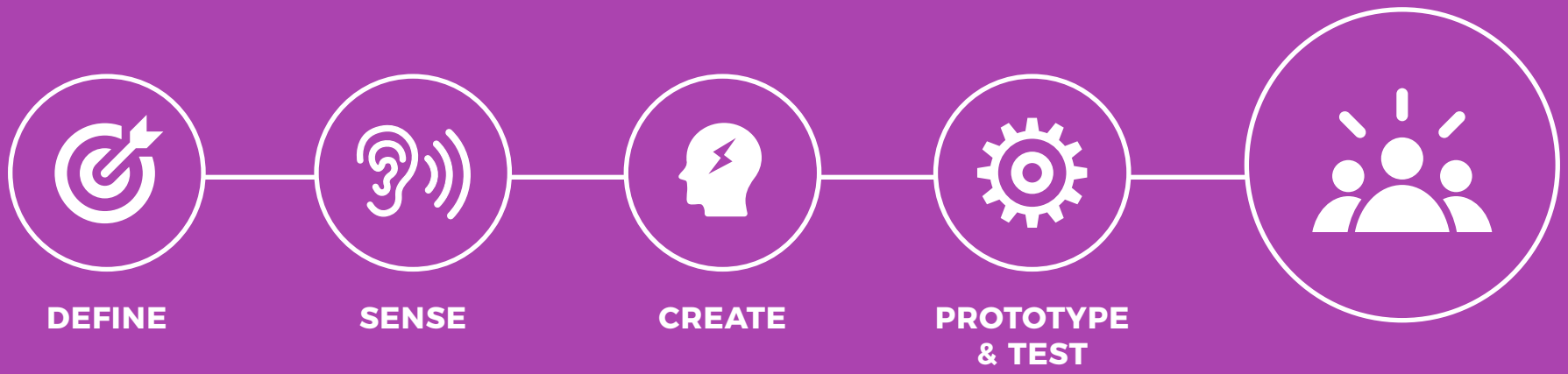
CAMPAIGN ACCELERATOR TOOLKIT

Module 5

PLAN & PITCH



The Campaign Accelerator blends high-performing campaign strategy tools with proven methods inspired by design thinking. This is a practical guide for planning campaign projects that put people at the centre of our efforts for change through a collaborative process that involves the entire project team using visual templates, methods and exercises.

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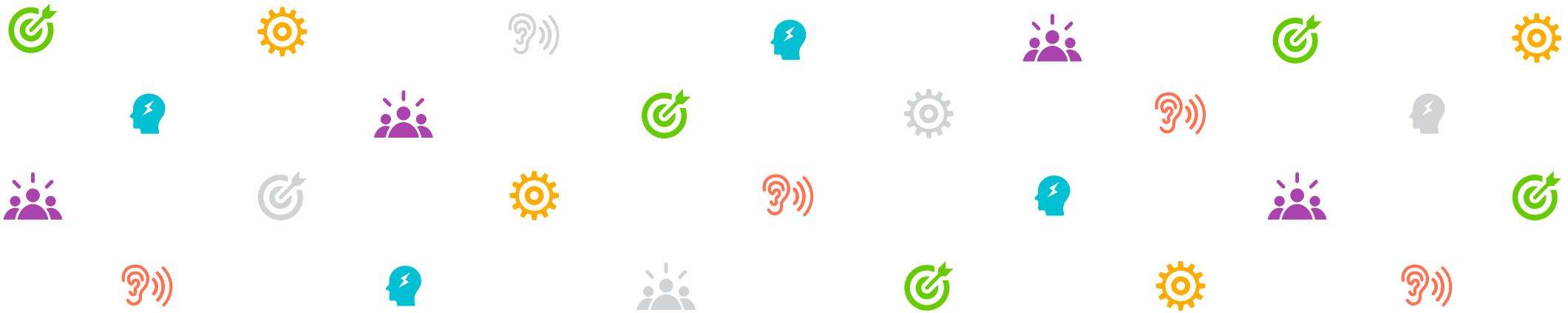
These tools are presented in the order we use them to complete this process, however...you may not need all of these tools for your project. Start by evaluating the tools and which ones make sense for your project to map out the path and methods you will use to get where you need in this final stage.

Throughout the guide you will also find some tips from experienced users of these tools. Send us your tips to add to the guide.



About Campaign Accelerator

This is a participatory process.

By bringing together project teams with diverse skills and perspectives to develop strategy and tactics through participatory exercises, integration is baked in and brings greater team alignment.

People are at the centre of our planning.

Throughout the process we involve people outside the project team — allies, supporters and people we wish to engage — to gain insight, inspiration and test ideas to make them fit for purpose.

These are practical tools.

They are a blend of campaign strategy tools, including system thinking, and human centred design that can be combined in different ways to create a process that works for your team.

This is a work in progress.

Everything in this toolkit is a prototype. We are constantly testing, evaluating and learning how to improve this process and we invite you to provide feedback on the methods and tools to improve it based on your experience.

This approach is flexible and adaptable.

This process isn't intended to be linear. You may need to iterate several times to get to your solution. We encourage you to adapt, hack and improvise to improve on what you see here.

Introduction

People powered campaigns thrive on strategies that put people at the centre of change. It's a shift for many campaigns and campaigners, so we created the Campaign Accelerator to blend a systems approach to strategy with proven methods inspired by design thinking. We've found that this hybrid approach enables teams to build campaigns that engage more people in deeper, more powerful ways, quicker. By accelerating the planning process we can get campaigns out the door faster, and learn and adapt from our campaigning to create more effective people powered campaigns.

This is an action-based process. We develop ideas and test theories. We get out of the meeting room and work with key audiences. Over five days, the plan evolves and gets refined. By the end of the five day programme, teams generate a project plan with clear next steps based on an analysis of the problem and solution, audience feedback, and tested ideas that address the campaign challenge. Teams also walk away with processes and tools for radical collaboration and planning that can be taken forward and used long after the Accelerator ends.

