

Planning your campaign

Campaigning is often shrouded in mystique. It is seen as something that some people have a natural instinct for – that you can either do or you can't. Campaigning is actually quite easy, though it is often hard work! The secret to an effective campaign is good planning and effective monitoring. These are all skills that are easy to learn and in fact are skills that most people already have. If you ask yourself the following simple questions you will have created a campaign plan that will be easy to follow and monitor.

What do you want to achieve?

Before you can decide on any campaign activity or any plan, you need to ask yourself why you are doing it. Identifying your reason for a campaign will inform the tactics that you should use and the people that you want to influence. This seems obvious, but all too often people decide that they want to campaign on an issue and choose a tactic before they have really worked out what they want to achieve. Decide on an aim for your plan and keep that clearly in mind whenever you are thinking of a tactic to use.

Your aim should be relatively simple and have a defined outcome. This is essential if you are going to monitor your plan and decide when you have been successful.

The aim of 'recruiting more members', for example, is too broad. How will you know when you have achieved it? Does this mean recruiting just one more member will be a success, or are you looking to reach a specific target? This aim could be rephrased as, achieving 50% density, or increasing membership by 10%.

You will also need to have some idea of the timescale for achieving your campaign aim. Having an aim of recruiting an additional 10% of members seems clear and simple. However, do you want to achieve this by the end of the year or just at some point in the future? Unless you are clear about your timescale you are not going to be able to monitor or evaluate the success of your strategy.

Following this line of questions you could end up with an aim such as 'we will increase our membership by 10% by the end of the academic year'. This is clear, simple and defined. At the end of the year you will be able to look at your membership figures and see whether you have increased by 10% or not.

In this example it is quite easy to work out your aim. However, with some campaigning issues it can be a lot more complicated. Many campaigns spring from a sense of injustice or anger, where the over-riding emotion is 'we have got to do something about it' or 'we

have got to stop them'. This is often closely followed by suggestions of tactics: 'let's have a demonstration to stop them' or 'let's tell the press'. While it is really useful to have that sense of involvement and anger, you need to be clearer about what 'doing something about it', or 'stopping them', means.

For example: 'we must take action against the management's proposed restructuring'. As an aim this does not really mean very much. You need to ask the question 'why?' Are you simply against any restructuring or do you disagree with what is proposed? What are you really trying to achieve? Is it to prevent people losing their jobs, or to protect current grades? Is it simply that everyone agrees a restructuring is necessary and the problem is that management are refusing to consult properly? This aim could be rephrased as, 'we will prevent any members from losing their job as a result of the proposed restructuring'.

Who needs to be influenced to achieve this aim?

Draw up a clear list of all of the people that you need to persuade to achieve your aim. In the recruitment campaign this could be a relatively short list – you need to influence the non-members. For the restructuring campaign the list might be longer and could include the vice-chancellor, council, senate, the relevant dean or director. This list is likely to change as you go through the planning process and decide upon tactics. It will also change depending on your answer to the next question.

How can decision-makers be influenced?

Look at all the factors that would influence the decision-makers. If you are thinking of influencing non-members in your recruitment campaign then you need to consider things such as: using other members to target them, using friendly heads of departments, using departmental representatives to talk to them one-to-one. If you think that these are the ways in which they can best be influenced then you need to add members, heads of departments and departmental representatives to your list drawn up in the question above. You might also think that they would be influenced by a strong campaigning trade union and decide to run another campaign to demonstrate that this is what you are. If you do choose to do this then be very careful about remembering your aim – you could end up running a really successful campaign on a local issue but forgetting to recruit while you are at it!

In relation to the restructuring campaign, then the factors could be very different. Your college or university management might be more influenced by local media or by the local MP. In that case you need to add the media and politicians to your list drawn up for the previous question. They might also be influenced by involvement from national UCU or your regional official. Working out the pressure points for the decision-makers will directly influence the tactics that you choose to use.

What resources do you have?

Before you can plan any activities you need to decide the level of resources that you are able to put into the campaign. This means looking at everything from basic financial resources, to the number of people that you can use. You should also include such items as the branch/LA newsletter and website, national publications, regional UCU staff and paid administrative support. This is the stage that most people try to skip, but it is fundamental to the process. It is no use deciding to run a major campaign, only to discover that all of the people that made the decisions are going to be too busy to get involved.

What are your tactics and your objectives?

This is similar to setting your aim. It is identifying the specific actions within your overall plan. Defining your objectives will produce a timescale and a rough outline for your campaign. For example, if you are running the recruitment campaign you could decide that you want to use your departmental representatives to recruit directly in their departments. This would mean that you would have to map out the current membership in the departments and ensure that your representatives were confident in what they had to do.

If you were planning the campaign over the summer your objectives could read:

- ensure accurate membership information is mapped onto departments by end of August
- ensure representatives are trained by end of September
- build the membership by 5% by December.

You can then break up your objectives into specific tasks:

- obtain a current membership list from head office by August
- obtain a full staffing list from personnel by August
- use the paid administrator to map out current members and non-members by the end of August
- run training session for departmental representatives in September
- get each representative to talk to ten non-members in their department by November
- expect to have increased membership by 5% by December.

You can then assign these specific tasks to individuals.

How are you going to monitor your campaign?

As you have already set out a clear list of tasks and responsibilities, you should be able to monitor the success of your campaign quite easily. Perhaps you could form a campaign committee that meets regularly and reports back to the rest of the branch/LA executive, or you may choose to ask one person to take responsibility for overall coordination and use them to report back to everyone else. Running a campaign can be extremely stressful and it is always better to involve people and delegate responsibilities.

Monitoring is absolutely crucial to the success of a campaign. You need to check that your plan is working and to review it if there are problems. Often events will happen that have a direct bearing on your campaign, and which you could not have anticipated when you first started planning. These can be threats or opportunities, but whatever they are, you might need to build them into your campaign plan. Do not be afraid to make changes to your plan if you have to, though you also need to avoid being sidetracked onto something completely different. When you are assessing your campaign remember to go back to your original aim. While an event might look fun or important, is it relevant and does it help you to achieve your aim? If it does not then you might have to ignore it and move on.

Do not think that your campaign is set in stone. Just because it looked great when you wrote it does not mean that it will work. There is no point with continuing with a tactic when it clearly is not working. Do not be afraid to challenge your original assumptions. Do not be afraid to ask for help. Sometimes you can get too close to your campaign and lose your objectivity. Checking your plan over with a friend or with someone from outside your college or university can be extremely useful.

Monitoring also allows you to recognise your successes. If you achieve your objectives then you should make sure that everyone knows about it. Remember to thank people – if they think that they are valued then they are more likely to help you in the future.

The most important campaign lesson is that there is no such thing as a perfect campaign model. Every campaign will be different depending on the targets and resources that are available. Just because something worked somewhere else does not mean that it will work for you, as it all rests on so many factors. Although the local press may influence one principal or vice-chancellor, another might simply become angry and more stubborn. Your environment is constantly changing and your campaign plans must change too. In the same way, where one tactic worked one year, it might not work again and you need to be flexible in your planning.

Checklist

- Define your aim.
- Identify your target groups to influence.
- Identify your means of influencing them.
- Identify your resources.
- Identify your tactics and objectives.
- Ensure that you have a timescale built into your objectives.
- Ensure that someone has responsibility for specific tasks.
- Ensure that you have a means to monitor your plans.
- Review the successes and failures and make changes where necessary.