

Level 3

STRATEGY LAB

MASTER THE COMPLETE ADVOCACY TOOLKIT

Great plans don't happen by accident. They are designed, one strategic decision at a time.

THIS LEVEL IS FOR YOU IF...



- ✓ You want to connect research, strategy and learning into one.
- ✓ You are ready to think like a strategist.
- ✓ You're designing campaigns with long-term impact in mind.

WHAT YOU'LL ACHIEVE

- Diagnose and face complex political challenges
- Connect people, power, evidence and strategy.
- Design complete plans with greater impact.
- Constantly improve your work

03

1

UNDERSTAND CONTEXT

- PESTLE ANALYSIS
- PROBLEM TREE
- FISHBONE DIAGRAM
- HART'S LADDER
- 5 WHYS
- RISK ANALYSIS

2

UNDERSTAND YOURSELF

- SWOT ANALYSIS
- CAME ANALYSIS
- STAKEHOLDER MAPPING
- POWER MAP
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- NETWORK MAPPING

3

DESIGN YOUR STRATEGY

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- THEORY OF CHANGE
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- ADVOCACY STRATEGY CANVAS
- CAMPAIGN TIMELINE

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- MOBILIZATION FUNNEL
- DIGITAL CAMPAIGN PLANNING

5

LEARN AND ADAPT

- HEALTH DASHBOARD
- OUTCOME HARVESTING
- SIGNIFICANT CHANGE
- LEARNING LOOPS
- AFTER ACTION REVIEW
- WELLBEING ASSESSMENT

TIPS FOR THIS PATH



Think in systems
Don't solve symptoms. Find the leverage points to create lasting change



Challenge Assumptions
Test your ideas before reality tests them for you



Let evidence lead
Strong opinions are useful. Strong evidence is better



Stay Adaptable
The best strategy isn't the perfect plan... It's the one that evolves.

NOT SURE?
ASK CIVIS



SCAN AND CLARIFY YOUR DOUBTS



You can always go back and explore Levels 1 and 2 in case you want a quicker solution!

Plan well.
Act together.
Create change.



1.

UNDERSTAND THE CONTEXT

Before we act, we understand.

Great strategies start with a clear understanding of the world around us.

This section helps you explore the broader environment, identify the real problems, and uncover the root causes.

**The better we understand the context,
the better we can create change.**



TOOLS IN THIS SECTION



PESTLE Analysis



Fishbone Diagram



Problem Tree Analysis



5 Whys



Risk Assessment Matrix

*Use these tools to
observe, analyze,
and dig deeper.*

**CLARITY TODAY.
IMPACT TOMORROW.**

PESTLE ANALYSIS

Go online
Ask Civis



Understand the big picture.

Use this tool to identify and analyze the key **external factors** that may impact your work. It helps you understand **opportunities**, **threats**, and the context around you.

PESTLE helps you explore the external factors that can influence your issue, organization, or strategy.

P POLITICAL



What political factors could influence your issue or work?

OPPORTUNITIES **THREATS**

E ECONOMIC



What economic conditions or trends could affect your work?

OPPORTUNITIES **THREATS**

S SOCIAL



What social or cultural trends could impact your work?

OPPORTUNITIES **THREATS**

T TECHNOLOGICAL



What technology or innovation could influence your work?

OPPORTUNITIES **THREATS**

L LEGAL



What laws, regulations, or policies could affect your work?

OPPORTUNITIES **THREATS**

E ENVIRONMENTAL



What environmental factors could impact your work?

OPPORTUNITIES **THREATS**

REFLECTION

- Which factors are the most relevant to your issue or context?
- Which are the biggest opportunities you can leverage?
- Which threats should you prepare for or address?
- How can these factors shape your strategy?

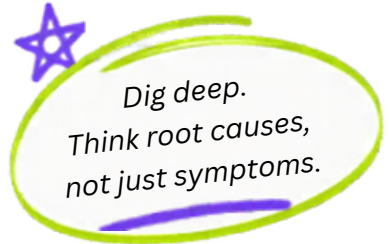
THE PROBLEM TREE

Identify roots. Understand effects. Create change.



The Problem Tree helps you explore a problem in depth. It shows how causes (roots) lead to the problem (trunk), and how that problem creates effects (branches).

→ Use it to understand the full picture and identify priority areas for action.



EFFECTS

What are the consequences or impacts of this problem?

EFFECTS

What are the consequences or impacts of this problem?

THE FOCAL PROBLEM / TOPIC

What is the main problem you want to address?

CAUSES

What are the underlying causes or root factors of this problem?

CAUSES

What are the underlying causes or root factors of this problem?

REFLECTION

- What surprised you the most as you mapped your problem?
- What root cause do you think is the most important to address?
- What effects are most urgent or concerning?
- What could change if this problem was solved?

Go online
Ask Civis



FISHBONE DIAGRAM

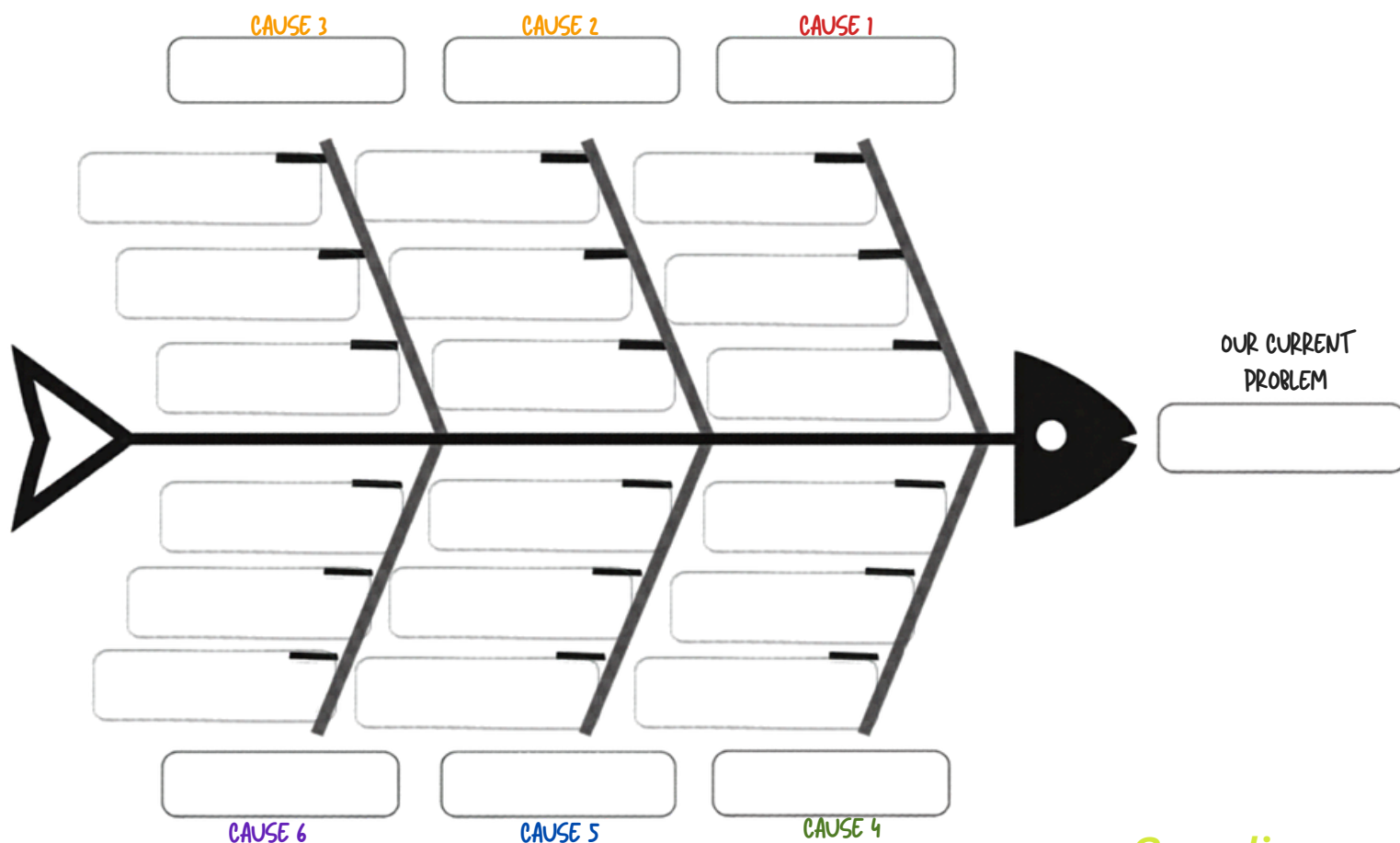


Find the real causes. Solve the right problem.

The Fishbone Diagram (Ishikawa Diagram) helps you identify, explore, and organize **all the potential causes** of a problem.

It's a powerful tool for **structured brainstorming** that helps you dig deeper and find root causes, not just symptoms.

