



## Developing A Field Plan: A Worksheet

### Who should use this worksheet?

This worksheet is designed to help NARFE federation leadership develop workable field plans, but the questions below can be adapted for use at the chapter level where necessary. You should base your answers on past experience, your relationships with NARFE members and the current political climate of your state.

### Goals

Are there policies within the budget process that NARFE members or the NARFE community must react to?

What are possible short- or long-term solutions at hand for this problem? (Examples: Is this something that could be fixed in a short-term budgetary appropriations bill or continuing resolution? Or is this a long-term shift in policy like a postal reform bill?)

What will be the primary “ask” that NARFE makes? (Examples: Vote against the Chained CPI, end the pay freeze, etc.)

Are there any internal federation advocacy needs that might be helped through this campaign? (Examples: better relationships with a member of Congress, increased familiarity with legislative advocacy, recruiting/engaging NARFE membership)

### Targets

*Note: The target for your campaign is often a member of your congressional delegation or a candidate for office.*

Who has the ability to give you what you want? Who is the person with power in this matter and what is their relationship with you or your chapter right now?

Do you know where your target stands on this issue? If not, can you make an educated guess based on past statements and votes? (Check in with Headquarters if necessary.)

List your targets. Take into account your NARFE chapters’ existing relationships with the target and your state’s politics. If there is more than one target, please rank them in priority, with a short explanation.



## Tactics

*Note: After reading the longer descriptions of each tactic, please mark the tactics you feel are most likely to succeed with your resources. Also include any additional tactics you have used that seem effective. Please note that if you have more than one target, you will need to fill this chart out for each of them – not all tactics will work as well with every target.*

Tactic	Will this tactic be used for this campaign?	Who is able to take the lead on this tactical effort?	Benchmark/Goals (specify if this is for the federation or an individual chapter)	Actual/Results (update as the campaign continues)
Letters submitted				
Meetings held				
Chapter meetings hosting a target or his/her staff				
Call-in opportunities organized				
Calls made to office(s)				
Share Your Stories questionnaires submitted				
LTEs or op-eds submitted				
NARFE members identified as potential media liaisons				
Coalition allies or supporting organizations identified				
Federation or chapter newsletter articles highlighting legislative updates or activity				

## Capacity Planning

Which NARFE chapters are currently active and would be willing participants in this campaign? Please list chapters and contact information.

Which NARFE chapters will need additional support in order to participate? Please list chapters and contact information.



Of the NARFE chapters identified as ready to participate in the campaign, when are they scheduled to meet between now and the campaign's end date?

Are there additional opportunities for NARFE members to assemble (example: chapter or federation meetings, community events, etc.)?

Specifically, with regard to encouraging NARFE members to participate in grassroots advocacy in the past, what worked and what didn't?

## **Timeline**

Is there a built-in end date for this campaign? By what date do you need to achieve success? (Examples: a known congressional vote or election)

Do the targets have any public meetings or events on the calendar? If so, please list the dates and locations.

Are there any federation or chapter events that could serve as organizing opportunities?

To draft your campaign timeline, review your list of tactics and benchmarks. Ask yourself:

- How much preparation and planning time do you need to orchestrate each of them?
- Which will you be able to do concurrently and which will require more resources or focus to complete successfully?
- Use the space below to **work backward** from your intended end-date, and map out when each tactic will start and finish. Include any already-known events in your timeline and build tactics around them if it makes sense to do so.



## Field Plan Timeline

**Campaign Start Date:**

Tactic:

Lead Person:

Start Date:

End Date:

Notes/Important Interim Dates:

Tactic:

Lead Person:

Start Date:

End Date:

Notes/Important Interim Dates:

Tactic:

Lead Person:

Start Date:

End Date:

Notes/Important Interim Dates:

Tactic:

Lead Person:

Start Date:

End Date:

Notes/Important Interim Dates:

Tactic:

Lead Person:

Start Date:

End Date:

Notes/Important Interim Dates:

**Campaign End Date:**