



What Is a Field Plan?

Field plans are blueprints – they help us to **set goals, select targets**, and lay out a series of **tactics** to be used to achieve those goals within a given timeframe. Field plans should be designed by a federation or chapter, taking into careful consideration their **internal capacity** for running campaigns. Field plans should be guided by a realistic **timeline** that leads the campaign to completion. Field plans also allow federations and chapters to think and plan strategically so that congressional outreach is purposeful and timely.

A campaign can be geared to a specific issue or a specific time period. For example, if a chapter wants to take full advantage of August's Grassroots Advocacy Month, the chapter leadership might write a field plan to prepare for August's activities. Similarly, if a provision is in the budget and a federation wants to focus its efforts on encouraging its senators to remove the provision, the members might write a field plan opposing the provision.

Field plans are relevant no matter how big or small the issue of focus. The National Active and Retired Federal Employees Association (NARFE) and the Protect America's Heartbeat campaign sometimes engage in larger scale, nationwide grassroots campaigns to protect the earned benefits of federal workers and retirees. However, chapter and federation leadership should set goals and benefit from field plans as well.

This document reviews the basic aspects of a field plan, and the attached worksheet will guide you through creating your own field plan and help you think through the most important aspects of your campaign.

Goals

All grassroots efforts should have clear goals. These should include both external and internal goals.

For example, an external goal may be to affect the outcome of a bill or change a member of Congress' vote or position on an issue. Complementary internal goals might then include: identifying, recruiting and engaging NARFE members; building alliances with other activists in the community; securing press or media coverage for a NARFE chapter or federation; or building the chapter's capacity for advocacy in the long term.

By setting internal goals alongside your external ones, your field plan will clearly outline what your chapter or federation stands to gain from having gone through this process even if your external goals (which typically are much harder to control) are not achieved.



Targets

For chapter or federation leadership, your targets are usually clear – often, they are members of the congressional delegation in your area or candidates for office. There may be times when NARFE HQ actively reaches out to leadership, having identified particular states or districts as critical to overall legislative goals. However, you should plan campaigns of your own volition in response to local needs or concerns. In either case, once possible targets are identified, NARFE members apply pressure on that target through various grassroots tactics.

Tactics

There are several common tactics that NARFE’s grassroots activists have taken advantage of in the past:

Handwritten Letters

NARFE Headquarters, federations or chapters draft letters for NARFE members to use as templates or sign, and then forward to targets.

Meetings With Members of Congress and District Directors

NARFE members meet with representatives, senators or district/state directors in their congressional delegation.

Engagement and Involvement With Local Chapter Meetings

NARFE members host representatives, senators or district/state directors in the congressional delegation at chapter meetings.

Personal Stories

NARFE members who can share their stories and experiences from working in the government are connected with the media, used as spokespeople at events or introduced to targets.

Letters to the Editor (LTEs) and Op-Eds

NARFE members submit original or NARFE-drafted letters to the editor and op-eds.

Engage Coalitions and Build Relationships

By reaching out to coalition partners in the local area, NARFE can often leverage further support at events and meetings by showing a breadth and depth of support for the issue on which they are engaged. Examples of possible coalition partners include local unions, AARP and military organizations.



Include a Call to Action in Chapter and Federation Newsletters

Organize Call-In Opportunities

NARFE Headquarters, chapters or federations work to organize call-in days or weeks, generating NARFE member calls to targets expressing their support, or opposition to, the topic at hand.

Guides on how to effectively organize all of these tactics can be found throughout the toolkits.

You will not use every tactic in every campaign, and you will want to set reasonable benchmarks for success with each tactic. Benchmarks (i.e., numbers of calls, quantity of letters, number of events hosted/attended) should be aggressive but realistic. If the campaign is federation-wide, campaign benchmarks also should be broken down to the chapter level, which should be tracked and monitored alongside the overall campaign progress.

The Field Plan Worksheet will help you to isolate tactics, assign one person at your federation (or chapter) level who is responsible for seeing the tactic through to fruition, set benchmarks and work toward achieving them.

Capacity Planning

All good campaigns are grounded in the reality of the group or individuals running the program. Not all campaigns will have access to the same types of human resources, and it's important to account for these factors in your planning. Federations may have different sizes, strengths and numbers of chapters, and chapters may be more or less advanced in advocacy techniques than their counterparts. All of these aspects should inform your field plan and goals.

This section of the worksheet will help you assess the internal capacity at your disposal for the campaign and ensure that you are setting realistic goals and benchmarks along the way.

Timeline

Timing is one of the most critical aspects of organizing. Particularly since we often have both short term and long term goals, mapping out a timeline of when specific tactics and activities will take place can help your campaign build momentum, guide you to successful completion of your goals and prevent last-minute rushes of activity or stress.



The worksheet walks you through the basics of taking action, and how to develop a field plan with a realistic and achievable timeline. The three most important things to take into account when starting to map out a campaign's timeline are:

1. **Timelines should be built by working backward.** You always want to start with your goal completion date and work backward from there to make sure your timeline is realistic.
2. **Pad in extra time to account for unforeseen delays or circumstances.** Clear interim deadlines for measuring progress are important to keep a campaign moving forward. However, all campaigns should design deadlines with some extra time built in whenever possible. This helps avoid situations in which one small delay or unforeseen circumstance has a ripple effect on your timeline or ability to achieve the goals you've set out.
3. **Timelines should be flexible, and good campaigns are responsive in real time.** Timelines are guides that help to ensure achievement of goals, but it is important to remember that in all kinds of field organizing, unexpected events will occur. For example, if your target comes out with a new position on an issue or announces that they will be speaking at an event in their district, you will want to reassess and change your timeline to speed up certain tactics that can take advantage of the change or shifting political landscape. Good campaigns react to events and respond to changing political realities in real time.

Working with NARFE

Working collaboratively with all levels of NARFE will help make your field plan a success.

Before you dive in to the Field Plan Worksheet, make sure you're in the know on NARFE's legislative threats and opportunities. Check out [Issue Briefs and Fact Sheets Toolkit](#) for a full rundown on what active and retired federal employees are facing.

If you need help thinking through reasonable goals for your campaign or understanding how your district/chapter/congressional delegation fits into the bigger picture of legislative priorities, contact the NARFE Legislative team at Headquarters at leg@narfe.org.

As your campaign gets off the ground, make sure to schedule check-ins with Sarah Weissmann (sweissmann@narfe.org) in the Legislative Department for advice and assistance with tracking your progress.

Throughout the campaign, tell NARFE Headquarters about your meetings and events by emailing advocacyinaction@narfe.org.