Don't stop at the first cause.
Keep asking "why?" until you get to the root.



REFLECTION

Which causes seem to have the biggest impact?

Which root causes are within your control to address?

What additional information or insights do you need?

What actions can tackle the root causes, not just the symptoms?

Go online
Ask Civis



OUR GOAL:

Move beyond symptoms and uncover the real issue that needs to be addressed. ♥

5 WHY'S ANALYSIS

From symptoms to root causes

Go online
Ask Civis



Sometimes the first explanation is only part of the story. Keep asking "Why?" until you identify the underlying issue that can actually be addressed.

1

WHY #1

Why did this problem happen?



2

WHY #2

Why did the previous issue occur?



3

WHY #3

What deeper factor contributed to this?



4

WHY #4

Why does this underlying issue exist?



5

WHY #5

Why does this underlying issue exist?



WHAT IS THE PROBLEM?



Describe the challenge you want to understand.



THE ROOT CAUSE WE NEED TO ADDRESS



REFLECTION



→ Is this a cause within our control?

→ What evidence supports this conclusion?

→ What assumptions might we still be making?

→ Which root causes should we prioritize first?

NOTES

HART'S LADDER OF YOUTH PARTICIPATION

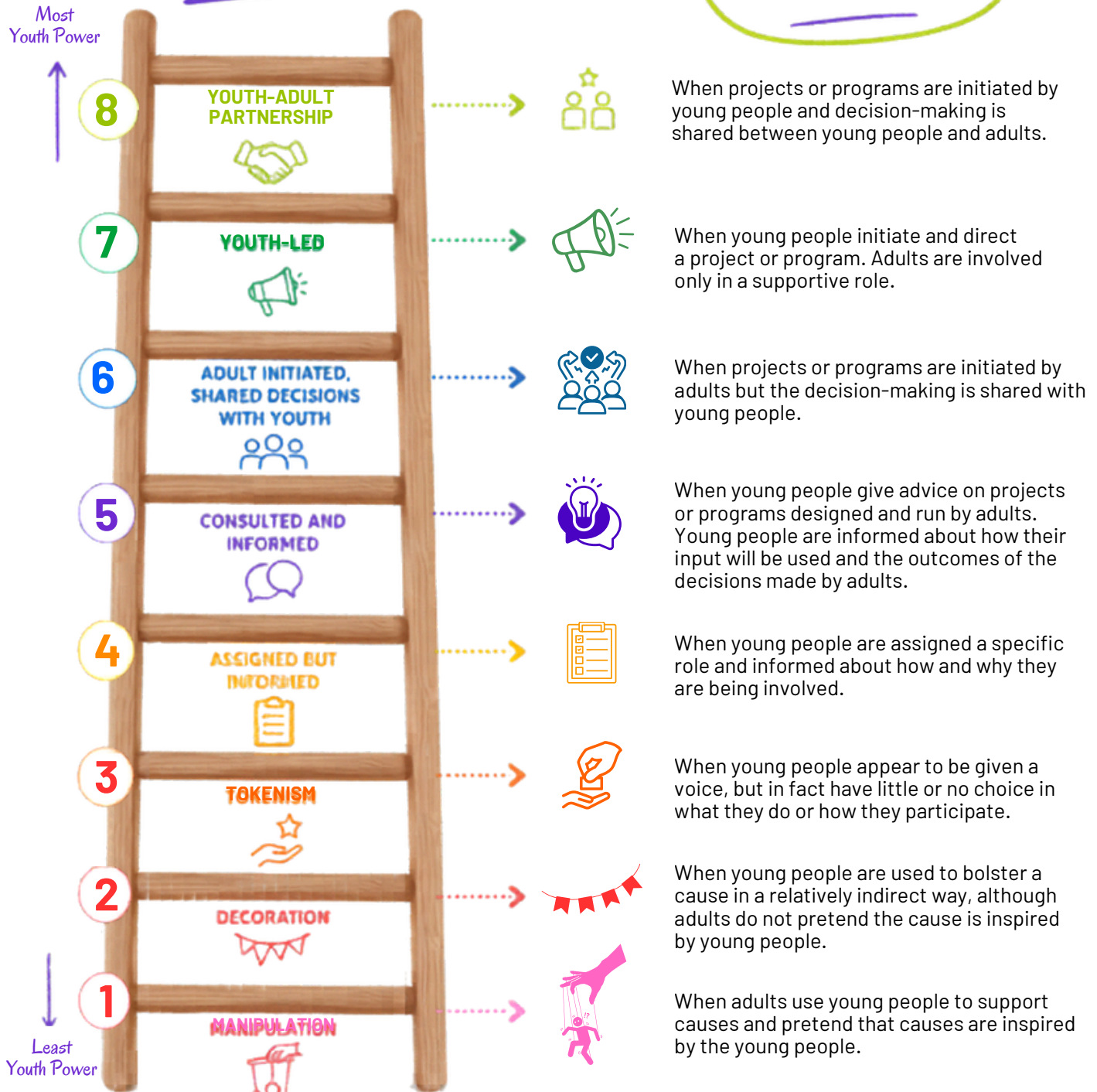
Not sure?
Ask Civis



This ladder shows the different ways adults and young people work together on projects and in decision-making.

The higher we climb, the more power and voice young people have.

Where does your project or organization fall on the ladder today?
Where do you want to be?





Make smarter decisions today for bigger impact tomorrow.

RISK AND IMPACT ASSESSMENT MATRIX

Assess, Prioritize, Act.

Not sure?
Ask Civis



Use this matrix to assess the potential impact and likelihood of key **risks and assumptions** related to your intended impact. This will help you prioritize what to explore further.

LIKELIHOOD	IMPACT				
	Negligible	Minor	Moderate	Major	Catastrophic
Very Low	Low	Low	Low	Medium	High
Low	Low	Low	Medium	Medium	High
Medium	Low	Medium	Medium	High	High
High	Medium	Medium	High	High	Extreme
Very High	Medium	Medium	High	Extreme	Extreme

HOW TO USE THIS MATRIX

1



List the key risks and assumptions related to achieving your intended impact.

2



Assess the likelihood of each risk occurring.

3



Assess the potential impact if the risk does occur.

4



Plot each risk on the matrix to see its overall level.

5



Focus on High and Extreme risks—these are your top priorities to investigate and mitigate.

OUR FUTURE.
OUR CHOICES.



II.

UNDERSTAND YOURSELF AND YOUR ECOSYSTEM

*Know yourself. Know your people.
Know your power.*

You can't create change alone. This section helps you understand your strengths, your community, and the people and systems around you.

Stronger connections. Smarter strategies. Greater impact together.



TOOLS IN THIS SECTION



SWOT Analysis



CAME Framework



Community Asset Mapping



Stakeholder Mapping



Power Mapping



Spectrum of Allies



Network Mapping

*Map your strengths.
Understand your
connections.
Build your power.*

**TOGETHER, WE
CAN GO FURTHER.**

WHAT IS SWOT?

Wanna know more?

Ask Civis



A SIMPLE
FRAMEWORK
FOR MAKING
SMARTER
DECISIONS.

SWOT stands for Strengths, Weaknesses, Opportunities and Threats. It helps us understand our situation from different angles so we can **plan, act, and grow**.



S



STRENGTHS

INTERNAL + POSITIVE

These are the things we do well or the advantages we have over others. They are inside our organization or under our control.

KEY QUESTIONS

- ✓ What do we do really well?
- ✓ What resources or assets do we have?
- ✓ What makes us unique or better than others?
- ✓ What are our biggest achievements?

W



WEAKNESSES

INTERNAL + NEGATIVE

These are the areas we struggle with or lack. They can hold us back or put us at a disadvantage. They are inside our organization or under our control.

KEY QUESTIONS

- ! What do we need to improve?
- ✓ What skills or resources are missing?
- What processes are not working well?
- What are others doing better than us?

O



OPPORTUNITIES

EXTERNAL + POSITIVE

These are external factors or trends we can take advantage of to achieve our goals or grow. They are outside our control.

KEY QUESTIONS

- ★ What trends or changes can we use?
- ★ Are there new markets or partnerships?
- ★ What external strengths can we leverage?
- ★ What opportunities exist in our environment?

T



THREATS

EXTERNAL + NEGATIVE

These are external risks or challenges that could hinder our progress or negatively impact our success. They are outside our control.

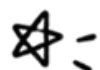
KEY QUESTIONS

- ✗ What challenges or risks do we face?
- ✗ What does our competition look like?
- ✗ Are there economic or market threats?
- ✗ What could prevent us from achieving our goals?

WHY IT MATTERS



By understanding our Strengths, Weaknesses, Opportunities, and Threats, we can make better decisions, solve problems, and create a plan for success.



Be real.
Be clear.
Build better
strategies.

SWOT ANALYSIS

Not sure?
Ask Civis



UNDERSTAND YOUR CONTEXT. BE HONEST

STRENGTHS

INTERNAL + POSITIVE

What gives us an advantage?

