

Useful Tools for Your Campaign Phases



For each phase of your campaign, the Center for Tobacco Policy & Organizing recommends using specific tools and exercises to help your coalition or campaign team be more effective and strategic in its efforts. However, many of these tools are really guides for the entire campaign and their usage should not be limited to a single phase. Essential documents such as the Circles of Influence and the Assessing the Political Environment Checklist should be referred back to and utilized throughout the campaign. Below is a matrix of tools that you can use in your campaign throughout each of the five phases.

As a reminder, here are the five phases of a campaign:

PHASE 1—PRELIMINARY INVESTIGATION AND ASSESSMENT

You will need to assess the political environment to identify local problems, issues and resources which might impact your campaign, gather public health data, and understand other factors which could influence decision makers.

PHASE 2—STRATEGY AND PLANNING

The public health and political environment information collected during Phase 1 informs the development of your campaign strategy during this phase. The primary activity of this phase is to develop a preliminary strategy using the Midwest Academy Strategy Chart.

PHASE 3—RECRUITMENT

Before contacting elected officials or the media, it is time to reach out beyond your core supporters and involve more people in your effort both as core supporters, and as allies or endorsing organizations.

PHASE 4—THE CAMPAIGN

This phase takes the plan developed in the strategy chart and implements it. Don't forget to review campaign tactics with all of your new allies.

PHASE 5—IMPLEMENTATION & EVALUATION

Once the policy campaign outcome has been achieved, it is critical to have a strategic plan to ensure that the provisions of the policy are implemented and enforced.

Matrix of Useful Tools for Your Campaign Phases

Tools/Phases	Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
Success in Policy Campaigns- Five Phases to Victory	X				
Assessing the Political Environment Checklist	X	X		X	
Circles of Influence	X	X	X	X	
Elected Official Profile Form	X	X		X	
Decision Maker Matrix	X	X		X	
Midwest Academy Strategy Chart	X	X	X	X	
Policy Wonk Materials and Center Matrices	X	X		X	
List of Education and Pressure Tactics		X		X	
From the Outside in or the Inside Out: Insider vs. Outsider Strategies		X	X	X	
Guidelines for Recruitment			X	X	
Tips: How to Make a Pitch			X		
3 People I Want to Recruit			X		
Preparing for a City Council or Board Presentation: A Checklist				X	
Meeting with Elected Officials: Pre-Meeting Checklist				X	
TALC/Center Policy Ordinance Checklist		X		X	X
TALC Model Ordinance		X		X	X
After Passing the Policy: What's Next? Policy Implementation & Enforcement					X