

GRASSROOTS POLICY PROJECT

Strategic Planning and Strategy Development

Introduction

Conservatives have focused on building power, not only on specific victories; they developed a deeply-interconnected infrastructure, with its disparate parts and unlikely allies held together by long-term strategic goals—in particular, governing power—and a conservative ideology, along with more immediate incentives and rewards for many of the conservatives' constituencies. In comparison there is no similarly cohesive, progressive movement in this country with a shared agenda, strategic goals, and a shared ideology. Instead we have fragments. Some of them are relatively strong, others weak, and the whole is less than the sum of its parts.

If there is one lesson for progressives in the 35-year rise of corporate and conservative power, it is this: none of our movements can win its major goals if we remain fragmented, independent of or disinterested in other progressive sectors.

Fragmentation refers to groups working in relative isolation, or with a single-issue approach, or with a go-it-alone, turf mentality. It also refers to the way we tend to work in issue 'silos,' in which each issue or election is seen as an end-in-itself, with no real connections across and between issues; no sense of a broader agenda that could supplant the corporate-conservative agenda that dominates state and national politics.

We see signs that this analysis resonates with many people — witness the national attempts to have organizations work together that would not have been conceivable just a few years ago. And witness the many state, regional and national conversations building movement infrastructure. There are signs of qualitatively different work — a shift, we could say, toward power-building strategies.

Our Strategic Framework for Movement-Building

The word *movement* is used a lot these days. To be as rigorous as possible, we are using the term in a specific

way that focuses more on the practices and processes that enable social justice organizations to advance transformational goals. Our use of the term 'social movement' emphasizes the need for a cohesive political infrastructure and worldview. We draw upon a classic sociological definition from Gerlach and Hine, in *People, Power, Change: Movements of Social Transformation*:

1. A movement has many parts, elements, constituencies and organizations. Its units are held together by many different stands or types of connective tissue: personal, structural, and ideological.
2. A movement has a mass base that understands and is committed to the movement's goals. The base is developed in part by face-to-face recruitment by committed individuals using their own pre-existing, significant social relationships.
3. Individuals in the movement have a personal commitment that identifies them with a new set of values, and commits them to changed patterns of behavior.
4. The movement has a worldview or ideology that codifies values and goals, provides a conceptual framework by which all experiences or events relative to these goals may be interpreted, motivates and provides a rationale for envisioned changes, defines the opposition, and forms the basis for conceptual unification of a diverse network of groups.
5. The movement has a set of strategic goals that go beyond the immediate goals of any constituent part and that provide strategic direction to its activities and worldview.

Using this definition, we can distinguish a loose collection of organizations (fragments) from a more cohesive and coordinated social movement. This definition places emphasis on how the different pieces are held together: multiple ties at various levels, and in particular, ideological connections that tie groups to a shared worldview. People in movements, in the way we are using the term, feel that they share some common way of seeing and being in the

world, whatever the many other differences in their lives. Part of our task as organizers and leaders is to provide people with spaces and opportunities to share their visions, hopes and aspirations in ways that move them and us towards a shared worldview.

The term *political infrastructure* also is used frequently today. Civic institutions representing corporate-conservative interests include business associations, conservative think tanks, corporate-dominated media, and many others. They work to get some issues on the political agenda, such as privatization, and keep others off, for such as labor law reform.

This notion of using political infrastructure to get an issue on the political agenda, or to keep it off the agenda, was first developed by E.E. Schattschneider, in 1960, in his classic book, *The Semi-Sovereign People*, and it has been developed extensively by political scientists since then. The underlying idea is that collections of institutions can work together, often behind the scenes and over long periods of time, to alter what is on the political agenda. For example, conservative institutions have worked together for decades to put privatization of government on the agenda; that common effort set the context for making privatization of Social Security part of the current political debate. This corresponds with what we call the second face of power: building political infrastructure to control the political agenda.

