

Strategizing

Key Concepts

- We devise strategy by asking first, "who are our **people** and what is their **problem**?" before deciding on our **goals**.
- **Strategy is made up of "nested goals"**: smaller, measurable goals that we achieve incrementally in order to meet our larger, ultimate goal.
- A "**theory of change**" statement summarizes our strategy, and provides us with a strategic blueprint for how we plan on making change.

What is strategy and how does it work?

Simply put, **strategy is turning what you have into what you need to get what you want.**

What you have is your **constituency's resources**: people, time, skills, money, experiences, relationships, credibility, your allies, supporters, your leadership.

What you need to achieve the **change you want is power**. Power is gained through tactics that can creatively turn your resources into the capacity you need to achieve your goal.

What you want is your **goal**. Your goal is a clear and measurable outcome that allows you to measure progress along the way.

To illustrate strategy, we will use a classic organizing example: the 1956 boycott of the bus system in Montgomery, Alabama. In 1956, as part of regional racial segregation policies, African-American or black passengers had to sit at the back of the bus, and white passengers at the front. If the bus was full, black passengers were forced to give up their seats for white passengers. Demanding a change to these rules, black passengers boycotted the bus system, depriving the system of substantial revenue. 381 days after the boycott started, the bus system was desegregated.⁵

Strategy is **motivated** by an urgent challenge

We strategize in response to an urgent challenge or a unique opportunity to turn our vision into specific goals. We commit to the goal first, then develop how we will get there. Think of the Montgomery Bus Boycott - *what challenge did the leadership of the boycott respond to? What was their motivating vision?*

⁵ For more information on the 1956 Montgomery Bus Boycott, see Branch, T. (1989). Chapter 4: First Trombone. *Parting the Waters: America in the King Years 1954-63*. New York, NY: Simon & Schuster Inc.

Strategy is **creative**

Challenging the status quo requires making up for our lack of resources by using the resources we do have intentionally and creatively. During the bus boycott, the leadership turned the resources of their constituency (a bus fare) into power by mobilizing that resource collectively.

Strategy is a verb, and is an **ongoing process**

Strategy is something we do, not something we have. Strategizing is not about creating a static strategic plan at the beginning of a campaign and implementing it. Rather, we continually strategize as we implement our strategic choices and change our strategy in response to what happens. In this way, we 'act our way into new thinking' rather than 'think our way into new acting.'

Strategy is **collaborative**

Strategy is most dynamic and effective when the group responsible for strategizing brings diverse experience, background, and resources to the table.

Strategy is **intentional**

Strategy is a theory of how we can turn what we have (*resources*) into what we need (*power*) to get what we want (*achieving goals*). We call this a "**theory of change**," and will discuss it later in this section.

How to strategize

When strategizing, we ask ourselves three questions:

1. Who are our PEOPLE?
2. What is the PROBLEM?
3. What is our GOAL?

Step 1: Who are my people?

When strategizing, there are different distinct groups we need to consider: our constituency, and within it our leadership, our supporters, our competitors, and our opposition. See page 47 in the Appendix for the "Tracking down the power" exercise to help you map out and prioritize your people.

Constituency

Constituents are people who have a need to organize, who can contribute leadership, can commit resources, and can become a new source of power. An organizer's job is to turn a **community** - people who share common values or interests - **into a constituency** - people who have committed to act on behalf of those values or interests.

Leadership

Although your constituency is the focus of your work, your goal as an organizer is to draw upon leadership from within that constituency. The work of these leaders, like your own, is to accept responsibility for enabling others to make change. They are accountable to their constituency, represent the constituency to others, and support members of the constituency in achieving shared goals, together.

Supporters

People whose interests are not directly or obviously affected may have an interest in backing an organization or effort's work. Although they may not be part of the constituency, and are not directly involved in making change, they may have similar values and resources to contribute. For example, non-indigenous Canadians that are not directly affected by infringements on aboriginal rights may have similar values and be able to contribute resources (e.g. logistical support, money) to campaigns run by Indigenous Peoples.

Competitors

These are individuals or organizations with whom we may share some interests, but not others. They may target the same constituency, the same sources of support, or face the same opposition. For instance, two unions trying to organize the same workforce may compete or collaborate, or two community groups trying to serve the same constituency may compete or collaborate in their fundraising. When strategizing, identify competitors and, where possible, take steps to turn them into supporters.

Opposition

In pursuing their interests, constituents may find themselves in conflict with the interests of other individuals or organizations. An employer's interest in maximizing profit, for example, may conflict with an employee's interest in earning an adequate or living wage. The interests of a Liberal candidate conflict with those of the NDP candidate in the same riding. At times, however, opposition may not be immediately obvious, and might emerge only during the course of a campaign. When strategizing, identify your opposition, consider how they will respond to your organizing, and how you can respond in turn to neutralize their oppositional actions.

Step 2: What is the problem?