-
-
-
-
-

OPPORTUNITIES

EXTERNAL + POSITIVE

What opportunities can we use to
our advantage?

-
-
-
-
-

WEAKNESSES

INTERNAL + NEGATIVE

What slows us down or
holds us back?

-
-
-
-
-

THREATS

EXTERNAL + NEGATIVE

What external risks or challenges could
impact us?

-
-
-
-
-

OUR
CONTEXT

S

O

W

T

WHAT'S NEXT?

IDENTIFY

the most important
points in each area.

PRIORITIZE

what matters
most right now.

TAKE ACTION

use our strengths,
fix gaps, and seize
opportunities!

Better
decisions.
Stronger
impact.

★ NOT EVERYTHING HAS THE SAME WEIGHT. FOCUS YOUR ENERGY WHERE IT COUNTS. ♥

SWOT TIER SYSTEM



PRIORITIZE WHAT MATTERS MOST.

The SWOT Tier System helps you classify each finding by its impact and urgency so you can focus on what really matters and act strategically.

1

TIER 1
CRITICAL PRIORITIES

Act now.



If we ignore this, our mission is at risk.

EXAMPLES

✓ High impact	S	W	O	T
✓ High urgency				
✓ Can determine success or failure				
	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
	• Highly trusted community leaders	• No funding for operations	• Upcoming national elections	• Restrictive legislation targeting NGOs

? **GUIDING QUESTION:**
If we could only address ONE thing this month, what would it be?

2

TIER 2
IMPORTANT PRIORITIES

Plan next.



These matter, but they are not urgent.

EXAMPLES

✓ Moderate impact	S	W	O	T
✓ Not urgent				
✓ Include in planning (6–12 months)				
	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
	• Strong volunteer base	• Limited social media strategy	• New partnership opportunities	• Emerging political polarization

? **GUIDING QUESTION:**
What should we intentionally strengthen or monitor over the next 6–12 months?

3

TIER 3
MONITOR & OBSERVE

Keep an eye on this.



Keep an eye on this.

EXAMPLES

✓ Low impact	S	W	O	T
✓ Low urgency				
✓ Important for continuous monitoring				
	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
	• Access to occasional technical assistance	• Lack of office space	• New technologies still emerging	• Potential future regulatory reforms

? **GUIDING QUESTION:**
What should we continue monitoring without dedicating significant resources yet?

HOW TO APPLY IT

- 1 COMPLETE YOUR SWOT**
List all your Strengths, Weaknesses, Opportunities, and Threats.
- 2 INDIVIDUAL VOTING**
Each participant gets:
• 3 votes for Tier 1
• 3 votes for Tier 2
• Unlimited votes for Tier 3
- 3 COLLECTIVE CLASSIFICATION**
Discuss and place each item in the Tier that best reflects its impact and urgency.
- 4 FOCUS & PLAN**
Move Tier 1 items to action in your CAME plan. Monitor Tier 2 and Tier 3.

IMPACT × URGENCY MATRIX



FROM SWOT TO ACTION

TIER 1
CRITICAL PRIORITIES
Must go into your CAME plan. Act now with intention.

TIER 2
IMPORTANT PRIORITIES
Choose the top 2–3 to include in your strategy.

TIER 3
MONITOR & OBSERVE
Track over time and update as context changes.

GOOD STRATEGY IS ABOUT CHOOSING WHAT MATTERS MOST. ♥



SWOT INTROSPECTION GAME

Not sure?
Ask Civis



You. Your context. Your truth.

HOW TO PLAY

- 1 Find a quiet space. You need just you and your thoughts.
- 2 Take a deep breath. Be honest with yourself.
- 3 Read each question slowly and reflect deeply.
- 4 Write your answers in this page.
- 5 Use your insights to take action and grow.



S

STRENGTHS

What are my greatest strengths?



What am I really good at?

What resources do I have (skills, qualities, people, opportunities)?

W

WEAKNESSES

What areas do I struggle with?



What holds me back from being my best self?

What bad habits or mindsets do I need to change?

my
CURRENT
REALITY

O

OPPORTUNITIES

What opportunities are around me that I can take advantage of?

What trends or changes could I use to my benefit?

What could I do that would move me closer to my goals?



T

THREATS

What challenges or obstacles could get in my way?

What external factors could impact my progress?

What risks should I be aware of?



REFLECTION TIME



After completing your SWOT, take a moment to reflect:

What surprised me the most?

What did I learn about myself?



FROM INSIGHT TO ACTION

Based on your answers, what is ONE small step you can take this week to move forward?

My commitment to myself

CAME Analysis

TURN INSIGHTS
INTO STRATEGY.
TAKE ACTION.
CREATE IMPACT.

Not sure?
Ask Civis



OUR GOAL:
MAKE SMARTER
DECISIONS TODAY
FOR BIGGER
IMPACT
TOMORROW.

CAME ROADMAP

FROM INSIGHTS TO ACTION.

Not sure?
Ask Civis



	1. WHAT WE FOUND (FROM SWOT)	2. WHAT WE WILL DO (CAME ACTION)	3. EXPECTED IMPACT (RESULTS)
C CORRECT WHAT WEAKNESSES DO WE NEED TO FIX?	WRITE IT HERE	OUR ACTIONS	THE IMPACT WE WANT
A ADAPT WHAT THREATS DO WE NEED TO PREPARE FOR?	WRITE IT HERE	OUR ACTIONS	THE IMPACT WE WANT
M MAINTAIN WHAT STRENGTHS MUST WE KEEP BUILDING ON?	WRITE IT HERE	OUR ACTIONS	THE IMPACT WE WANT
E EXPLOIT WHAT OPPORTUNITIES CAN WE TAKE ADVANTAGE OF?	WRITE IT HERE	OUR ACTIONS	THE IMPACT WE WANT
NEXT STEPS: WHAT WILL WE DO FIRST?			
1	2	3	

small steps. Big impact.

OUR GOAL:

Identify and understand
the people and
organizations who
influence or are affected
by our advocacy.

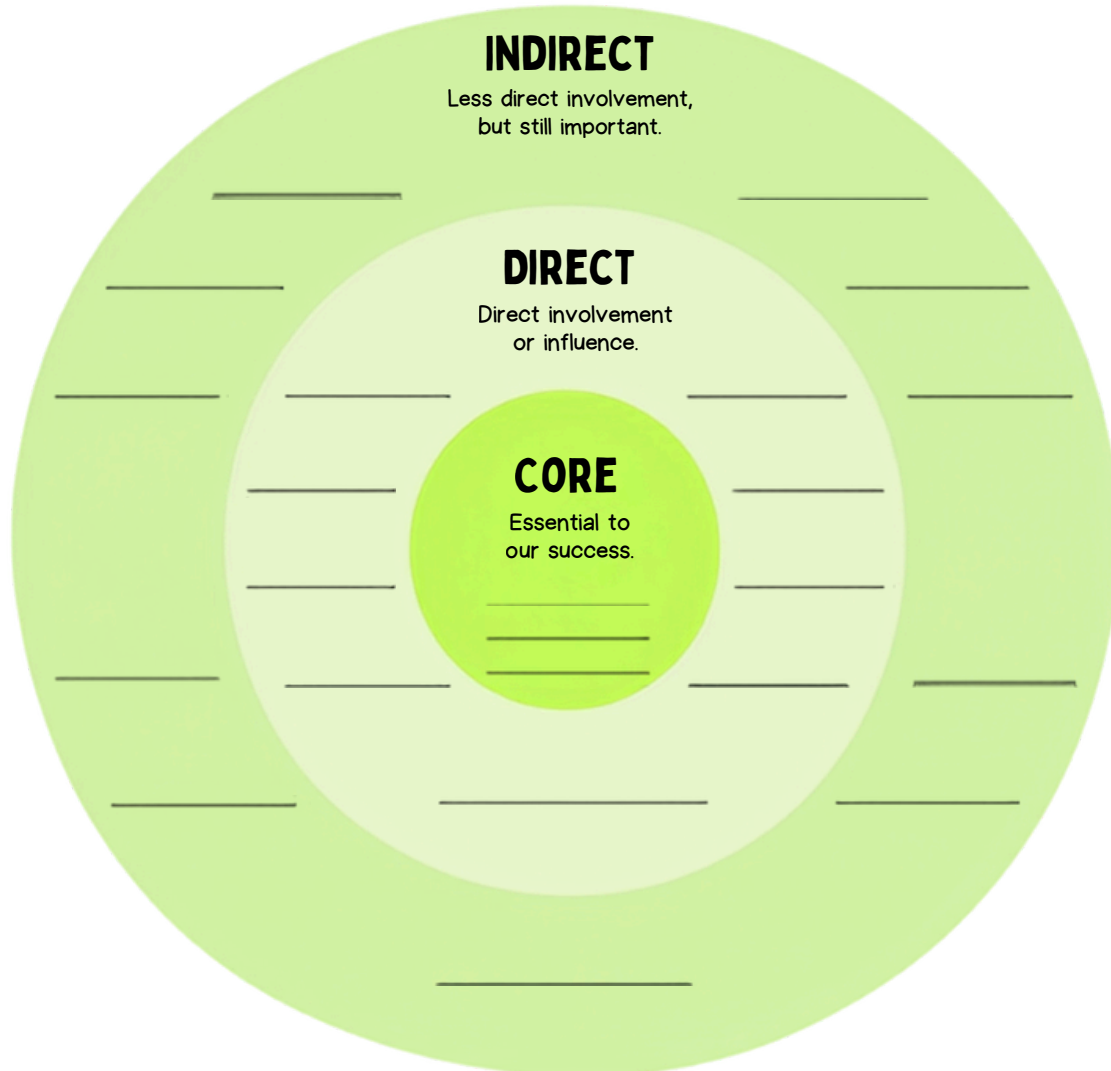


STAKEHOLDER MAPPING

WHO MATTERS. WHO INFLUENCES. WHO WE ENGAGE.