By putting resources into work in the 2nd and 3rd faces of power, conservatives have been able to connect with and attract millions of working people. Given how important power is for achieving our long-term goals, we need to be as clear as possible about what we mean by power, hopefully in a way that provides operational guidelines for organizers, activists, and organizations. GPP uses the “three faces of power” as a way of getting at this. Here is a brief review:

- | **First Face:** direct political involvement, which refers to the work that organizers and activists do in the most visible political arenas: legislatures, courts, elections, public agencies, etc. The first face of power is what is often taken to be the whole story. But, to understand what is going on in first-face arenas, we need to dig deeper, into the less visible expressions of power.
- | **Second Face:** organizational infrastructure; referring to the networks and coalitions that are able to move issues onto the political agenda.
- | **Third Face:** ideology and worldview; concerning the ways in which groups struggle to shape peoples’ understandings about the political and social world and

what they believe is politically possible.

We encourage groups to shift some resources towards the second and third faces so that, over time, they may shift the context of the first face fights. We encourage the development of progressive infrastructure by fostering more coordinated work within states that links local organizing to state-wide efforts, and that links states to national progressive politics. We also provide tools and spaces for groups to engage in the struggle over worldview and values. For example, revenue and budget campaigns provide opportunities to expand the debate about the role of government as well as markets in fostering conditions for shared economic prosperity.

Worldview: the Third Face

We define worldview as the variety of beliefs, both formal and informal, that individuals and groups draw upon and inherit from the larger social world in which they live. While many different ideas and belief systems in our society compete for attention, some are more dominant than others. With most of our issues, we see elements of a ‘dominant worldview’ at work, one that draws upon themes, assumptions and ideologies that are part of the mainstream American cultural heritage. Political and social issues or problems are defined and interpreted for people within the larger world of meanings —the images, assumptions, stereotypes and beliefs that make up the dominant worldview. Different conservative and corporate interests can be brought together using overarching frames, built around themes and values about individualism, market competition and a limited role for government. This shared worldview helps hold together a corporate-conservative infrastructure.

The notion of worldview has been gaining currency among progressives, in part because of the recognition that conservatives have consciously and consistently worked on this terrain for decades, and that this effort on their part has been crucial to their electoral and legislative success. However, progressives generally have reacted by worrying about values and framing. While we applaud this as a step forward, values and frames are not necessarily linked to a strategy for the long-term goals we are concerned with. When we use the term worldview, we emphasize a more coherent effort on the terrain of beliefs and discourse linked to building power to achieve long-term goals. For example, if *democracy* is used as a value pure and simple, but not as part of a larger discourse about the ways in which corporate power distorts and undermines democracy, then its use doesn’t contribute to the strategy, it doesn’t help challenge the corporate-conservative

worldview.

Progressives have deeply-held values and ideas: authentic democracy, a sense that we are all connected, that injustice anywhere leads to injustice everywhere, that we must struggle together to make racial justice a reality, that all people deserve dignity and respect, and that economic justice is vital for democratic participation. To make these ideas real, we need a movement that embodies our shared vision and worldview. The real test for progressives is figuring out how, where and when to introduce bigger themes and challenges to the status quo. Conservatives started their attack on big government decades ago, but they didn't start by suggesting the privatization of Social Security.

The Challenges We Address Through Strategy Development

Strategy is about goals and the choices we make in order to achieve our goals. Progressive groups usually have broadly defined goals that are related to fighting inequality, promoting social and economic justice, and enabling all sectors of society to participate fully in political and social life. While the directions we would like to move toward are clear — in terms of justice, equality and a more robust civil society — we argue that progressives have made the best choices about how to get there.

GPP's focus on strategy development is designed to advance groups' work so that they can be more effective in the current fights — many of which are defensive battles to preserve important programs — while also laying the groundwork for winning pro-active policies that put economic security back onto the political agenda. We work with groups to help them shift toward adopting a *movement-building strategy*.

The challenges we highlight here are the ones that we see as most crucial in terms of moving from tactics and short-term work, to strategy.

Fragmentation. Most groups engage in short-term, single-issue policy work, or the analogue of single-issue work in other arenas, such as organizing, electoral work, etc. Even multi-issue groups tend to work on each issue in isolation. Paradoxically, in order to win our current goals — whether it is to curtail foreclosures or pass the Dream Act — we need bigger goals. Short-term goals, in the absence of more long-term, transformational goals, keep us on the defensive. To be more pro-active, we have to operate on two tracks at once: using the short-term to advance the long-term.