We have presented the Accelerator here as an intensive 5 day process, but **how you use these tools is up to you.** You can break it down and develop your plan over a longer period or select a few tools and methods to create a campaign in a day to respond to current events. In reality you'll find the process is not linear; you may revisit these tools and techniques many times as you learn and develop the campaign based on feedback.

Are you ready for a people powered approach?

The Campaign Accelerator puts people power at the centre of the strategy and campaign planning process. No matter how many skilled staff and volunteers we claim, it will take more than our individual organisations to create and sustain the change the world demands of us. People powered movements are transforming the world — and our work.

By building strong and effective people powered strategies into our campaigns and projects, we can enable countless individuals to take an active role in change-making. The result: more campaigns, more wins, bigger victories and sustained movements that can scale to take on the enormous challenges our planet and humanity faces.

While there may be other strands of work your organisation or team takes on to deliver change, in this process we focus in on who can help us create change and connect with them through this process to inspire campaign stories, activities and engagement.

Before embarking on this process, your team and key decision makers need to be committed to a people-powered approach to campaigning.

To learn more about people power, download the Mobilisation Cookbook.

Are you ready for a participatory approach?

Collaboration is one of the core values of this approach. Team members contribute equally throughout the process by relying on diverse perspectives and expertise. Together, problems are identified and solutions tested, building a culture of collaboration that lasts beyond the planning process.

Team members have remarked that there was no difference between roles during the process. By bringing together project teams with diverse skills and perspectives to develop strategy and tactics through participatory exercises, integration is baked in and brings greater team alignment.

Alignment on strategy and plans through the process brings higher levels of autonomy during implementation. While the team will agree the strategy, creative direction and big elements together, other details of the plan can be developed by those with specific expertise. This means the team is able to focus on the big picture together instead of small details.

This can create a level of internal disruption which surfaces current power dynamics and provides an opportunity to transform them. Those people who have traditionally held power over decisions need to be open to everyone's perspectives and input during the process and willing to share power and decision making with all team members in order for this collaborative approach to be successful.

Why do we take a systems approach?

Often the problems we are trying to solve are deeply complex and are part of larger integrated systems. When we try to create change and "fix" just a part of that system, the system often adapts and the problem reappears somewhere else. In order to create lasting change that addresses the root of the problem the whole system needs to be transformed.

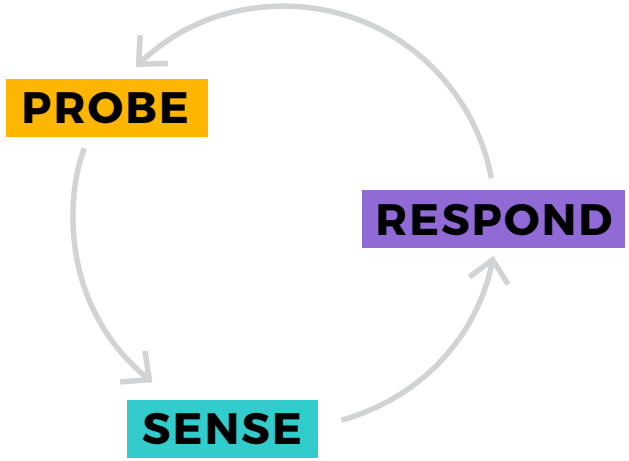
When our aim is to transform the system, we need to explore and understand the whole system including its many components, players and the relationships between them.

Because systems are complex and dynamic, it requires us to embrace a process of real world experimentation, learning and adaptation.

Most of today's major crises are tied up within complex economic, political and social systems; they are global and deeply cultural. To understand these complex systems and how we can create change and transform them we need to take an approach that is based on probe-sense-respond. We probe the system by creating experiments and testing assumptions. We sense by listening, evaluating and integrating feedback from our experiments into our understanding of the system. And we respond by changing our experiments and adapting our strategy or scaling what is working to disrupt and transform the system.

This approach is built into the Campaign Accelerator process by exploring what we currently know about systems, challenging our assumptions, generating ideas and seeking feedback and adapting ideas. It is also an approach that needs to continue long after the Campaign Accelerator process in order to create systemic change.

To learn more about a systems approach to campaigning see SmartCSOs report Reimagining Activism, or the Greenpeace (draft) systems campaigning toolkit.



Why do we integrate design thinking in the process?

As organisations we regularly tackle complex issues that are the result of dysfunction in larger systems including poverty, environmental destruction, inequality and violence, and design thinking offers advantages for working within complex and dynamic environments.

Design thinking has earned a reputation for generating innovative new products and services. We're seeing the methodologies spread quickly throughout the international aid and development sectors, and the NGO / advocacy worlds are beginning to take note as well.

Design thinking has its roots in professional design traditions including ways of thinking and working. In order to engage non-professional designers in the process of design, these traditions have been simplified into a set of practices or tools and popularised under the terms "design thinking" and "human-centred design."

Design thinking requires cognitive skills other than deduction and induction, and this can sometimes be uncomfortable new territory for staff from NGOs which are more commonly influenced by scientific traditions. Yet as with any new skill, with practice and experience this approach can become natural or automatic.

We have integrated design thinking practices into the Campaign Accelerator because it is a process designed to tackle complex problems — problems where the solution is not known from the beginning. Design Thinking is a solution-focused process, one that recognises many possible solutions exist, and as we design solutions and experiment, we also learn more about the problem.

Adapting and including a design thinking approach in campaign planning develops empathy with audiences, challenges assumptions, and helps us better understand people's challenges and needs. The process includes field research and interacting with key audiences to uncover what inspires action. Gaining empathy helps remove the barriers between 'us' as staff and 'them' as people we wish to engage. This creates inspiration for innovation and greater creativity in our campaigns.