Use this tool to identify key stakeholders in your issue or campaign.
Place them in the circle that best represents their level of
involvement or influence.

Not sure?
Ask Civis



REFLECTION



Who are our most important stakeholders (core)?

→ Who do we need to engage more directly (direct)?

→ Who can support or influence us from the outside (indirect)?

→ Are there any missing voices we should include?

OUR NEXT STEPS



Based on our map, what actions will we take?

1 _____

2 _____

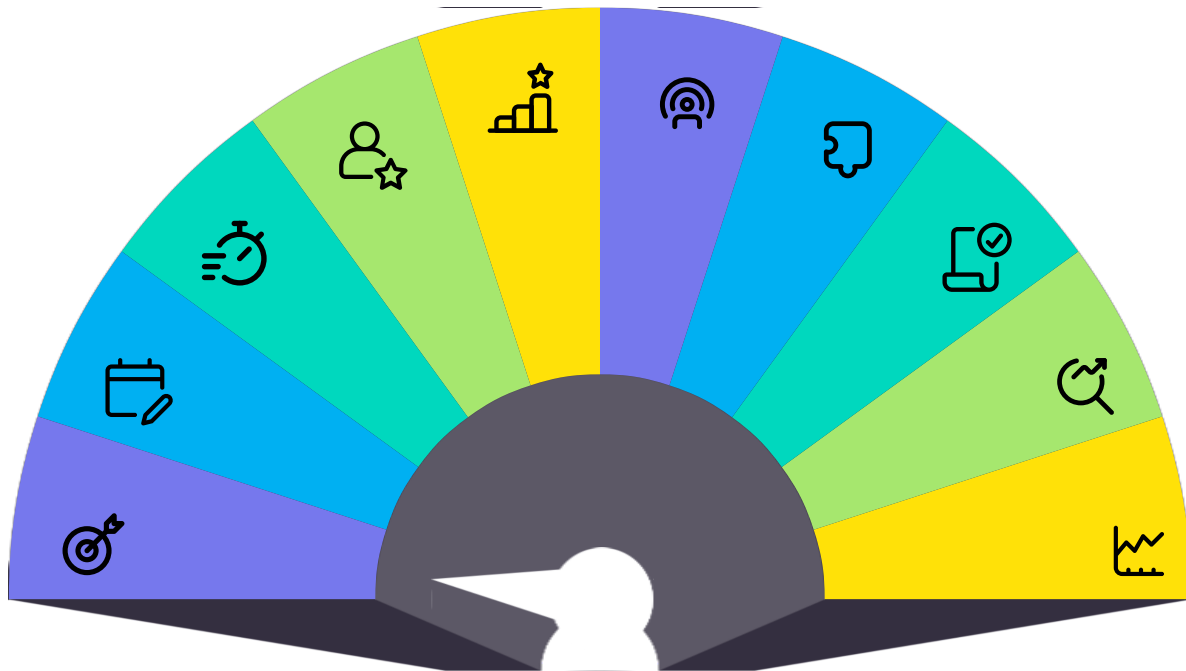
3 _____

STAKEHOLDER MANAGEMENT SUCCESS INDICATORS

These indicators help you measure how well you are engaging and managing your stakeholders.

Use them to track progress and improve your strategies.

Not sure?
Ask Civis



01

Identification Accuracy. Clarity and completeness of stakeholder mapping.

TARGET:

06

Influence Alignment. Stakeholder support for strategic objectives.

TARGET:

02

Engagement Frequency. Consistency of communication aligned with stakeholder needs.

TARGET:

07

Conflict Resolution. Effectiveness in resolving problems.

TARGET:

03

Response Timeliness. Speed in addressing stakeholder issues and requests.

TARGET:

08

Information Quality. Clarity and relevance of shared information.

TARGET:

04

Satisfaction Levels. Overall stakeholder satisfaction with interactions.

TARGET:

09

Resource Efficiency. Efficient use of resources for stakeholder management.

TARGET:

05

Trust Index. Level of confidence in organizational reliability.

TARGET:

10

Strategic Impact. Impact on business goals and outcomes.

TARGET:

REFLECTION

- ➔ Which indicators are your strongest?
- ➔ Which indicators need the most improvement?
- ➔ What actions will you take to improve?

POWER MAP

Not sure?
Ask Civis



UNDERSTAND INFLUENCE. BUILD STRATEGY. CREATE IMPACT.

A Power Map helps you identify the people, groups, or organizations connected to your project and understand their level of power and interest.

HOW TO USE IT

- 1 List key people, groups, or organizations related to your project.
- 2 Place each one on the map based on their **POWER** and **INTEREST**.
- 3 Use the insights to decide how to engage with each stakeholder.
- 4 Review and update your map as relationships and contexts change.

WHAT DO THEY MEAN?



POWER

The ability to influence or make decisions.



INTEREST

The level of interest or concern in your project.



CLOSENESS

How clear they are to work with or community.



INFLUENCE TYPE

Can they support, neutral, or oppose your mission?

HIGH

POWER

LOW

KEEP SATISFIED



They have power but may not be very interested in your project.

WHAT TO DO:

- Keep them informed.
- Show how your work aligns with their goals.
- Build trust and maintain a positive relationship.

WHO?

MANAGE CLOSELY



They have power and are very interested in your project. They are key players!

WHAT TO DO:

- Involve them in decisions.
- Engage regularly.
- Leverage their support and collaboration.

WHO?

MONITOR



They have low power and may not be very interested.

WHAT TO DO:

- Monitor their activity.
- Keep them updated occasionally.
- Potential allies in the future.

WHO?

KEEP INFORMED



They are interested in your project but have limited power.

WHAT TO DO:

- Keep them informed.
- Listen to their insights.
- Empower and mobilize them as ambassadors or supporters.

WHO?

LOW

INTEREST IN PROJECT

HIGH

PLOT YOUR STAKEHOLDERS

STAKEHOLDER	POWER (H/L)	INTEREST (H/L)	CLOSENESS (CLOSE / SOME / FAR)	INFLUENCE TYPE (+ / 0 / -)
1				
2				
3				
4				
5				

INFLUENCE TYPE: + SUPPORTIVE

0 NEUTRAL

- OPPOSED

REFLECTION



WHO ARE OUR MOST IMPORTANT ALLIES?



WHO COULD BLOCK OR CHALLENGE OUR WORK?



WHO CAN WE ENGAGE MORE INTENTIONALLY?



RELATIONSHIPS CHANGE.
KEEP YOUR MAP ALIVE!



OUR GOAL:

Identify and celebrate the strengths, resources, and people that already exist in our community. We build from what we have to create the change we want!

