



## Worksheet: Organizing Planning Form

### KEY STEPS IN AN ORGANIZING PLAN

- **Define the Issue.** Explain it simply and clearly. If it's a patient care issue, define it that way. (What makes this a good issue to organize around?)
- **Formulate Demands and Define Victory.** What will fix the problem? State it clearly and simply. If you win, how will the terms of the agreement be enforced?
- **Identify Your Target:** Who can meet your demands?
- **Decide on Tactics:** What will you do to influence your target? How will you kick off your campaign? A strategy is a collection of actions that escalate from easy, low-pressure tactics to more intense confrontation. How will you escalate when your target says no or tries to stall? How many people will you mobilize for each tactic?
- **How will you put your plan into action?** What are your first steps in the next 2 weeks?

### OTHER IMPORTANT CONSIDERATIONS

- **Messaging:** What are the strongest arguments in favor of your demand? What are the main arguments against your demands and how will you counter them? What is your slogan? What symbols or images do you want to use?
- **Identify leaders.** Who is impacted? Among those who are impacted, who are the opinion-leaders who can move others to act?
- **Set Goals to Build Your Organization.** What do you want to accomplish in terms of increasing membership involvement as part of this campaign?
- **How is your target vulnerable?** And, are there indirect targets that can influence your direct target?

- **What are your strengths and advantages?** How will you use them? (Could include federal or state law, public support, high-profile media coverage already, etc.)
- **What will be your challenges or obstacles?** How will you deal with or neutralize those obstacles?
- **Who are your potential allies?** An ally is an individual or group that is not directly impacted but that will actively support your campaign.
- **Research:** what questions do you wish you knew the answers to? What facts (documentation) or horror stories do you want to gather?
- **How will you involve, communicate with, and mobilize the people impacted by the problem?** What methods will you use: phone trees, meetings, one-on-one conversations, fliers? When? Who will talk to whom?
- **Evaluate and Course-Correct Frequently:** How and when will you check in on your progress? Are the actions going well? Did you involve the people you wanted to recruit? Did you achieve your goals? What are the next steps? How will you publicize your victory?