Design thinking uses prototypes to gather direct feedback on how and why people engage in and interact with campaigns. The process of prototyping, getting feedback and iteration is an essential part of the process and evolution of the solution. It also frees teams up to try wild ideas while minimising risks. Free from failure, participants find courage to try new things rather than sticking to what they already know.

There are many resources available online to learn more about design thinking, including free online courses from Acumen and IDEO.org.

How to use this guide

This process was created and optimised for project teams to turn around plans quickly — to spend less time planning and more time campaigning.

It works best for developing specific projects within a wider campaign. Teams should have completed their basic research and have a good understanding of the problem they are tackling and the context of the problem, even if they don't know their specific strategy yet.

Whether you're using this for a totally new campaign or to reinvigorate an existing campaign, you'll need to have a clear idea of what you want to get out of the process at the end so that you can adapt the process to meet those specific needs.

Each exercise comes with step by step instructions based on what we found works best with teams; you might have better ideas. Take inspiration from this, adapt it as necessary, and make it work for your team. Always keep your outcomes in mind. The process, methods and tools should serve the outcomes you need.

You may find some of these tools and methods useful for long term planning, or at specific points during implementation. It's up to you how to use them and when. We hope this guide will provide you with inspiration and a useful toolkit to create more responsive, people powered and impactful campaigns that spark system transformation.

What the Campaign Accelerator will not do

This toolkit will not deliver answers to all your questions or cover all the work you may need to address in the life of your campaign. (Sorry!) The process is about accelerating your planning and launching people-powered campaigns more quickly — which should allow you to learn from your campaign activities and adapt plans based on your experience.

The Campaign Accelerator probably won't replace all of your current campaign planning tools, templates and methods; hopefully it can supplement them, complement them and provide your team with some new ways of working to supercharge your campaigns.

With Gratitude

This guide is only possible because of the great work that has come before it. We are grateful for the inspiration and guidance these organisations have provided: Fantastic Studios, Greenpeace Response Lab, Grove Consultants International, Hyper Island, IDEO.org, Kaospilots, Nesta, SmartCSOs, Strategyzer and Greenpeace Mexico for providing incubation space.

Module 5: Plan & Pitch

Where are we?

Module 5: Plan & Pitch

Purpose

To turn the work you have done as a team by working through Define, Sense, Create, and Prototype into a plan you can take forward with clear next steps. You should generate an outline of a plan with enough actionable details and success indicators that the team is able to proceed with key activities, and establish how you will work together as a team.

Outcomes

Your specific outcomes will depend on what you want to accomplish during the accelerator, and the specific end products your team needs. The important thing is to agree as a team a plan for how you will take your strategy and ideas forward. This may include further research, sensing and testing. This guide is composed of the exercises we typically use at this stage to create a plan teams can take forward.

HOW TO USE THIS GUIDE: This guide is intended to bring together tools to help us integrate people centred campaigning into our plans. This is a living document. We want you to try these tools, test them, adapt them and to share your learnings with your colleagues and with us so we can improve on the guide. If you have feedback on this guide please email: **accelerator@mobilisationlab.org**

SECTION 1:

Missing Pieces

In this section you'll find exercises to help fill in some of the key pieces that are likely still missing from the plan you've been developing — your overall narrative, how you'll frame your call to action, key milestones and success indicators, etc.

Exercise 1:

Impact Stories

CORE FUNCTION: **YES**

CORE TOOL: **NO**

Level of difficulty:
Moderate

Time:
40-60 minutes

People:
In pairs or small groups, and then together as one group

Materials:
Post-its, markers

Purpose of this exercise:

Identifying impacts we expect to see from the campaign project including concrete outcomes and indicators of success.

Expected outcomes:

Desired outcomes, indicators of success and milestones.

Expected Campaign Canvas outcome:

Helps you fill in boxes 7 (outcomes and indicators) and 13 (tracking and measuring).

How this exercise leads to the next section:

It stands on its own.

Facilitation Pointers:

It might be worth beginning by defining “outcomes,” “indicators,” and “milestones” with the group so everyone is aligned.

Step by Step:

1 Divide team into pairs or small groups and ask them to imagine the successful campaign, and write one idea per post-it note (about 15-20 mins):

a. What is different externally if the project is successful? What might be different internally if successful?

b. What might happen along the way that would make them (this group) believe they are making progress towards these outcomes?

2 Bring them together to create a success timeline with all of their post-its (you can use this to start your project timeline — pg 247 — if you are using this exercise) with their outcomes and indicators.

3 Have them do some quick grouping of common themes and consolidate similar outcomes and indicators.

4 Facilitate a group discussion to identify and agree critical outcomes, indicators and key milestones to achieve change.

5 You can map these critical outcomes and indicators to box 7 of the campaign canvas.

6 Finally, explore with the team if there are any internal changes they would like to see as a result of this project, within the team or the organisation? Record the agreed internal outcomes as well.

Creating Impact stories.

Impact stories.

Exercise 2:

Narrative Buildout

CORE FUNCTION: YES

CORE TOOL: NO

Level of difficulty:
Moderate

Time:
60 minutes

People:
In small groups

Materials:
Flip chart, post-its, markers

Purpose of this exercise:

Identifying key elements of the story of the campaign project that you can test and refine, along with gaps that need to be filled.

Expected outcomes:

Initial sketch of how the campaign will appear to key audience groups, what the narrative arc might be, and gaps that require more work.

Expected Campaign Canvas outcome:

Helps fill in box 8 (What's the Story?), and perhaps some of 9 (What do people need to do?).

How this exercise leads to the next section:

It stands on its own, but could also be combined with the following exercise on a call to action.

Facilitation Pointers:

This could be a whole workshop on its own, and will likely need to have a subteam assigned to take forward and develop into a full communications and engagement plan.

