

HOW TO...

Develop your goals, strategy & tactics

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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. Preliminary brainstorming:
 - a. Discuss your vision and values. Understand your team's shared purpose.
 - b. Research solutions. Identify projects that are already happening.
2. Consulting your community:
 - a. Brainstorm goals based on research and 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 team's project ideas.
 - d. Collect surveys and any other feedback to help your team decide on a project goal.
3. Creating a project plan
 - a. Create a [SMART](#) goal.
 - b. Apply the Iceberg model to your goal (see section 4.5)
 - 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.
4. 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 and is most likely aspirational.

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.

2.1 Vision and anti-oppression

Your team’s vision is the ultimate vision you have for the future of the world. It is a powerful task to imagine a different world. Integrating anti-oppression, intersectionality, and anti-racism is critical to achieving inclusive, wide-scale 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. (Marginalized groups are groups of people that experience discrimination and exclusion because on power imbalances in the economy, politics and cultures of the “mainstream” society.) Movements 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 marginalized communities, research and integrate goals and dreams for the future based on what you can find out about those communities’ interests. This should be done with careful consideration. Discuss the reflection questions below with your team.

Team Reflections

- Who is included/excluded from your team's vision?
- Who benefits the most in your idealized version of the future?
- Do BIPOC communities have autonomy in your vision?
- How are heteronormative, ableist, colonial and/or capitalist values influencing your vision?
- How central are intersectional, anti-racist, and anti-oppressive considerations to your vision?
- Which BIPOC communities are you researching? Are you only choosing ones that align with your interests?
- 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 team's vision.

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 it is a tried and tested method among community organizers.

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

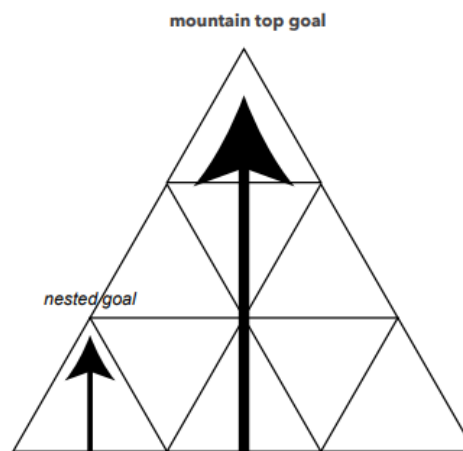
3.1 Mountaintop vs. nested

When the team decides its vision or shared purpose, the goal should fall within that. So if your vision is creating more communities built around active and shared public transportation, it wouldn't make sense to focus your goal on getting more electric vehicles for individuals. Your goal is one milestone to achieving your vision. One vision might encompass many goals, but we recommend you only focus on one. Focusing on one goal allows you to take realistic and time-bound steps to achieve something that may seem massive when you begin.

Goals will help 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 your teams.

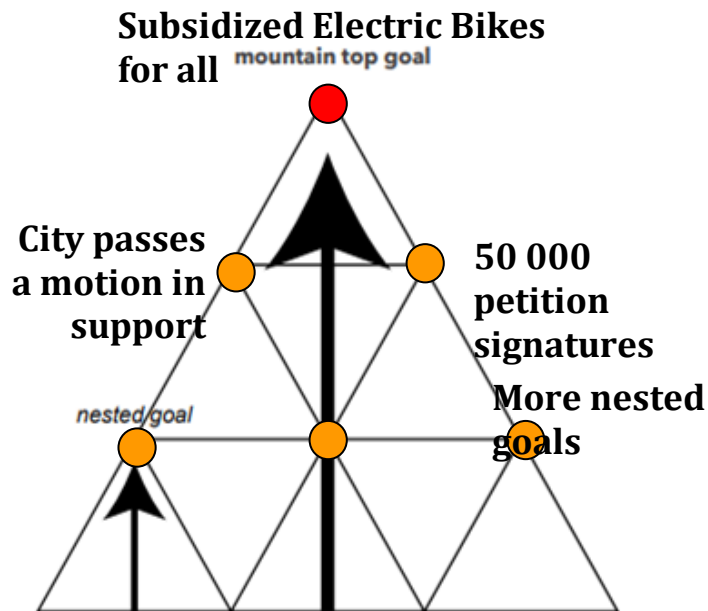
There are different types of goals and different ways to categorize them. The two ways you can look at goals is by categorizing them as *mountaintop goals* or *nested goals*. A mountaintop goal is often vast, broad and general. It is a goal that you are actively working towards achieving, and is meant to be worked on throughout your team's lifespan. If your vision is to create more communities built around active and shared transportation, your mountaintop goal could be to get the province to fully cover the cost of an electric bike for any person who wants one. It's hard to formulate clear steps to achieve that goal, so creating a nested goal to help move you toward that larger goal is important. A nested goal is a smaller, more specific and manageable goal as a stepping stone to your mountaintop goal.