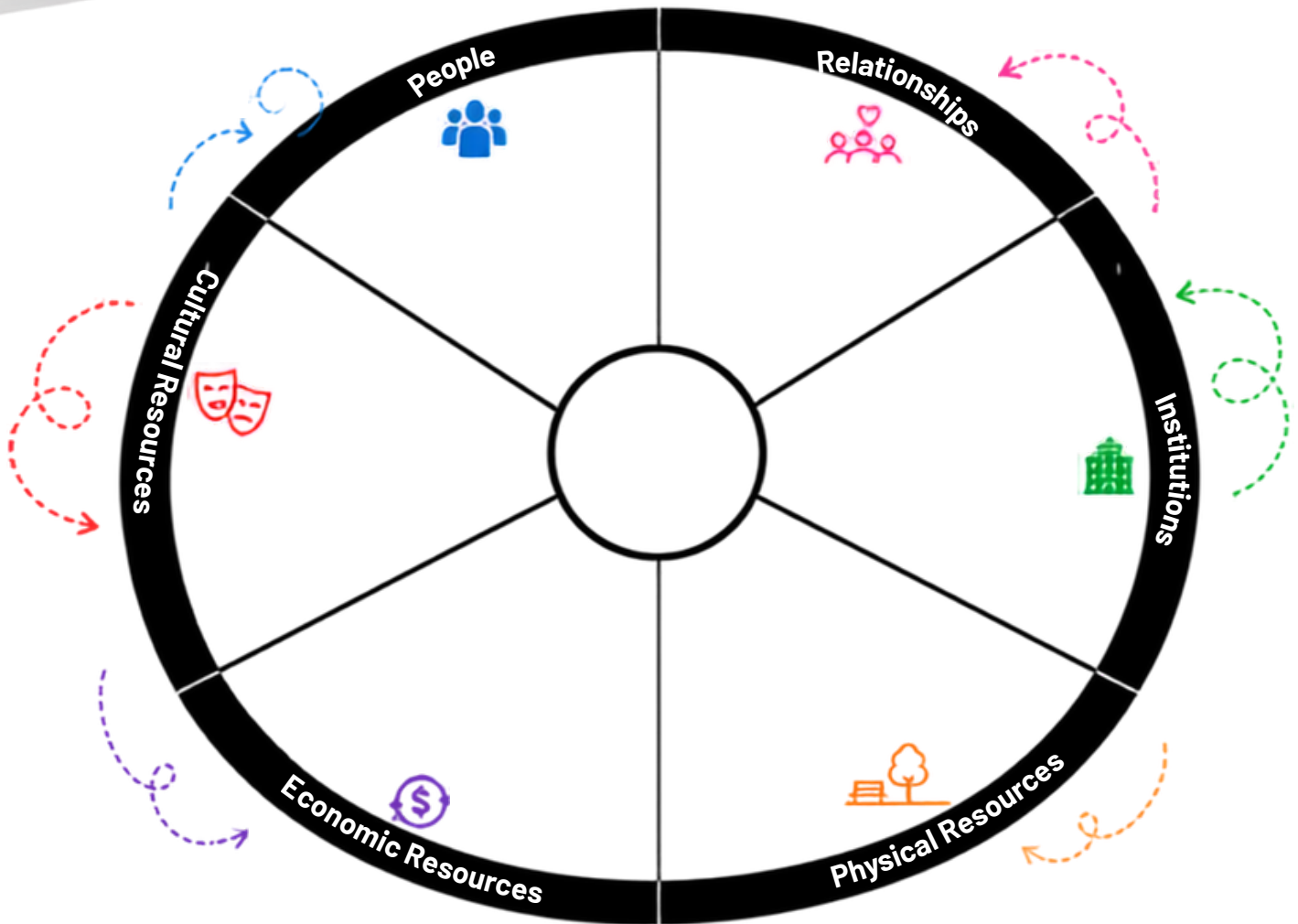


COMMUNITY ASSET MAPPING

SEE WHAT'S STRONG, BUILD WHAT'S NEXT.

Use this tool to map the people, relationships, institutions, and resources that exist in your community. These assets are the foundation for your advocacy and collective power.

Not sure?
Ask Civis



OUR TOP COMMUNITY ASSETS



What are the 5 assets we can build on right now?

1

2

3

4

5

REFLECTION

Which assets are most underused?

Who are key connectors in our community?

What assets are we missing?

How can we strengthen and invest in these assets?

OUR COMMUNITY IS FULL OF STRENGTH.
WHEN WE CONNECT OUR ASSETS, WE **CREATE REAL CHANGE.**



OUR GOAL:

Strengthen our connections, build bridges, and grow a powerful ecosystem for change.



NETWORK MAPPING

UNDERSTANDING CONNECTIONS, INFLUENCE & COLLABORATION

Who connects whom?

Which actors are isolated?

Who are bridge-builders?

Use this tool to visualize relationships among actors in your movement ecosystem.

Not sure?
Ask Civis



EXTENDED NETWORK

Partners, supporters, and influencers in your ecosystem

CORE ALLIES

People and groups closest to your work

YOUR CAMPAIGN / ISSUE

(Write your issue or campaign focus here)

BRIDGE BUILDERS

Who connects different groups together?

1. _____
2. _____
3. _____

ISOLATED ACTORS

Who should be more connected?

1. _____
2. _____
3. _____

MISSING VOICES

Who is not in the room yet?

1. _____
2. _____
3. _____

NETWORK HEALTH CHECK



Use the key below to assess the strength of your relationships.



STRONG CONNECTION

We work closely together and trust each other.



OCCASIONAL CONTACT

We interact sometimes but not consistently.



NO RELATIONSHIP

We have little to no connection.



DRAW LINES BETWEEN ACTORS

Show relationships using the key above.



REFLECTION QUESTIONS



- Which actor has the most connections (influence)?
- Which relationship is most strategic for our goals?
- Where are the biggest gaps in our network?
- Who could become a bridge-builder?
- What connection should we strengthen first?

III.

DESIGN YOUR STRATEGY

*Big change starts
with a solid plan.*

This section helps you turn insights into action. Explore options, set clear goals, and choose strategies that create real impact.

**Good strategies are intentional,
flexible, and future-ready.**



TOOLS IN THIS SECTION



Theory of Change



SMART Objectives



Strategic Planning Models



Scenario Planning



Impact-Effort Matrix



Advocacy Strategy Canvas

*Explore possibilities.
Make choices.
Create impact.*

**A STRATEGY TODAY.
CHANGE TOMORROW.**





DEVELOP YOUR INTENDED IMPACT

Test your results
Ask Civis



What change would you like to see in the world as a result of your organization's work? Outline your hypothesis on the **WHO**, **WHERE**, and **WHAT** below. Consider a **5-10** year time horizon when defining your intended impact.

WHO	WHERE	WHAT



What additional actors might you work with to achieve your intended impact?



By choosing the areas of focus you described above, what might you NOT prioritize?



KEEP IN MIND

- ✓ The WHO is your reason for being.
- ✓ Focus on one priority population when possible.

- ✓ Not every organization needs a targeted WHERE. Some may focus at a regional or country level.

- ✓ * Outcomes (WHAT) should be ambitious, measurable, and achievable.
- ✓ Avoid focusing only on outputs (activities).

THEORY OF CHANGE

A Theory of Change helps you map how your actions lead to the change you want to see. It keeps your strategy focused, intentional, and impact-driven.

Big change starts with clarity.



EXPLORE

Walk through each step with your team. Ask questions, Challenge assumptions.

REFLECT

What do you believe will happen? Why? What needs to be true for change to occur?

ALIGN

Make sure everyone shares the same understanding of the path to impact.

ACT

Use your Theory of Change as a guide to make decisions and adapt along the way.



DEVELOP YOUR THEORY OF CHANGE

Test your results

Ask Civis



Describe the elements (skills, capabilities, or expertise) that make your organization **distinctly good** at what it does.



HOW will you achieve your intended impact?

 APPROACHES	 LINKAGES	 ESSENTIAL ACTIVITIES	 CONTRIBUTION TO IMPACT	 ALLOCATION
What approaches or types of work are critical to achieve your intended impact?	How do your approaches link to and reinforce each other?	What aspects of each approach are particularly essential for impact?	How does each approach contribute to your intended impact?	What percent of your organization's time and resources would you spend on each approach?
 List the approaches at a fairly high level. They should be critical to achieving the WHAT of your intended impact. Avoid listing individual programs.	 Describe how your approaches connect or reinforce each other to create greater impact. This may explain why this set works together.	 Highlight specific activities within each approach that are essential for impact (e.g., how you deliver your work, dosage, duration, key practices).	 Describe how each approach contributes to achieving the WHAT of your intended impact. Each approach may represent a first step or intermediate outcome.	 Estimate the percent share of time and resources for each approach. The total should add up to 100%.



KEEP IN MIND

✓ Your approaches should be a focused set that reflects your strategy.



Linkages show how your work creates more impact together than apart.



Allocation helps ensure your resources match your strategic priorities.

SMART GOALS

*Plan with intention.
Act with purpose.*

Test your results

Ask Civis



SMART goals help you turn your ideas into clear, achievable objectives. Use this tool to make sure your goals are: **Specific, Measurable, Achievable, Relevant, and Time-bound.**

HOW TO PLAY

- 1 Choose or write a goal you want to achieve.
- 2 Work through each SMART element.
- 3 Score points as you go!
- 4 Aim for 25 points ✨
- 5 SMART GOAL MASTER! 📌

YOUR SCORE

/25

GOAL BUILDER

What is the goal you want to achieve?

				
S	M	A	R	T
SPECIFIC	MEASURABLE	ACHIEVABLE	RELEVANT	TIME-BOUND
Be clear and specific. What exactly do you want to achieve?	How will you measure your progress? What data will you track?	Is this goal realistic and achievable? Do you have what you need?	Why does this goal matter? How does it align with your mission or values?	What is your deadline? When will you achieve this goal?
Write your specific goal:	How will you measure it?	Why is it achievable?	Why is it relevant?	What is the deadline?