Short-term incentives. Groups are subject to multiple incentives that encourage an issue-specific, short-

term focus in their work. For example, much grant-making, as well as publicity and media attention recognizes and rewards short-term issues with clear pay-offs. The push by many organizers for pragmatism — to do what works, and avoid abstractions — means that long-term thinking and reflection are often considered a luxury that organizers can't afford. A more strategic perspective argues that short-term issues and campaigns are not ends in themselves, but opportunities to advance a broader, more pro-active agenda.

Fear of ideological struggle. This goes back to red-baiting and anti-communism, which have been effective tools for many decades in holding back social change movements. Recently, red-baiting has resurfaced as a tactic for discrediting progressive policies, like healthcare reform, foreclosure prevention, Wall Street re-regulation and stimulus programs to boost the economy. Because progressives have been ill-prepared for the battle of ideas, we were not able to dominate the narrative surrounding the financial crisis, bailouts and ongoing recession.

Weak ties to a grassroots base. U.S. groups have developed approaches to organizing that focus on mobilizing broad support for an issue, often at the expense of building deep support among a core member base. For example, groups will tap into their member bases around specific, and usually narrow, interests, as they pursue a campaign goal. If this is the extent of their contact with their members, they are not developing deeper connections to and support for the overall mission and long-term goals.

Tensions around addressing racial justice.

Lack of movement infrastructure. To build progressive power, we need better integrated, coordinated and strategically oriented networks of different kinds of social change groups, representing diverse constituencies and issues that can impact state, regional and national politics. We need collaborative relationships between groups that can play different and complementary roles, in multiple arenas: electoral, legislative, cultural, at the community level as well as state, regional and national. (Note that the word *infrastructure* is often used as a synonym for organizational capacity; GPP uses the term in a very different way.)

Elements of GPP's Program

The idea of strategic development is based on our framework for understanding power. We use the three faces of power as a way to help groups identify strategic shifts and develop benchmarks for staying on track with the shifts. We work key staff and leaders in community-based and statewide groups to develop and tailor a pro-

cess that can address their core challenges.

Strategic Shifts. For example, our strategy development work with a statewide coalition in the Northeast helped them identify five major strategic directions for their work, along with shifts they need to make in order to move in these new directions. The five shifts are:

- 1) **From** a board-level coalition **toward** deeper relationships with the rank and file of their member groups;
- 2) **From** isolated issue campaigns **toward** defining and promoting a progressive agenda;
- 3) **From** short term messaging **toward** shaping and promoting a progressive worldview;
- 4) **From** staff-driven work **toward** an organizational culture that nurtures and sustains new leaders that represent diverse communities and voices;
- 5) **From** cyclical electoral work **toward** year-round electoral engagement.

Taken together, we believe that these shifts represent a significant advance towards building power, not just working on immediate issues. Each of these shifts can be planned, operationalized, and measured. None of them, however, are easy to navigate.

Take the first one: most coalitions tend to be top-down, with boards composed of organizational representatives whose primary interest is their own organization. The shift here is that the organizations start to understand the bigger and the long-term goals of the coalition, so that they can convince their own organization to have their own rank and file work with the rank and file of other coalition organizations in local base-building efforts. This kind of base-building makes great sense, yet it is almost unheard of — unions, for example, are usually reluctant to open their membership to outside groups, much less have their rank and file members work on a regular basis with others.

Toward a progressive agenda. The second shift is about moving away from issue silos. Every issue campaign that an organization is working on can be put in the context of a movement-building, power-building strategy. Most organizations we are familiar with work on issue campaigns that focus on a specific aspect of a set of problems: a particular housing campaign or budget battle. Yet most people care about and are touched by a wide range of concerns and problems that are interconnected: about jobs and housing, health care and education, safety and security, which includes economic security, and about hope for the future. The single-issue approach does not lend itself to deep analysis of the systemic nature of the problems, nor does it speak to a larger vision for a transformed society.

