



# Chapter 8

## Planning

**A Guide for Event and Organizational Planning**



# Time: Your Most Finite Resource

An organization can work to grow its activist base and its fundraising base, but the one thing no campaign can raise or grow is time. Everyone has the same amount of time, and once it's wasted, it is lost forever. The only way to use this resource to its fullest potential is to make the most of what you have. Strong planning skills allows an organization to utilize all three resources – time, people, and money – to its fullest potential.

Planning puts organizers and campaigners in control of the environment around them. The mindset changes from “*This is happening to us*” to “*We are making this happen.*” When utilized correctly, planning maximizes flexibility, accountability, and productivity.

## Four Key Principles of Effective Planning

### 1) Explicit and Written

Plans do not exist if they are not written down. No matter how much a person can keep in his or her head, a campaign or an organization has too many variables to keep track of. Writing forces the planner to think through the plan. Written and explicit plans also allow others to see the larger picture. The more people have access or input into the plan, the more invested those people will become. Others might also help identify problem areas. Plans do not exist on sticky notes, napkins, or scraps of paper. A good plan takes up a whiteboard, pages of notebook paper, and/or spreadsheets and word tables.

### 2) Set Specific, Quantifiable Goals. Establish Benchmarks.

Goals should be tangible and/or numerical. If the goal cannot be seen, touched, or counted, it is not specific enough. Set goals using real numbers. Goals based on real life rarely end in clean 5's and 0's. Avoid approximations. If approximations are necessary, make sure the numbers are attached to a meaningful end result. As you plan, break these goals down along your timeline to set benchmarks to gauge progress. To the extent possible, determine how much time each task or component will take. This will help you prioritize and revise you plans.

### 3) Create a Timeline and Work Backwards.

Consider the end product and work back from there. Often, the goal is the first aspect of plan known to the planner. In order to reach that end product, a number of things need to be in place. Working backwards means thinking about each step by asking “okay, what needs to be done before this can happen?” over and over for each step. Consider how much time each of these steps will take. After calculating how much time each step takes, you can start prioritizing what needs to be done first and what can wait.

### 4) Revise and Update

Plans maximize flexibility only if updated constantly. Things change quickly in a campaign. The plan helps the campaign navigate through these changes, but it will become meaningless if it isn't kept up to date. When a wrench is thrown into the day, step back, and adjust the plan. This gives you the most control in any situation when other controls seem to slip away. Also set benchmarks on the way to reaching a goal. If the organization is not meeting these benchmarks, the goal will not be met. Planning allows the planner to see this before it becomes a major problem and facilitates making adjustments.

# Step-by-Step Planning Process

- Step 1:** Identify the Goals, Break Into Realms.
- Step 2:** Identify the Timeline.
- Step 3:** Work Backwards, Establish Benchmarks
- Step 4:** Identify Priorities and SWOT.
- Step 5:** Revise as Needed.

## Step 1: Identify the Goals and Break Into Realms

Whether planning a major event or just a week in the life of an organization, a number of things need to be accomplished. Start by thinking about the end result of that week, that event, or that task. What does it look like when finished? Get specific. For example, if the event is a rally, ask how many people will attend and who are those people, what will people see and hear, where will people be, who will speak, will there be media, will there be other groups, and so on.

Start grouping your goals together into task groups – create general categories, or realms, for each component of the plan. You might decide to group your media goals together in one realm, your fundraising goals in another realm, and so on. Each realm is an area of responsibility and can make delegation of duties easy.

### Example: Event Plan

*DFA-AnyCity is planning a large rally at the statehouse to support health care reform. The rally will fill the statehouse steps (about 120 people), and attract major media attention. We will have speakers, and work with our coalition partners.*

<b>Rally for Health Care</b>	
<b>Realm (responsibility)</b>	<b>Goal</b>
<b>Crowd building</b> (Chris Warshaw)	120 people in attendance, half (60) will come from DFA outreach, the other half (60) from other groups. DFA will use email lists and phones to build the crowd. One-third of the crowd (40) will hold DFA or health care related signs.
<b>Media</b> (Noreen Nielsen)	Three print media hits, two radio hits, three television hits, front-page diaries on both local blogs.
<b>Speakers and Coalition Partners</b> (Tom Hughes)	One speaker from DFA-AnyCity, One speaker from a coalition partner, one medical professional. Notify neighboring DFA groups.
<b>Finance</b> (Dina Wolkoff)	Expenses, not to exceed \$120, come out of general fund.
<b>Logistics</b> (Kyle Duggan)	Venue and security, parking and transportation, sounds system, tabling and data collection.

## Step 2: Identify the Timeline.

Once goals have been figured out, identify how much time is allowed to accomplish them. If the planner is drafting a plan for a set period (i.e. weekly planning), as opposed to event planning, this is already established. The tasks need to be arranged on the timeline, so create space to write these tasks into the timeline.

There are a number of ways to write out the timeline. If the plan is done in paragraph outline, each unit of time can be its own paragraph or heading. If the timeline is written in a chart or table format, each unit of time has its own column.