ACTION PLAN

What are the 3 key actions you will take to achieve this goal?

- 1
- 2
- 3

Challenge yourself, track your progress, celebrate your wins!

PREDICT YOUR SUCCESS

On a scale from 1 to 5, how confident are you that you will achieve this goal?



REFLECTION

- What is the first step you will take?
- What could get in the way of achieving this goal?
- How will you stay motivated?
- When will you review your progress?

STRATEGIC PLANNING MODELS

Questions?
Ask Civis



Choose the right strategy based on your context, **realities**, and **capacities**. There is no one-size-fits-all.

THREE STRATEGIC APPROACHES

OFFENSIVE STRATEGY (GROW & EXPAND)



Focus on growth, innovation, and creating new opportunities. Ideal when you have the resources and the context is **favorable**.

WHEN TO USE IT

- Opportunities in the environment are favorable.
- You have strong capabilities and resources.
- You want to expand your impact or reach new audiences.

KEY ACTIONS

- Innovate and create value.
- Invest in growth and partnerships.
- Take calculated risks.
- Position yourself as a leader.

DEFENSIVE STRATEGY (PROTECT & OPTIMIZE)



Focus on protecting what you have, optimizing processes, and minimizing risks. Ideal in **uncertain** or highly **competitive** contexts.

WHEN TO USE IT

- The environment is uncertain or unstable.
- Resources are limited.
- You need to protect your position or strengthen internal operations.

KEY ACTIONS

- Improve efficiency and reduce costs.
- Strengthen internal capacities.
- Manage risks proactively.
- Protect key relationships.

REORIENTATION STRATEGY (ADAPT & TRANSFORM)



Focus on adapting, learning, and transforming your approach. Ideal when your context or goals have **changed** significantly.

WHEN TO USE IT

- Your context has changed significantly.
- Current strategies are no longer effective.
- You need to realign your mission, model, or priorities.

KEY ACTIONS

- Listen, learn, and diagnose.
- Redefine priorities and strategies.
- Experiment and iterate.
- Build new capabilities.

HOW TO CHOOSE



1. ANALYZE CONTEXT

Understand your internal situation and external environment.



2. ASSESS CAPACITIES

Identify your strengths, limitations, and available resources.



3. CHOOSE APPROACH

Select the strategy model that best fits your reality and objectives.



4. PLAN & ACT

Define actions, allocate resources, and move forward with focus.

REFLECTION

Which strategy model fits your current context best?
What strengths can you build on?
What changes or actions are needed to move forward?



OUR GOAL:

Turn our vision into action with clear objectives and strategic steps that create impact.



STRATEGIC PLANNING OBJECTIVES & ACTIONS



CLEAR GOALS. SMART ACTIONS. REAL CHANGE.

Great strategies start with clear objectives and intentional actions. Define what you want to achieve and the steps you will take to get there.

OUR OBJECTIVES



What do we want to achieve? List 3–5 key objectives that will move us closer to our goal.

1

2

3

4

5

OUR ACTIONS

What specific actions will we take for each objective?
List the key actions, who is responsible, and the timeline.

KEY ACTIONS

WHO

WHEN

KEY ACTIONS

WHO

WHEN

KEY ACTIONS

WHO

WHEN

KEY ACTIONS

WHO

WHEN

KEY ACTIONS

WHO

WHEN

REFLECTION

Are our objectives aligned with our overall goal?

Do our actions match our capacity and resources?

What could get in the way of our success?

How will we know if we are making progress?

NOTES & IDEAS

**GOOD PLANS DON'T STAY ON PAPER.
WE TAKE ACTION. WE LEARN. WE CREATE CHANGE.**

*Not sure?
Ask Civis*



OUR GOAL:

Design a powerful advocacy strategy that drives change and creates impact.



ADVOCACY STRATEGY CANVAS

ONE PLAN. ONE VOICE. BIGGER IMPACT.

Use this canvas to bring your advocacy strategy to life.
Keep it clear. Keep it focused. Keep it people-centered.

Test your results

Ask Civis



1. OUR GOAL

What change do we want to see?



2. DECISION-MAKER

Who has the power to make or influence this change?



3. TARGET AUDIENCE

Who do we need to reach, mobilize, or influence?



4. OUR ASK

What are we asking the decision-maker (or others) to do?



5. OUR TACTICS

What actions will we take to achieve our goal and influence change?

TACTIC / ACTION



PURPOSE

Why are we doing this?



AUDIENCE

Who is this for?



LEAD / PARTNER

Who is responsible or involved?



RESOURCES NEEDED

What do we need to make it happen?



6. TIMELINE

Key moments and milestones



7. SUCCESS INDICATORS

How will we know we're making progress?
What will success look like?

- _____
- _____
- _____
- _____

RISKS & ASSUMPTIONS

What challenges might we face?
What assumptions are we making?

OUR KEY MESSAGE

What is the main message we want to share?

OUR WHY

Why does this matter to us and our community?



OUR GOAL:

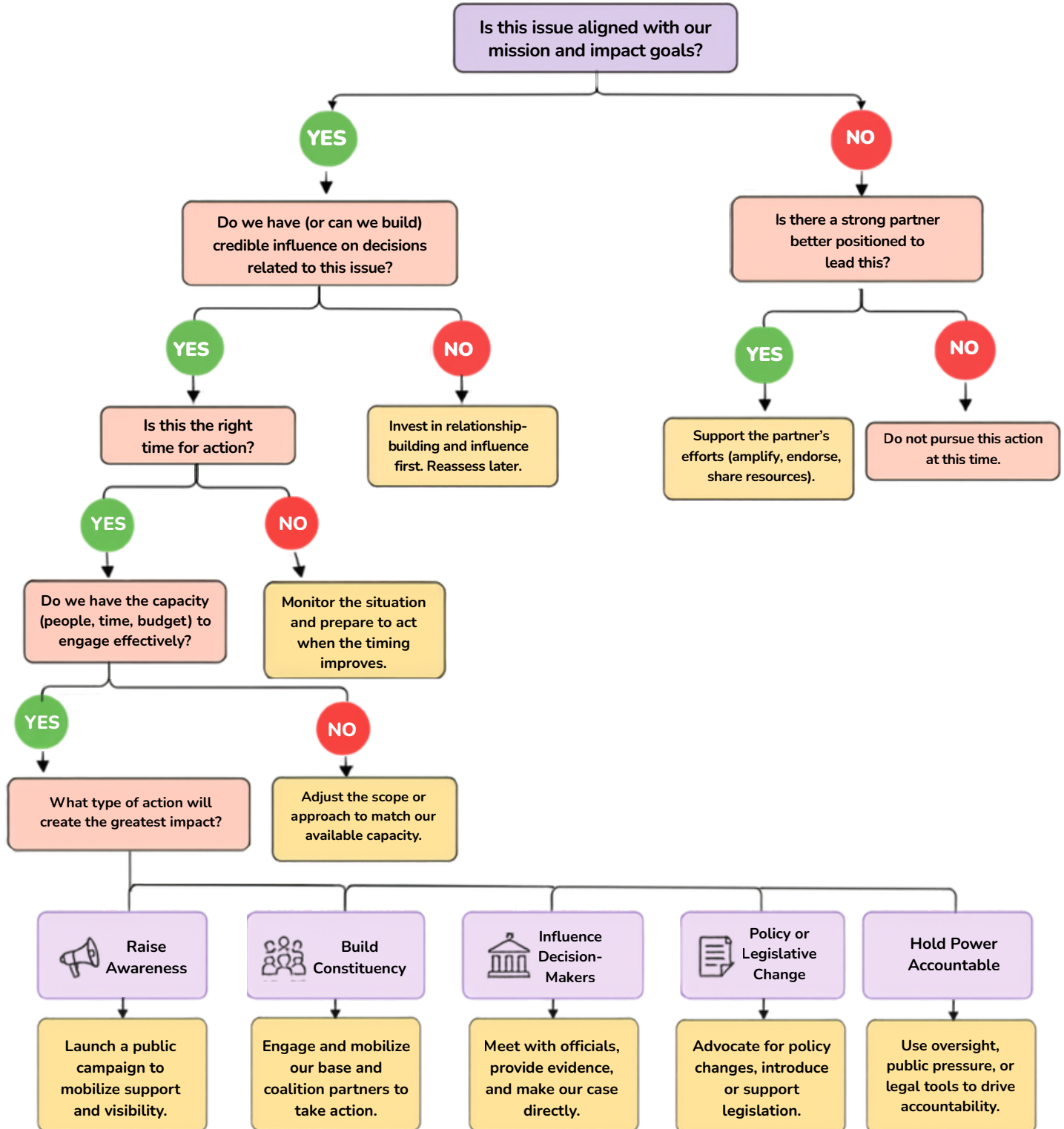
USE THIS TOOL TO
CHOOSE THE BEST
ADVOCACY OR POLITICAL
ENGAGEMENT ACTION
FOR THE IMPACT WE
WANT TO ACHIEVE.

