

SUCCESS IN POLICY CAMPAIGNS: Five Phases to Victory



The Center for Tobacco Policy & Organizing has developed this description of the five phases in a policy campaign to help you develop a strong and successful campaign. By following these phases, your campaign will not neglect essential early activities which set the stage for a successful campaign during Phase 4. The phases describe distinct periods in the campaign process and are generally to be completed in order. However, the phases presented in this document are guidelines, not unbendable rules. In fact, once you have completed a phase you should continue those activities throughout the remainder of the campaign – assessing the environment, refining your strategy, and recruiting new supporters.

PHASE 1 – PRELIMINARY INVESTIGATION AND ASSESSMENT (4-8 WEEKS)

The purpose of the preliminary investigation is to solidify your policy goal and the specific city or county which will be the target of your efforts. 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.

Conduct informal interviews with a number of people; talk to people within your office, your coalition, and your community about past experiences with this issue or similar and related ones. This has the added benefit of being a low key way to gain support for your effort.

Several tools you and your coalition can use to assess your political environment in a way which will contribute to developing a winning strategy include the Political Environment Checklist and the Elected Official Profile Form. You can also enhance your assessment of your political environment through key opinion leader interviews and a public opinion survey.



Stick to the phases if you can, but remember, creativity in the campaign process and sensitivity to the needs of your local group are important qualities of successful campaigns.

PHASE 2 – STRATEGY AND PLANNING (8-16 WEEKS)

The public health and political environment information collected during Phase 1 informs the development of a campaign strategy during this phase.

The primary activity of this phase is to develop a preliminary strategy using the Midwest Academy Strategy Chart. Along with the Strategy Chart you will establish a rough timeline for the campaign. Involve people in developing the strategy chart who you think will be core members of your campaign coalition, but don't forget to include others who may have critically needed knowledge and experience such as political consultants, former elected officials, and key community leaders.

Several tools you and your coalition can use to enhance your strategy discussion include the Decision Maker Matrix and the Circles of Influence.

Because developing the ordinance language is a strategic as well as legal decision, this phase also includes the development of the ordinance with the Technical Assistance Legal Center (TALC).

PHASE 3 – RECRUITMENT (8-12 WEEKS)

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-needed, down-the-road supporters.

In this phase, you and your coalition will need to: conduct activities aimed specifically at recruiting new supporters, train your core group to conduct one-on-one recruiting meetings with key opinion leaders, make presentations to organizations, have one-on-one meetings with prospective new coalition activists, and attend community social events.

All of these recruitment efforts won't automatically lead to new members at your coalition meetings and this phase takes more time than you might expect. But you may identify people with special skills and contacts who can help on specific tasks later in the campaign.

At the end of this phase the campaign team will plan and facilitate a campaign "kick-off" event to begin the more high profile part of the campaign.

PHASE 4 – THE CAMPAIGN (4-8 MONTHS)

This phase takes the plan developed in the strategy chart and implements it.

But before moving forward, revisit the strategy chart and timeline with the newly recruited campaign team members. In particular, review campaign tactics since they need to be compatible with the coalition or campaign committee including the new members.

Now you are in full campaign mode. We recommend creating four action teams to efficiently implement the strategy chart: 1. Drafting the ordinance (to work with TALC), 2. Media (to write letters or articles), 3. Action (to collect organizational support, or letters of support, conduct surveys of youth or adults), and 4. Speakers bureau (to give many presentations to community groups to get their support).

PHASE 5 – IMPLEMENTATION & EVALUATION

After the ordinance has been adopted, the next challenge is making sure that responsible agencies implement and enforce it. Start by researching how the policy should be implemented in order to be effective.

It is critical to renew relationships with elected officials and staff developed during the campaign to pass the policy and to develop new relationships with staff involved in implementing the policy.

Many tobacco control policies are self-enforcing or complaint driven, so enlist the public as an ally in the implementation and enforcement effort by increasing public awareness of the policy.

Evaluate the effectiveness of the implementation and enforcement effort. Work with the Tobacco Control Evaluation Center for more direction. Use the evaluation results to leverage greater enforcement if necessary, or as the basis for publicizing the policy's success.



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