answer them in a really strategic way, that you're very focused on that if we did this it would take this effort and I could anticipate back X dollars.

And then if you can't anticipate back that it would definitely bring back X dollars, that that's the reason you're not recommending. It's not that you don't know about, it's not that you're not comfortable with it, it's actually that you don't see that it is going to produce the result that you want from that marketing mechanism, which in this case is money.

So I think that's really important, to build your marketing plan around, for each of them, to actually feel like you're going to put a line in the sand and say, "I think this thing is going to produce X dollars and this thing is going to produce X dollars," and go back and look at it. And when it doesn't, be able to say, "We tried this and it didn't work. And we tried this over here and it worked really well and I think we should spend more time over here."

I will say for all of you, through this strategic planning that your doing for any of your campaigns, fundraising or otherwise, do cultivate an atmosphere of risk. For many of us, I think we're so nervous about doing stuff in the marketing realm that sometimes we don't do some trial balloons.

Trial balloons are really important, because you're going to see where some opportunities exist and you're not going to become a one trick pony. But I will say that I think it takes some effort to work with your senior leadership and your board, or whoever you're responding in to, to also make sure that they understand that there's risk involved, and it's good for you to be innovative and it's good for you to be taking risks.

And they should be well thought out. Again, you should be asking the right strategic questions, you should be looking at trend reports to see what's most promising, and talk about why you think it's going to apply in your field to your work. But do cultivate that feeling of risk. It's one of the most important things.

You want to be held accountable, you want to put metrics down, but some of your accountability is figuring out what doesn't work and that's really important too, to figure

out what doesn't work. It's important to stop doing it fairly quickly. [laughs] But it's a good thing to try and figure that out.

**Rebecca:** Let's see, Robin has a question. "We are a statewide network of local county-based agencies trying to coordinate a common campaign trying to raise awareness about child care resource and referrals sources. Any suggestions for setting one state-wide goal and at the same time have locally particular goals?"

**Kristen:** Sure. I think it's good to say what a macro-metric should be. You want to do referrals and calls, you may want to say that overall in the state we want to have referrals up by X. And then be able to assign out by county and tailor and allow them to say how they're going to meet that number. So let's say they were going to increase referrals statewide by 20%. And you can even overlay that if you want, based on demographics. If there's certain kinds of demographic folks you think should be calling in more or making more referrals, you could put that in too.

And then actually ask the counties as they're going to go and do their stuff, to ask them how they're measuring it and what they're measuring. Because they might be able to tell you specifically, like, "We're going to get this number from this specific population." Or, "We're going to get this number through these specific types of events."

And then you're able to see basically, while you wouldn't necessarily know exactly how it's going to come down statewide, you can start to add your numbers county by county. And making sure that people are hitting them, so you're hitting your overall macro-metric that you're trying to do. I hope that's helpful.

**Rebecca:** For our final question, it says, "We have an old-fashioned problem. We have a boring mission statement and I've had a hard time translating it into compelling messaging. Is it as simple as hiring a good copywriter? Or am I missing something?"

**Kristen:** You could certainly do a good copywriter. Sometimes the buy-in won't be so great for that. People get really funny about changing mission statements. There was actually a really great article - I'm going to give you a blog in a second - called "Mission and Mantras." The idea is that sometimes in addition to having a mission it's good to have a mantra. And it's kind of, they talk about Wendy's would be, "Good Food Fast." So it's really understanding the unique value proposition of your organization. And it allows you to be kind of mantra or elevator-speak language, as opposed to mission language, which just on the face of it and how it tends to get approved can be quite deadly.

So I would highly recommend this mantra. If you go to the blog or [guykawasaki.com](http://guykawasaki.com) and look up "mantras" you will find "Mantras Versus Missions." And it might be a good way to think about it. But it's good to engage in an organization-wide conversation about such things, because a lot of times when you go and get it beautifully done by a copywriter and it comes back in, the buy-in is not there. And what tends to happen is people start to wordsmith it and pretty soon it looks like exactly like your mission statement.

**Rebecca:** Pretty much what you were trying to avoid.

**Kristen:** Exactly. [laughter]

**Rebecca:** Wonderful. Thank you so much, Kristen. This has been really wonderful.

**Kristen:** Great. Thank you.

**Rebecca:** We appreciate your time on. So thank you again, Kristen, and thank everyone for taking part in today's call. Hope you have a good day.

**Kristen:** Thanks. Bye-bye.

**Rebecca:** Bye.

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