ADVOCACY ACTION DECISION TREE

MAKE SMARTER CHOICES. MAXIMIZE OUR IMPACT.



Use this decision tree to decide the best course of action for an advocacy or political engagement opportunity. Answer each question with **YES** or **NO** and follow the path to the recommended action.



IMPACT-EFFORT MATRIX

Prioritize your actions based on **impact** and **effort**. Focus your energy where it matters most.

Need Advice?
Ask Civis



HOW TO USE

- 1 List all potential actions or initiatives.
- 2 Estimate their impact on your mission.
- 3 Assess the effort or resources required.
- 4 Place each item in the matrix.
- 5 Start with your **Quick Wins**!



REFLECTION



Which Quick Wins can you implement this week?



Which Strategic Projects require partnerships or additional resources?



Which activities should you stop doing or reconsider?

TOP 5 PRIORITIES

- 1
- 2
- 3
- 4
- 5

OUR CAMPAIGN GOAL

CAMPAIGN TIMELINE (GANTT CHART)

FROM STRATEGY TO ACTION

PLAN YOUR ADVOCACY JOURNEY.
 IDENTIFY MILESTONES, ACTIONS, AND MOMENTS THAT MATTER.



KEY MILESTONES

1. MILESTONE
2. LAUNCH
3. COALITION MEETING
4. DECISION-MAKER MEETING
5. FINAL ASK
6. OUTCOME

ACTIONS	WEEK 1	WEEK 2	WEEK 3	WEEK 4	WEEK 5	WEEK 6	WEEK 7	WEEK 8
RESEARCH & INTELLIGENCE								
COALITION BUILDING								
STAKEHOLDER MEETINGS								
PUBLIC CAMPAIGN								
MEDIA OUTREACH								
EVALUATION & LEARNING								

CAMPAIGN CHECKPOINTS

Before launching, do you have?

☐ Clear objective
 ☐ Decision-maker identified
 ☐ Stakeholder map completed
 ☐ Key message defined
 ☐ Coalition partners engaged
 ☐ Resources and budget secured
 ☐ Risks assessed
 ☐ Communications plan ready

MOMENTS TO WATCH

Important external moments that may impact our campaign.

→ Elections

→ Legislative sessions

→ Budget discussions

→ International events

→ Media opportunities

Other:

REFLECTION

What is the most important moment in this timeline?

What activity could delay the campaign?

What should happen first?



OUR GOAL:

Protect people,
reduce harm, and
create safer spaces
to exercise our
rights.



CIVIC RISK ASSESSMENT

BE INFORMED. BE PREPARED. BE SAFER.



Every action has risks. Our job is not to avoid all risks, but to understand them, prepare for them, and protect each other.



TIP

Security is not
paranoia — it's
care for yourself
and for others.



This is not about fear.
This is about responsibility.

Fill this out together as a team before your action.
Be honest. Be specific. Be prepared.

DIMENSION	GUIDING QUESTIONS	LIKELIHOOD	IMPACT	MITIGATION - WHAT CAN WE DO?	PROCEED?
 1. LEGAL Do participants understand the legal framework?	- Do we know our rights? - Are there laws that could be used against us? - Do we know what to do if we are detained?	☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low		☐ Yes ☐ With Cautions ☐ Pause and rethink
 2. PHYSICAL Could anyone face physical harm?	- Could there be violence from authorities or counter-protestors? - Is the location safe? - Do we have first aid, exits, and safety plans?	☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low		☐ Yes ☐ With Cautions ☐ Pause and rethink
 3. DIGITAL Are devices, identities and communications protected?	- Could there be violence from authorities or counter-protestors? - Is the location safe? - Do we have first aid, exits, and safety plans?	☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low		☐ Yes ☐ With Cautions ☐ Pause and rethink
 4. PHYSCHOSOCIAL Could our actions affect wellbeing or relationships?	- Could this cause stress, anxiety or trauma? - Could it affect family relationships? - Do we have emotional support available?	☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low		☐ Yes ☐ With Cautions ☐ Pause and rethink
 5. REPUTATIONAL Could anyone face physical harm?	- Could this affect our studies, job or future opportunities? - Could photos, videos, posts, harm us later? - Could we be misrepresented or targeted online?	☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low		☐ Yes ☐ With Cautions ☐ Pause and rethink

WHAT DO OUR RESULTS TELL US?

Count your highest risk levels:

- ☐ HIGH (red)
- ☐ MEDIUM (yellow)
- ☐ LOW (green)



LOW RISK

We are generally well prepared.
Let's stay alert and keep taking care of each other.



MEDIUM RISK

We have some vulnerabilities.
Let's strengthen our plan before we act.



HIGH RISK

The risks are too high right now.
Let's pause and revise our plan to keep everyone safe.



NOTES & OTHER CONCERNS



WHO DO WE CONTACT IF SOMETHING HAPPENS?

Legal support: _____
 Emergency contact: _____
 Medical contact: _____
 Other: _____

Need Advice?
Ask Civis



IV.

MOBILIZE AND COMMUNICATE

*The right message.
To the right people.
At the right time.*

This section helps you build strong messages, reach your audiences, and take action together for change.

Communicate with clarity.
Mobilize with purpose.



TOOLS IN THIS SECTION



Message Box Framework



Narrative Change Framework



Audience Segmentation Matrix



Escalation Ladder



Campaign Timeline / Gantt Chart

*Tell the story.
Move hearts.
Drive action.*

**STRONGER MESSAGES.
GREATER MOVEMENTS.**



OUR GOAL:

Communicate in a way that inspires action and creates real change in our community.



MESSAGE BOX FRAMEWORK

FROM PROBLEMS TO PERSUASION

Build messages that connect with what your audience already cares about.



WHY DOES THIS MATTER?



A good message does not start with what YOU want to say. It starts with what YOUR AUDIENCE is experiencing. Use this tool to connect:



The problem they feel



Your proposed solution



The benefits they care about



The values they already believe in

PROBLEMS



What challenges is your audience experiencing?

- What frustrates them? _____
- What worries them? _____
- What barriers do they face? _____

BENEFITS

How will people benefit?

- What improves?
- What becomes easier?
- What becomes possible?



ISSUE

What issue are you trying to address?

VALUES

What matters most to this audience?

- Freedom?
- Security?
- Opportunity?
- Fairness?
- Community?

SOLUTIONS



What are you proposing?

- What action should happen?
- What change are you advocating for?



MESSAGE TEST



Before using your message, ask:

- ☐ Would my audience recognize this problem?
- ☐ Does the solution feel realistic?
- ☐ Are the benefits meaningful to them?
- ☐ Does this connect with their values?
- ☐ Would they repeat this message to others?



THE 30-SECOND TEST



Write your final key message:



SPEAK IT OUT LOUD

- If it sounds natural in a conversation, you're ready.
- If it sounds like a policy paper, simplify it.





OUR GOAL:

Use stories to shift mindsets, influence decisions, and build a more just and sustainable world.



NARRATIVE CHANGE FRAMEWORK

CHANGE THE STORIES. CHANGE THE FUTURE.

Narrative change is a strategy that shifts the stories people believe about issues, ourselves, and each other—so we can change norms, policies, and systems.



KEY DEFINITIONS



NARRATIVE

The short themes and ideas that permeate collections of stories.



NARRATIVE CHANGE

Altering shared beliefs, values, and behaviors by changing the stories we tell in our homes, workplaces, and communities.



NARRATIVE LANDSCAPE

A map of the harmful and helpful narratives that affect how people think about, talk about, and make decisions about issues.



NARRATIVE STRATEGY

The short and long-term efforts to promote certain values and diminish others through specific narratives and stories.

THE 4 STEPS OF NARRATIVE CHANGE

1

UNDERSTAND THE NARRATIVE LANDSCAPE

Map the stories shaping the conversation.

Identify:

- Dominant (status quo) narratives
- Emerging (alternative) narratives
- Absence (missing) narratives



KEY INSIGHTS

2

CHOOSE YOUR NARRATIVE DIRECTION

Decide what needs to shift and why.

Determine:

- Which narratives to amplify
- Which narratives to challenge
- The values you want to advance



OUR FOCUS

3

DEVELOP YOUR NARRATIVE STRATEGY

Design how you will tell better stories.

Consider:

- Key messages & themes
- Story types (data, personal stories, humor, etc.)
- Messengers & messengers influencers
- Channels & platforms
- Timing & opportunities

OUR APPROACH

4

TAKE ACTION & LEARN TOGETHER

Put stories into the world and adapt.

Plan to:

- Test and iterate
- Listen and learn
- Measure what matters
- Strengthen community story power

OUR NEXT ACTIONS

NARRATIVE HEALTH CHECK



How healthy is the current narrative on our issue?

Our values are reflected in the public story.

☐ ☐ ☐ ☐ ☐

People most affected are at the center of the story.