Now we need to analyze the problem by asking three questions: *What exactly is the problem we're trying to solve? Why hasn't it been solved? And what would it take to solve the problem?*

What is the problem?

What is the problem facing our **people**? To be most effective as an organizer, you should seek to enable your constituency to change an intolerable circumstance. In the Montgomery Bus Boycott example, the people were black residents of Montgomery, and their intolerable circumstance was a system of racist segregation policies.

Why hasn't the problem been solved?

Who has the resources to solve the problem? Why haven't they used them to solve the problem? Do we know how to solve it, but just lack the necessary resources? Or do we need to first figure out how to solve the problem?

It's important to look at the history of this problem to understand what has been tried (if anything), what failed, and why.

What would it take to solve the problem?

To determine how we will solve the problem, we develop a **"theory of change."** A theory of change sums up *how what we do will result in the change that we want*. In community organizing, the theory of change is based on power relationships, and in this context, power is not something that you have by virtue of the position you hold in an organization. Instead, organizers understand power as the influence created by the relationship between interests and resources.

We assume that the world is the way it is because some people benefit. We also assume that these people currently have more power than us and are therefore able to maintain the status quo. Community organizing, then, focuses on power: who has it, who does not, and how to build enough of it to shift the power relationship. That shift is what makes change.

In organizing, we conceptualize two kinds of power: "power with" and "power over." Understanding which type of power is involved in the problem we are facing helps us decide how to approach the problem.

Power with: Sometimes we can create the change we need just by organizing our resources with others, creating power with them. All organizing involves power with. For instance, creating a community credit union or a community run day care are examples of 'power with' community organizing.

Power over: Sometimes others hold power over decisions or resources that we need in order to create change in our lives. In cases like these, we have to organize our power with others first in order to make a claim on the resources or decisions that will fulfill our interests.

When we have to engage those who have power over us in order to create change, we ask ourselves five questions:

1. What change do we want?
2. Who has the resources to make that change?
3. What do they want?
4. What resources do we have that they want or need?
5. How could we organize those resources to give us enough leverage to get what we want?

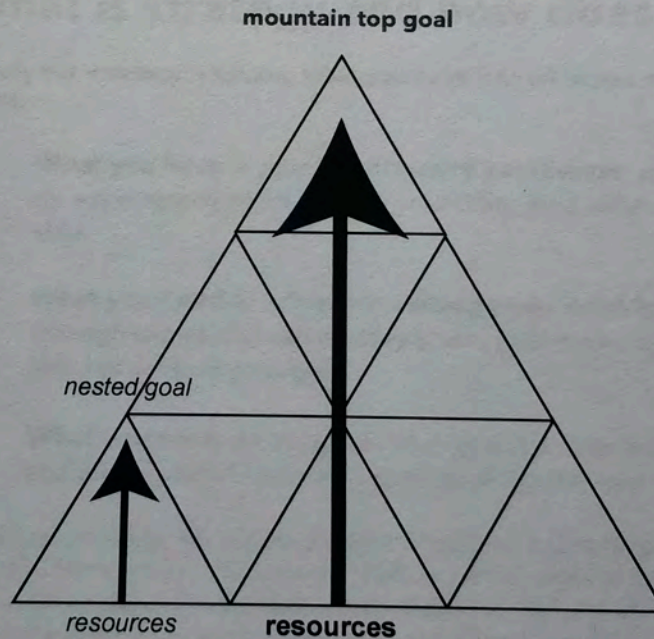
Once we have answered these questions, we're one step closer to deciding on our strategic goal.

Step 3: What's the goal?

A strategic goal should be **clear and measurable**. Choosing your strategic goal is the most important choice we make in designing a campaign.

No one strategic goal can solve everything. In order to put our resources to work solving our problems, we have to decide where to focus. We must ask ourselves: *what goal can we work toward that may not solve the whole problem, but will get us well on the way to solving the problem?* Unless we choose a goal to focus on, we'll risk wasting our precious resources in ways that just won't add up.

Remember, strategy is nested; a campaign's ultimate goal, or the "mountain top" goal, is likely not achievable in one attempt (see diagram 12). Instead of chasing after the mountain top goal all the time, we can set smaller, nested goals that help measure incremental progress throughout the campaign. Nested goals may take place over time (e.g. a local campaign for a municipal living wage policy may start with electing supportive council candidates before moving on to pushing for an actual bylaw), or over a geographic area (e.g. a provincial election in British Columbia may have up to 85 nested goals, one for each provincial riding a party or group wishes to influence).



An **effective strategic goal**:

1. Is **measurable**, ideally as a number with units (e.g. people, votes, dollars, hours, etc.).
2. **Focuses resources** on a single strategic outcome.
3. **Builds the capacity** of our constituency.
4. **Uses a point of leverage**: our constituency's strength or our opposition's weakness.
5. Focuses on a **motivational issue** that is visible and significant to our constituency.
6. Can be **replicated or emulated**.