**EXAMPLE:** DFA-AnyCity has determined that the best time for the event is the beginning of floor debate on the health care bill DFA-AnyCity has endorsed. That's only six days away!

Rally for Health Care							
Realm	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Goal
<b>Crowd building</b> (Chris)							- Crowd = 120 • DFA =60 • Phones, email - Signs = 40
<b>Media</b> (Noreen)							- Messaging, media advisory, media release, blog release, radio feed, pitch calls to all outlets, prep 10 media packets. - 3 print, 3 TV, 2 radio, 2 blog hits.
<b>Speakers / Coalitions</b> (Tom)							- Recruit speakers, uniform messaging, press quotes, recruit other groups.
<b>Finance</b> (Dina)							- expenses <\$120, - checks as needed.
<b>Logistics</b> (Kyle)							Venue, security, parking, transportation, sounds system, tabling and data collection.

## Step 3: Work Backwards, Establish Benchmarks

In each realm, go through each goal and figure out the series of tasks which need to be completed to reach that goal. Write each prerequisite activity along the timeline in the corresponding row (if using a chart as in the example). To work backwards, ask what needs to be done right before the final goal is achieved.

For example, to expect 60 people at an event, you must have had 120 people to commit to coming. This means you've made 120 confirmation calls. To get 120 commitments, you will need to make many more calls over a period of time (see the section 'Building Your Activist Base' for more on the law of halves, confirmation, and calling rates). Before this, you need to line up volunteers to make the calls, numbers to call, scripts to use, and phones to dial.

**EXAMPLE:** Work out the Crowd Building realm

Realm	Thurs	Friday	Saturday	Sunday	Monday	Tuesday	Goal
<b>Crowd building</b> (Chris)	- Draft, edit email - send to list.	- 4 phones - 4 scripts - 4 vols @ 3 days	- Confirm 4 vols. - 4 vols @ 3 hrs = 360 calls goal = 40 yeses	- Confirm 4 vols. - 4 vols @ 3 hrs = 360 calls goal = 40 yeses	- Confirm 4 vols. - 4 vols @ 3 hrs = 360 calls goal = 40 yeses - Reminder email	- 120 confirm calls - 60 show	- Crowd= 120 • DFA =60 • Phones, email

#### Step 4: Identify Priorities and Determine 'SWOT'.

One of the most important aspects of planning is prioritizing. Everyone has experienced the kind of day or week when everything seems to demand your attention all at once. Because time is limited and work is not, planners must determine what tasks get attention when they are both competing for the same time. It is important to build this explicitly into the plan.

After planning out each realm, add an additional row titled, "priorities." This row will settle resource disputes before they arise. If the campaign is thrown off-course for the day and little gets done, then the plan dictates what does get done, and what is left for another day.

A person should expect to spend most of the day on the plan's top priorities for that day. Priorities typically are those items which have hard deadlines or function as prerequisites for other important items in the plan.

Not every item can be a priority. A good rule of thumb is to decide on three specific priorities for each basic unit of time (i.e. three priorities per column).

#### *Think about it...*

Ultimately, prioritizing is a lesson in humility. It is an admission that the planner will not be able to devote enough time to do everything on his/her plate. Prioritizing helps the planner decide where to spend time when the planner finds his/her time limited.

Determining priorities ahead of time is as much a decision to leave items unfinished as to decide

Realm	Thurs	Friday	Saturday	Sunday	Monday	Tuesday	Goal
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Priorities	1) Secure venue 2) Find speaker 3) Message development	1) volunteer recruitment 2) News Advisory, pitch 3) Sound system	1) Crowd building 2) draft, edit news release, radio feeds 3)	1) finalize media outreach prep 2) crowd building 3)	1) 2 <sup>nd</sup> Pitch to the media 2) Media packets 3) Crowd building	1) message control 2) crowd building 3) tableing and data collection	Overall: 1) Media hits 2) Consistent message 3) Crowd = 120

Take a look at the plan and look for **SWOT (Strengths, Weaknesses, Opportunities, and Threats)**. If one day in the plan has a light workload and another day with an unreasonable workload, this is an opportunity to spread your workload out. The plan might stretch other resources – people and money – thin at some places. Look for opportunities to combine resources. For example, if you have volunteers coming in to phone bank for you the same evening you need volunteers to paint signs you could:

- 1) Move or reschedule the lower priority task to maximize available resources
- 2) Ask the phone bankers to stay and help make signs after their shift

Look for items which require prerequisite tasks in other realms. A News Advisory might be scheduled on Thursday, but if the venue information is not scheduled until Friday, the news advisory cannot go out. Items which are prerequisites to other tasks have the most potential to set back your whole plan. In order to stay on task and meet the plans benchmarks, prioritize these items and make sure to leave enough time in the day to complete them.

#### Step 5: Revise as needed.

A plan is useless without the ability or the will to change it promptly and frequently. Revisit the plan every morning to review and make adjustments. Immediately revise the plan if or when something disrupts the plan. Involve others in these revisions to keep them interested.

Ultimately, organizations find their own planning technique. Use the basics above and develop a style that works best for you and your organization.