You can also use the narrative elements from the Define module to create the new narrative.

Step by Step:

1 Identify 3-5 “characters” from whose perspective you want to explore the campaign. Possible characters could be a somewhat engaged supporter, a highly engaged activist, someone at an allied organisation, the CEO of a target company, the decision maker you’re ultimately targeting or someone who works for the decision maker, a sympathetic journalist, etc.

2 Split your full group into 1 group for each “character”.

3 Each group should construct their vision of the “past,” “present,” and “future” stories of this campaign, from the perspective of their character:

- Past: What led us here? Why is a campaign even needed?
- Present: This thing is happening. How does it appear? What gets seen? What needs to be in place for that?
- Future: The vision of what’s possible, both positive and negative.

4 Come back as the full group, reporting back on highlights.

5 Identify common threads, and also what’s missing. Assign action items to specific people to carry next steps forward.

Exercise 3:

Creating a Call to Action

CORE FUNCTION: YES

CORE TOOL: NO

Level of difficulty:
Moderate

Time:
60 minutes

People:
small groups or as one group

Materials:
Flip chart, post-its, markers

Purpose of this exercise:

Creating and communicating a people-centred theory of change that will motivate your audience to action that you can test and refine.

Expected outcomes:

Key elements of the campaign story, theory of change you can communicate and next steps to test story.

Expected Campaign Canvas outcome:

Helps fill in box 8 (What's the Story?), and 9 (What do people need to do?).

How this exercise leads to the next section:

It stands on its own, but could also be combined with the previous exercise on overall narrative.

Facilitation Pointers:

This could be a whole workshop on its own, and will likely need to have a subteam assigned to take forward and develop into a full communications and engagement plan.

Step by Step:

1 In people powered campaigns, our allies and audiences are the heroes of our stories, they are the ones who can power change in the world. Start with identifying who will be your heroes of the story — the main audiences you're speaking to and asking to take action? This may be one or multiple audience segments.

2 Divide the group into smaller teams. Based on your sensing and what the group know already about our audiences, each group should explore one of these questions. They should also identify what they don't know and what further questions they would like to explore with the audiences:

a. In what ways does the audience recognise that the current system is broken?

b. What myths or stories are preventing this audience from believing in change or getting involved?

c. What elements of the team's vision for the future can speak to this audience? What else might speak to them?

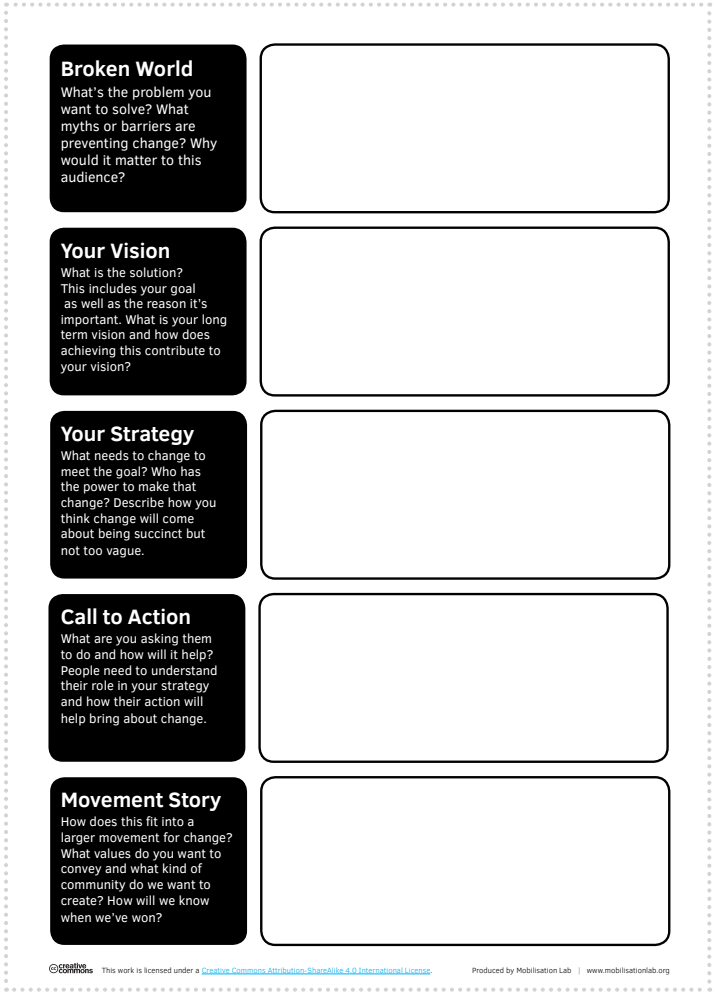
d. What will convince our audience that their action matters? How can we support that?

3 Bring groups back together to share their key findings.

4 As a team, identify key opportunities and uncertainties for storytelling. There can be several. Identify how you will get answers to your key questions and test storytelling opportunities.

5 Use the call to action worksheet to record your findings and build a story that you can test and refine with audience input.

Creating a Call to Action Worksheet



NOTE: When describing the problem, this could be a current scandal, introducing an antagonist or a myth or barrier that is preventing positive change. Remember to simplify the barrier to make it quick to identify and understand.

Download A4 Template

Download A1 Template

Exercise 4:

Engagement Pyramid

CORE FUNCTION: **YES**

CORE TOOL: **NO**

Level of difficulty:
Moderate

Time:
40-60 minutes

People:
In small groups

Materials:
Pyramid worksheet, pens, markers

Purpose of this exercise:
Building on your campaign concept to deepen engagement and commitment for your campaign project.

Expected outcomes:
Tactics for engaging people in different ways in the campaign depending on their ability and interest to contribute.

Expected Campaign Canvas outcome:
Content for box 9 (What do people need to do?).

How this exercise leads to the next section:
It will inform our thinking on elements of open campaigning.