Party platforms might once have played this kind of role, but, with the possible exception of planks put forward by the Tea Party, platforms no longer have much meaning.

Sometimes, efforts to develop progressive agendas for our alliances and networks end up looking like laundry-lists of issues. We can generate a lengthy list of things that our allies and friends are working on, or have thought about working on. We are not so good at processing those lists through shared strategic analysis, making linkages and looking for strategic openings, enlisting support for issues that are not of immediate concern to all of our allies. Instead, we tend to bring allies together into coalitions of convenience to pursue this or that issue.

A list of issues does not become a platform or agenda on its own. The agenda must embody the deeper beliefs, values and themes that we refer to as a progressive worldview. This does not mean that every group is in perfect agreement about either the agenda or the underlying worldview. We can share broad beliefs and still disagree on specific policy as well as strategy. Anchoring agenda-setting in worldview makes it possible for us to explore the tensions, the political and organizational imperatives, that make it harder for some groups to be 'out front' on some issues. It helps us figure out when and how to work together on issues that certain constituencies do not embrace.

Year-round electoral work. Voter engagement work is often treated in a compartmentalized fashion, including being carried out in the last months of the electoral cycle. In many situations and for many organizations, that approach may make sense. GPP promotes a complementary approach: the kind of strategic shifts we described above provides opportunities for civic engagement to be integrated into the overall work of an organization. Correspondingly, voter engagement should be treated as a year-round activity. In a way, we can summarize our approach to this area by this phrase — **integrated, year-round voter engagement.** We emphasize the relationship between three ingredients: developing and using progressive worldview, working on a progressive agenda, and connecting with progressive infrastructure.

- I Worldview. Too often, an organization's campaigns and programs are disjoint and disconnected from their electoral engagement work. Consistent use of worldview as part of conceptualizing and framing the work can promote the integration and joint development of all an organization's campaigns and programs with voter engagement.
- I Progressive Agenda. GPP emphasizes shifting from

working on isolated issues to a progressive agenda, so that every issue or problem that an organization works on is consistently developed for their constituencies in terms of a progressive agenda or platform. This consistency is at the heart of “getting beyond issue silos,” and it is another way to promote the integration and development of an organization’s programs with civic engagement.

- I Infrastructure. Being part of an effort to create a progressive political infrastructure is a third way for organizations to integrate real civic engagement into all of their work.

Building Infrastructure Through Strategy Development

GPP’s work with local and state groups and national networks is focused on their roles as bridging institutions that can provide connective tissue in a progressive infrastructure. For national networks the term *infrastructure* covers two dimensions of organizational development: the traditional arena of internal capacity building and short-term coalitional work, and the less familiar dimension of fostering movement infrastructure — stretching groups to build deeper, more organic connections between groups that should share a common long-term mission but otherwise operate in different locales, e.g. state-level advocacy groups, local community groups, progressive think-tanks at the state and national level, sectoral organizations (labor, environment, women’s movement) and more.

Racial justice and infrastructure. The deep fissures of race continue to undermine efforts to build a broad multi-racial movement in this country. And yet, we cannot build progressive governing power without a multi-racial movement. As we look back over the history of struggles for progressive policies and for activist, democratic government, we can see great moments when multi-racial efforts brought about significant reforms. We also see how these and other efforts sometimes fall short, either because their opponents successfully used race to divide constituencies, or because white progressives did not recognize the need to join economic justice with racial justice. This combination is essential for building progressive power today.

Without leadership from people of color, our movements will not be able to overcome our many divisions and fractures. This is true even (and perhaps, especially) for movements and organizations that are led by white progressives who don’t seem to grasp the centrality of race in our society; who think they can come up with a broad,

progressive agenda without including leaders of color and without dealing squarely with racism. No agenda or platform, no network or infrastructure will succeed without analysis and leadership that reflects the concerns and constituencies that make up ‘people of color’ in this nation. And no analysis or set of beliefs will succeed in guiding a movement unless it addresses racism. We encourage people of color to think together about the progressive movement and, from a position of unity and power, challenge and engage with white progressives, to broaden and expand an understanding of what we all should be for, as progressives in the U.S. today.

Grassroots Policy Project