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



Example:

- ❖ *Vision* is for every single person to have access to safe, affordable, efficient, and emissions-free transportation
- ❖ A *mountaintop 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.



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 remember that not all these goals have to be on you or your team to achieve. There are many teams out there working for change just like you!

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. 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.



When finding and creating a goal with your team, make sure to consider the interests and vision of your larger community.

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 the rocks as 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.

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 How to choose your goal

Here are some things to think about and processes to consider as you are choosing your goal.

1. Brainstorm goals with your group based on research and discussion with your larger community
2. You will likely find common problems in your brainstorming. Try to group these together. For example, you could group every problem that involves bikes together, or group every problem that deals with transportation together.
3. Figure out where the power lies. You will need to decide which group items have the most community support behind them and which are most valuable to your team. Power could include community support, mainstream momentum, or a decisionmaker who is pushing for policy change.
4. Consider choosing your top three goals and sending out a survey to your community for feedback. This is important because it helps cultivate acceptance of your goals by the community and ensures your goal isn't going against the community vision.
5. Create one SMART goal as a team.

4. Strategy: your pathway towards your goal

If the goal is the intended outcome, then the strategy is the route you take to reach that outcome. It is not choosing actions to take or events to hold, 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 desert 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: [\(Info on this can be found here\)](#)

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

- B. IF we show there are businesses that support a car-free street,
THEN the city council will build one on either Columbia or 6th & 6th Street,
BECAUSE business stakeholders are valued by the council.

Strategy:	Tactics:
<p>A</p> <p>Show city council there is public support for a car-free street on Columbia street.</p>	<p>Find allies: reach out to stakeholders and set-up meetings to see if they could be allies.</p>
	<p>Get letters of support from stakeholders.</p>
	<p>Petition - start canvassing at key festivals and community events.</p>
	<p>Emails & Media: send letters to the editor, post op-eds, post social media blasts, post info on website about campaign (e.g., videos, pics, inspirational and educational).</p>
	<p>Car Free Columbia Street designs: Reach out to any local artists for art concepts on Columbia St. being car-free.</p>
	<p>Educate the Public: presentations on what a car-free street can offer to New Westminster.</p>
	<p>Get the public to write letters and speak to city council in support of a car-free street.</p>
	<p>FINAL BATTLE: get people out to city council when an important motion is brought forward regarding car-free Columbia St.</p>

<p>B</p> <p>Show city council there is business support for a car-free street on Columbia street.</p>	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 endorsement 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, 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, 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/strategy might face. You need to understand each strategy based on all the community research and information you have collected to be able to make this decision.

Work with your team to gain information on the following questions to help inform and develop your 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?

It's important to explore strategy with an understanding of how the goals, and potential strategies, will impact the community. Have you spoken to marginalized groups? 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.

Bring these community members to your table, establish a relationship with them and offer compensation for their labour. In doing so, you are resisting the 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 to get to 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. Often organizers think that the

reasoning and assumptions behind a strategy are implied, but writing it out can help you identify flaws.

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.