Facilitation Pointers:

You can also adapt this exercise to use for idea development during the Create day of your workshop to generate ideas for activities that will engage people at different levels.

Step by Step:

1. Introduce the engagement pyramid with examples of what campaign actions looks like at each level.

2. Divide larger group into smaller groups to address 1-2 parts of the pyramid, depending on how many groups you have.

3. Small groups should spend time opening up for many ideas that could fit at that level related to the campaign project and across the duration of the project. Then select the best ideas and discuss where they think they would best be used in the project.

4. The small groups should come back together to share their top ideas, and create a complete pyramid together.

5. Allow time for discussion to evaluate whether the activities complement each other, is there anything missing, anything they disagree on? Facilitate agreement on the priority activities for each level and what would be nice to have.

Detailed Engagement Pyramid

Engagement Pyramid

Actions

(6) Leads Others: Engaged becomes the engager; Focuses on training others; Easily confused with staff

Organising others, recruiting donors, serving on board

(5) Ongoing, Collaborative Actions: Major investments of time, money, and social capital often blur; your org/campaign = source of passion

Publishing about your campaign, public speaking, deep volunteer involvement

(4) Multi-Step Assignments / Actions representing significant contribution of time, money, or social capital

Joins group, attends event, makes large donation

(3) Single-step or straightforward actions with low risk / investment

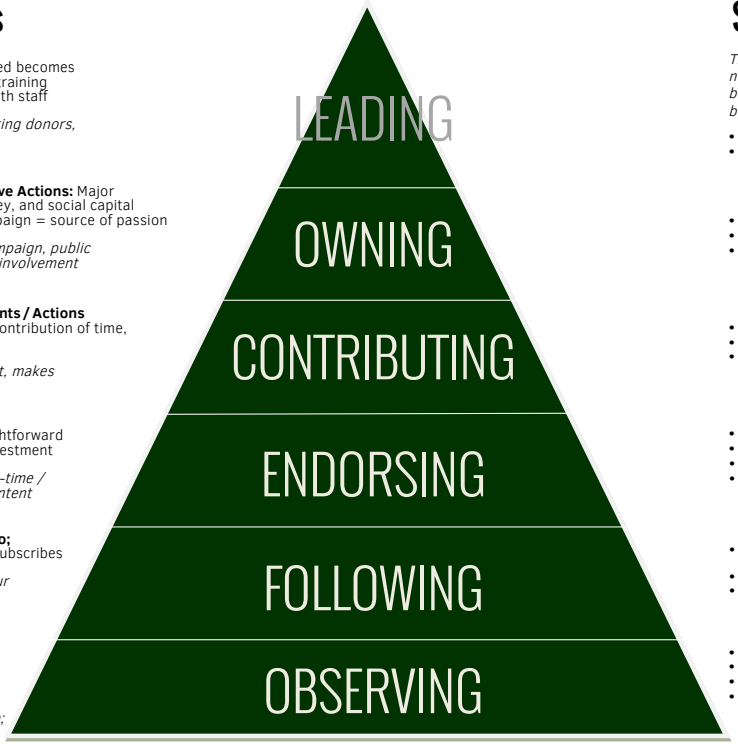
Signs petition, makes one-time / small donation, shares content

(2) Agrees to receive info; Provides contact info or subscribes

Reading and watching your communications

(1) Interested in cause; aware of org/campaign**:** Learning more via friend, DD, media, social media

Visits website / soc media; attends an event



Sample Metrics

The contributions of leaders can not be measured by metrics alone, but you may have qual and quant benchmarks such as:

- # Group/community leaders
- # Recruited by leaders

- # Fundraising leaders
- # Lead volunteers
- # NVDA action-takers

- # Regular donors
- # Regular vols/activists
- # Content creators

- # One time donors
- # Petition signers
- # People sharing
- # Participating in volunteer welcome program

- # Email subscribers (active within last year)
- # FB/Twitter followers
- # People indicating they want to volunteer with you

- Website traffic
- Social mentions
- Media impressions
- Polling (awareness)

Adapted from Gideon Rosenblatt's *Engagement Pyramid: Six Levels of Connecting People and Social Change*

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[Download A4 Template]

[Download A1 Template]

Engagement Pyramid Worksheet

YOUR Engagement Pyramid

Actions

What observable actions can you track at each level of engagement?

Communication

What do people need from your project/organisation to stay engaged at each level, or to move up?

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Download A4 Template

Download A0 Template

Exercise 5:

Open Campaigning

CORE FUNCTION: NO

CORE TOOL: NO

Level of difficulty:
Moderate

Time:
60 minutes

People:
Small groups

Materials:
Markers, sticky notes, hand-out or slide with elements of open campaigns

Purpose of this exercise:
Exploring how you can open your campaign project for others to participate, create, influence and lead elements of the project.

Expected outcomes:
Ideas for how you can open your campaign in different ways to increase the level of participation and ownership people have over the campaign.

Expected Campaign Canvas outcome:
Could affect content of several boxes.

How this exercise leads to the next section:
It stands on its own.

Facilitation Pointers:

There are no correct answers here. Some things in your projects may be very open, while others might be necessarily more secretive. Explore the opportunities for open campaigning and decide what works best for your and your project.

Step by Step:

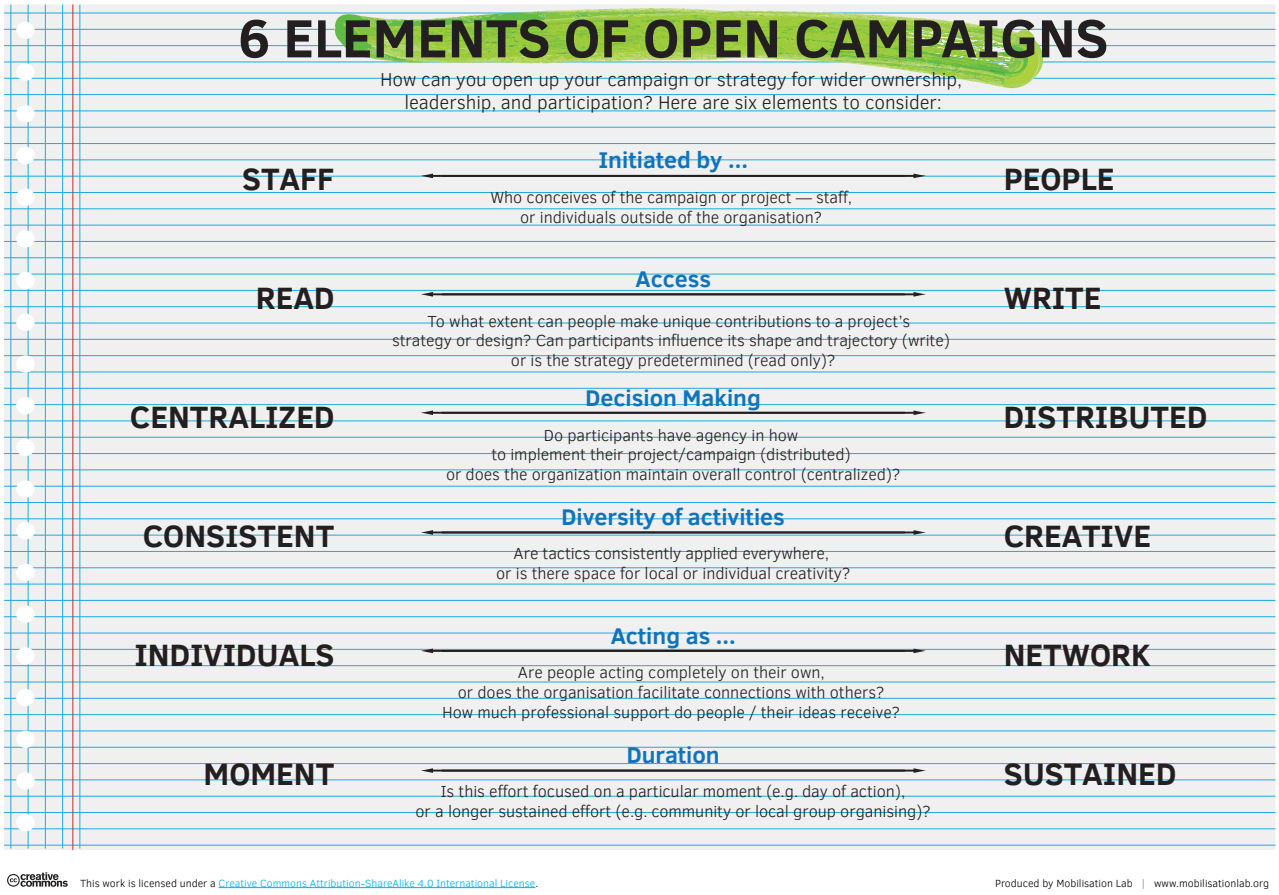
1 There are no set rules or definitions for open campaigns, but there are a number of different ways in which a campaign or organisation can be “open.” Divide the team into smaller groups and ask them to explore 1-3 elements of open campaigns, answering the questions associated with each element of open campaigns.

2 Then the group should share ideas to increase openness of the campaign, and record ideas on sticky notes.

3 Once they have explored ideas for each of their assigned areas, ask them to evaluate ideas based on what ideas will enhance the campaign, and which ones will come with internal hurdles. It can be helpful to draw these on an xy axis to get a picture of the ideas that will have the most value and will be easiest to implement. Based on this and their discussions they should be ready with recommendations to share with the full group.

4 Bring the group back together to share their recommendations and agree together what new open elements they will include in the project.

Open Campaigning Handout



NOTE: Don't worry if you find that your campaign is on many varying points along the open spectrums; this is designed to facilitate discussion, not serve as a list of must-haves.

Download A4 Template

Download A1 Template

SECTION 2:

What's Next

In this section you'll find exercises to help the team align on how to take this plan forward. What are questions that still need to be answered? What are the immediate next action points?

Exercise 1:

Research & Testing

CORE FUNCTION: YES

CORE TOOL: NO

Level of difficulty:
Easy to moderate

Time:
40-60 minutes

People:
Small groups

Materials:
Flip chart paper, markers and sticky notes

Purpose of this exercise:
Identifying uncertainties and opportunities for future learning to inform, refine and improve your plan.

Expected outcomes:
Specific research needs and testing tasks.

Expected Campaign Canvas outcome:
May provide some content for assumptions and risks, along with noting places where we need to dig further on other points.

How this exercise leads to the next section:
It provides content for the timeline along with previous exercises.

Facilitation Pointers:

You might want to create the flipcharts beforehand, so people can dive in directly.

Step by Step:

1 While the project has been defined in broad brush strokes, there are probably still a number of unknowns and ideas that need further testing. These tasks will help to refine and improve (maybe even change) the plan as new knowledge comes to light. It is useful to break the overall project into smaller parts that smaller groups can look at in more detail. Agree with the team how to break up the project to look at it in more detail and who should be in each group based on their knowledge and expertise.

2 It's helpful to prepare templates in advance on flipchart paper with sections for:

RESEARCH

- What do you need to find out? PRIORITY/NICE TO HAVE
- Who do you need to talk to or where can you find it?

TESTING

- What do you need to test? MUST DO/NICE TO DO
- How will you measure success?

3 Once small groups have finished, they should share their outcomes with the rest of the team and allow time for other team members to ask questions or build on what has been presented.

Research & testing.

Research & testing.