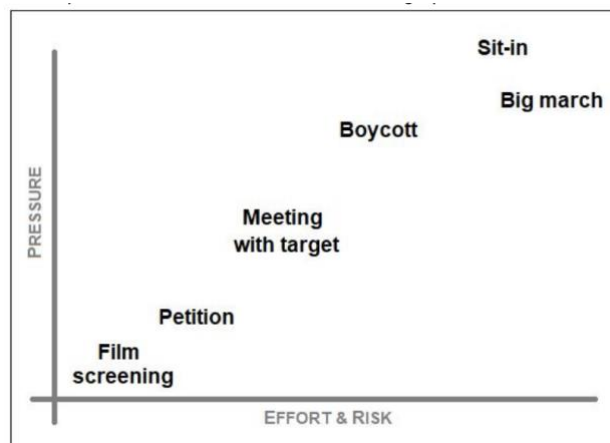
A Theory of Change is a theory in the true sense of the word - it is, as of yet, untested. No one else has successfully made the specific change that you are trying to - if they had, then you wouldn't need to make it! That's the challenging part of changemaking - there's no specific instruction manual 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.

Success in changemaking comes from very intelligent adaptation, 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 team's capacity as well as risk. Risk, in this case, refers to how confrontational the action is to decision makers. 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.

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 article: [Iceberg Model](#).

Deeper change is more effective for the same reason that weeds need to be pulled out by their roots 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.

5. 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 most fun part: deciding on your tactics – the actions you take 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.

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

5.1 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? When? What? Who?
- b. Roles & Responsibilities?
- c. Visuals and Materials?
- d. Media (if needed)?
- e. Following-up with people who come out (recruitment)

5.2 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 team's 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 create 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:

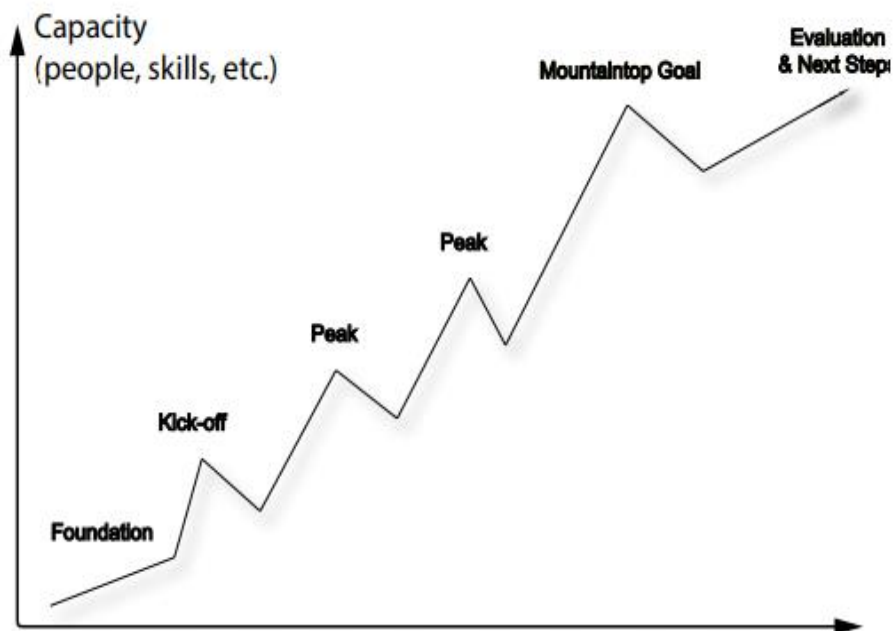
- ★ How many people do we want to show up?
- ★ How many people do we realistically think we can get to show up to city council?
- ★ How many people can we convince to speak?
- ★ How many people are necessary to sway councillors to vote in favor?

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.

6. Further references

- ❖ [Leadership, Organization, and Action Guide](#)

- It is an in-depth guided process for how to complete strategy planning.

- ❖ [Campaigns 101](#)

- *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.

- ❖ [Organizing 101 Crash Course](#)

- Sustainability training about momentum organizing and mass non-cooperation and goal-, strategy- and tactic- building.