Exercise 2:

Building the Timeline

CORE FUNCTION: YES

CORE TOOL: NO

Level of difficulty:
Moderate

Time:
60 minutes

People:
As a group

Materials:
Flip chart paper(s) in a horizontal line with the estimated duration of the plan or project

Purpose of this exercise:

Creating an overview of the project including key activities and tasks over time and the.

Expected outcomes:

A timeline of tasks, campaign activities and key moments (internal and external).

Expected Campaign Canvas outcome:

Once you lay out the timeline, you could find some items missing from other boxes. It will also provide more information on all the tasks the team has (box 10).

How this exercise leads to the next section:

It doesn't, but will lead into roles & responsibilities.

Facilitation Pointers:

You can build a timeline as a stand alone exercise adding the outcomes from the previous exercises as described here, or you can start the day with a blank timeline and add to it at the end of each previous exercise to gradually build the timeline. If you do this be sure to allow time for the team to review what has been added, discuss how it all fits together and make changes as needed.

It's helpful to subdivide your timeline horizontally. Categories could include external events, internal events, deadline and other projects that could affect your work, further research, planning or testing needs and even sub-divide your project into its key parts.

Step by Step:

1 Start by identifying the key external moments that affect your campaign. Are there key decisions, events or deadlines that you need to take into consideration? Put each of these on a sticky note and add them to the timeline.

2 From your campaign ideas, what are the biggest moments where you want to galvanise attention and action? Agree when these need to happen and add them to the timeline.

3 Now add all the smaller activities that have been agreed that build up to, support or follow up on these big moments. This should include any further research and testing.

4 What other activities or tasks need to happen that are not directly related to these big moments? Anything else that is missing?

5 By now you should have a complete overview of the project. Ask the team to step back and have a look. Does this add up to creating the change they want to see? Where are there uncertainties that could affect the timeline? Where are there conflicts in capacity or activities? Adjust the timeline as needed and get agreement from the team that this represents what they want to move forward with.

Building the timeline.

Exercise 3:

Creating Team Culture

CORE FUNCTION: YES

CORE TOOL: NO

Level of difficulty:
Moderate

Time:
1 hour

People:
Individually, in pairs and as a group

Materials:
Sharpies/pens, sticky notes

Purpose of this exercise:
Consciously creating a team culture based on shared purpose and values.

Expected outcomes:
Articulating your shared purpose as a team, and the values and behaviours that will support your work together.

Expected Campaign Canvas outcome:
None.

How this exercise leads to the next section:
It's useful to have the conversation about culture and values before going into the details of roles & responsibilities.

Facilitation Pointers:

You'll know best what process and terms will resonate with your team; feel free not to use the template, but do be sure to address these issues.

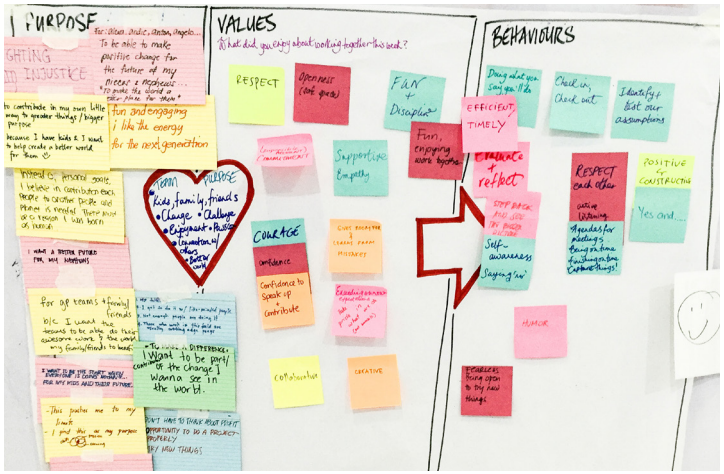
Step by Step:

1 Either individually, or in pairs, start by answering the question “why do you do this work?” Participants should write on a card or medium sticky note, their personal reasons for why they do this work.

2 Bring all the personal responses together on the wall and read each other’s. Ask the group what common reasons/themes they see, discuss. From these is it possible to synthesise into a couple statements that captures the team’s shared purpose. Write these down.

3 Return to working in pairs or groups of threes, discuss what values are important to them in how they work as a team. Write each value on a sticky note. This could also describe ways of working during the accelerator they would like to take forward. Bring all ideas together and cluster similar values. Discuss whether there is agreement on all values. Are some more important than others?

4 Finally, as a group, discuss what behaviours can they take individually and as a team to support these values. Capture agreed behaviours on sticky notes. Be sure to prompt on issues of communication, decision making, changes to the plan and evaluations. Are there any ways of working they have experienced during the campaign accelerator process they would like to continue, adapt or change?



Creating team culture.

Creating Team Culture Worksheet

Our Team Culture

Team members:

My Purpose
Why do you do this work?
What motivates you personally?

Our Values
What is most important for us for a good team environment?

Behaviours
What behaviours do we need to take individually and as a team to support and live our values?

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NOTE: During the Accelerator you may have introduced some new ways of working to the team. This is a good time for the team to reflect on what ways of working and behaviours from the campaign accelerator they would like to take forward to support their team work in the future.

Download A4 Template

Download A0 Template

Exercise 4:

Roles & Responsibilities

CORE FUNCTION: YES

CORE TOOL: NO

Level of difficulty:
Depends on the team

Time:
40-60 minutes

People:
As a team

Materials:
Additional sticky notes and markers

Purpose of this exercise:

Agreeing who in the team will be responsible for the activities and tasks on the timeline.

Expected outcomes:

Each activity or task on the timeline has name(s) attached to it to identify who is leading and who else is contributing.

Expected Campaign Canvas outcome:

Might provide more content for box 10 (What do we need to do?).

How this exercise leads to the next section:

Should be the final pieces for next steps.

Step by Step:

1 It's easiest to start with the biggest elements on the timeline. Who is leading on these activities? Some of these will be too big for one person. Who else in the team is helping? Who are the decision makers?

2 At this point it is easiest to let all of the team go through the other items and put their names against activities or tasks.

3 Once they are done, have a look through and see if anything has been missed and ask who is going to cover it?

4 This is a good time to to see how everyone is feeling about their workload, is there anyone feeling like their workload is unmanageable? Are there skills missing in the team to deliver elements of this plan? It is up to the whole team to find solutions rather than put it on individual people to manage — make sure these issues are raised and solutions or next steps to resolving these are also recorded on the timeline.

Roles & responsibilities.

SECTION 3:

Wrapup

In this section you'll finish your Campaign Canvas and evaluate the workshop.

Exercise 1:

Campaign Canvas

CORE FUNCTION: YES
CORE TOOL: YES

Level of difficulty:
Easy

Time:
30-40 minutes

People:
Project team

Materials:
Draw or print the campaign canvas and use sticky notes so you can make changes as your plan is refined.

Purpose of this exercise:

Summarising all of the decisions you have made together and creating a quick outline of your project plan that can be used as the basis to create your final proposal and as an ongoing tool to track, respond and adapt to changes that affect your strategy or plan.

Expected outcomes:

An updated campaign canvas and identified gaps in the overview, action points for these should be recorded on the timeline or else where.

Expected Campaign Canvas outcome:

At this point, you should have content to review in all boxes.

How this exercise leads to the next section:

N/A.

Facilitation Pointers:

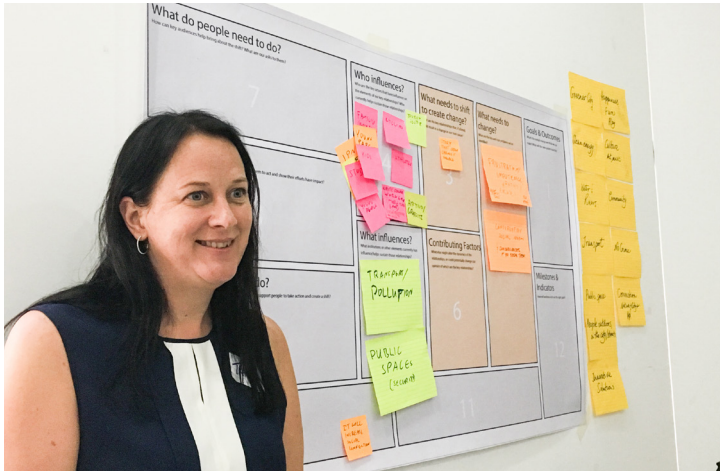
This is a final opportunity before you go back to your day to day work to review and confirm what has been agreed by the team.

You should also take the time to agree immediate next steps with the team including who will write up the plan and other materials produced during the workshop.

Step by Step:

1 Follow the numbered sections of the canvas adding what you know on post-it notes as you build your plan and update it as you learn more about the problem, the context and the groups you want to engage.

NOTE: This is a final opportunity before you go back to your day to day work to review and confirm what has been agreed by the team .



Starting to fill in the campaign canvas.

"Completed" campaign canvas.

Campaign Canvas

NOTE: Large templates to print the Campaign Canvas for your workshop can be found at the bottom of the page as well as at the end of the guide. You can also keep it and post it in your office so everyone can see it and update it as the plan changes. The orange boxes are the ones to keep an eye on and update as the external context changes, leading to needed shifts in what you've put in the grey boxes.

Download A4 Template

Download A0 Template

Exercise 2:

Workshop Evaluation

CORE FUNCTION: YES
CORE TOOL: NO

Level of difficulty:
Easy

Time:
40-60 minutes

People:
All participants

Materials:
Large sticky notes in two different colours — pre-draw happy faces and sad faces on the different colours.

Purpose of this exercise:
Bringing closure to the workshop for all participants and understanding what worked and what can be improved.

Expected outcomes:
A quick visual hotspot map of what worked and what needs improvement — and supporting details about why it did/did not work for participants.

Expected Campaign Canvas outcome:
None.

How this exercise leads to the next section:
None.

Step by Step:

1 This requires a bit of planning and prep to set up. Keep and post everything that you have produced in the workshop in the order that the participants did them. This should create a visual map in order of the entire campaign accelerator with templates, flip charts, worksheets, prototypes, and anything else you created, so participants can see the journey they went on during the workshop.

2 It's helpful to walk through the journey on the walls reminding everyone what they did during the workshop, it's been a long journey and gives people the time to think about it.

3 Hand out 3 happy face large sticky notes and 1 sad face sticky note (you can adapt as you wish). Ask people to post the large sticky notes around the room corresponding to the points in the accelerator that they enjoyed or found the most useful and those that were frustrating, challenging or not so useful. They should include on the sticky note some details about why they are posting a happy or sad face on that part. These are all anonymous.

4 Once everyone has finished posting their sticky notes, review the hotspots and debrief with the team on why some parts were popular and others not. Ask as many questions as you need to to understand why something is working for participants or how it can be improved. Make sure your co-facilitator or a volunteer takes detailed notes so you can revisit the feedback for future workshops.

Workshop evaluation.

Workshop evaluation.

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Pg 235 Creating a Call to Action Worksheet

Download A4 Template

Download A1 Template

Pg 238 Detailed Engagement Pyramid

Download A4 Template

Download A1 Template

Pg 239 Engagement Pyramid Worksheet

Download A4 Template

Download A0 Template

Pg 242 Open Campaigning Handout

Download A4 Template

Download A1 Template

Pg 250 Creating Team Culture Worksheet

Download A4 Template

Download A0 Template

Pg 256 Campaign Canvas

Download A4 Template

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The Mobilisation Lab exists to transform how campaigns are fought and won, providing a forward-looking space to envision, test, and roll out creative new means of inspiring larger networks of leaders and people around the world to create positive change.

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