☐ ☐ ☐ ☐ ☐

Our stories are hopeful and solutions-oriented.

☐ ☐ ☐ ☐ ☐

Our stories are trusted and believable.

☐ ☐ ☐ ☐ ☐

1 = Not at all 3 = Somewhat 5 = Absolutely

STORY QUESTIONS



- ➔ Who benefits from the current story?
_____ Who benefits from the current story? _____
- ➔ Who gets harmed by the current story?

- ➔ What's missing from the conversation?

- ➔ What story do we want people to believe instead?

OUR NORTH STAR STORY



STORIES SHAPE CULTURE. CULTURE SHAPES SYSTEMS.
LET'S TELL STORIES THAT BUILD THE WORLD WE WANT.



TIPS TO REMEMBER

Start with listening.
Center people and lived experience.
Be authentic, consistent, and creative.

Frame solutions, not just problems.
Small stories create big shifts.

OUR GOAL:

Identify and understand the different audiences related to your issue so you can communicate better and influence what matters.

AUDIENCE SEGMENTATION MATRIX

Know your audiences. Speak their language. Build real influence.

Use this matrix to identify and analyze the key audiences relevant to your issue. Segmenting helps you tailor your message, strategy, and engagement.

INFLUENCE / POWER LEVEL (P)

★ LOW

Little to no influence on decisions.

★★ MEDIUM

Some influence or opinion. Can support or block.

★★★ HIGH

Strong influence on decisions and outcomes.

INTEREST / ENGAGEMENT LEVEL (I)

● LOW

Not very interested or aware.

● MEDIUM

Some interest or engagement potential.

● HIGH

Highly interested, impacted, or already engaged.

AUDIENCE Who is this group?	DESCRIPTION Who are they? What is their role?	INTEREST / ENGAGEMENT (I) Low / Med / High	INFLUENCE / POWER (P) 1 (Low) - 3 (High)	ATTITUDES & BELIEFS What do they think about the issue?	NEEDS & CONCERNS What matters to them most?	HOW WE CAN ENGAGE THEM Best ways to reach and involve them.
		● ● ●	★ ★ ★			
		● ● ●	★ ★ ★			
		● ● ●	★ ★ ★			
		● ● ●	★ ★ ★			
		● ● ●	★ ★ ★			
		● ● ●	★ ★ ★			

AUDIENCE EXAMPLES



Use this list as inspiration!

Decision-makers / Government officials
Community leaders / Local influencers
Youth / Students
Affected communities
General public
Media / Journalists
Private sector / Businesses
Civil society organizations
Donors / Funders
International actors
Opponents / Critics



Add any other audience relevant to your issue!

REFLECTION



→ Which audiences are most important to achieve your goal?

→ Which audiences can help you the most?

→ Which audiences could create challenges or resistance?

→ Which audience do you know the least about and need to learn more?

KEY TAKEAWAYS



Who are your top 3 priority audiences?

- 1
- 2
- 3



What is the key message that each of these groups needs to hear?



What action do you want each audience to take?



THE BETTER YOU KNOW YOUR AUDIENCES, THE STRONGER YOUR STRATEGY.



OUR GOAL:

Communicate in ways that de-escalate tension, build understanding, and drive real change.



ESCALATION LADDER for Communications

Choose the right approach. At the right time. For the right impact.

Use this ladder to decide how to communicate or respond as a situation becomes more tense or complex.

HOW TO USE THIS LADDER

- Start at the bottom.
- Use the lowest step that fits the situation.
- Move up only if needed.
- Always try to de-escalate when possible.
- Adapt to your context and audience.



REMEMBER



The goal is not to "win" the argument.

The goal is to create understanding, open doors, and build the change you want to see.

7

SEPARATION

Goal: Protect & Exit

Separate from the situation or disconnect completely.

Examples:

- Walk away
- End the conversation
- Leave the space
- Stop engaging



6

HOSTILITY

Goal: Set Boundaries & De-escalate Tension

Strong disagreement and hostile communication.

Examples:

- Call out harmful behavior
- Set clear boundaries
- Use third-party mediation
- Pause and cool down



5

ENEMY IMAGES

Goal: Reframe and Humanize

Sides see each other as "us" vs "them".

Examples:

- Share stories
- Highlight shared values
- Challenge stereotypes



4

PARTIES STOP TALKING

Goal: Reconnect and Listen

Communication breaks down. No one feels heard.

What to do?

- Call out harmful behavior
- Set clear boundaries
- Use third-party mediation
- Pause and cool down



3

MORE PROBLEMS

Goal: Address Issues

More issues surface. Tension is rising.

What to do?

- Acknowledge the issue
- Provide facts and context
- Find common ground
- Invite dialogue



2

BLAMING

Goal: Set Boundaries & De-escalate Tension

Blame, criticism, or negative language appears.

What to do?

- Stay calm
- Clarify misunderstandings
- Redirect to solutions



1

DISAGREEMENT

Goal: Understand and Build Respect

Differences exist, but communication is open.

What to do?

- Listen with respect
- Share your perspective
- Find common values
- Keep the conversation open



THE SITUATION ESCALATES
WHAT HAPPENS?
WHAT CAN YOU DO?

YOUR SITUATION



Describe the issue or situation you are facing.

Where are you right now on the Escalation Ladder?



CHECK YOUR APPROACH



Before you act, check:

- ☐ Am I trying to understand or just to win?
- ☐ Am I respecting the other person?
- ☐ Am I using language that opens doors?
- ☐ Am I helping de-escalate the situation?
- ☐ Am I focusing on the solution?



PRO TIP

The lower you can stay on the ladder, the more powerful your impact will be.



THE BEST COMMUNICATORS DON'T JUST SPEAK.
THEY LISTEN, CONNECT, AND CREATE CHANGE.





OUR GOAL:

Turn awareness into action and build a movement of leaders.



MOBILIZATION FUNNEL

TURN ATTENTION INTO ACTION.

Use this funnel to move people from simply knowing about your cause to becoming active leaders in your movement.



EXAMPLES



- Instagram
- TikTok
- Press
- Friends
- Memes / Digital content



- Follow your page
- Watch videos
- Read stories
- Visit your website
- Attend online events



- Comment
- Share posts
- Attend an event
- Join WhatsApp/Discord
- Sign a petition



- Volunteer
- Protest / Rally
- Contact officials
- Donate
- Take collective action



- Lead a team
- Recruit volunteers
- Facilitate workshops
- Organize campaigns
- Mentor others

1

AWARENESS

How people will discover your issue?



MAKE IT YOURS!

Name your funnel:

What is the ultimate impact you want to achieve?

2



INTEREST

How will you keep them interested?

3

ENGAGEMENT

How will they participate?



Make each step clear and easy to take.



Remove barriers and reduce friction.



Communicate differently at each stage.

4



MOBILIZATION

What action should they take?

5

LEADERSHIP

How will you empower them to lead?



Measure and learn what moves people forward.

REFLECTION

Where are people getting stuck in your funnel?

- | | |
|-------------------------------------|---------------------------------------|
| ☐ Awareness | ☐ Mobilization |
| ☐ Interest | ☐ Leadership |
| ☐ Engagement | |

What's one thing you can do to help more people move to the next stage?



QUICK CHECK

Is your funnel...



- ☐ Simple and easy to understand?
- ☐ Aligned with your audience's needs?
- ☐ Inclusive and accessible?
- ☐ Measurable at each stage?
- ☐ Designed to build long-term leaders?



OUR GOAL:

Design a strategic digital campaign that reaches the right people, sparks action, and creates real impact.



DIGITAL CAMPAIGN PLANNING CANVAS

PLAN SMART. COMMUNICATE IMPACT. DRIVE CHANGE.

Use this canvas to plan every key part of your digital campaign in one place.

1 CAMPAIGN BASICS



Campaign Name: _____

What issue are you addressing?

Why does it matter?

2 GOALS OR OBJECTIVES



What do you want to achieve?
(Be specific and measurable)

- _____
- _____
- _____

3 TARGET AUDIENCE



Who are you trying to reach?

What do they care about?

Where do they spend time online?

KEY MESSAGE

What is the main message of your campaign?

How will it make people feel?

What do you want them to do?

5 VALUE PROPOSITION



Why should people care and take action?

6 CONTENT STRATEGY



What types of content will you create?

- | | |
|--|--|
| ☐ Videos | ☐ Blog / Articles |
| ☐ Images / Graphics | ☐ Live Sessions |
| ☐ Stories / Reels | ☐ Other: _____ |

Content pillars / themes:

- _____
- _____
- _____

7 CHANNELS AND PLATFORMS



Where will you share your message?

- | | |
|--------------------------------------|---|
| ☐ Instagram | ☐ Facebook |
| ☐ TikTok | ☐ LinkedIn |
| ☐ X (Twitter) | ☐ Email / Newsletter |
| ☐ Youtube | Other: _____ |

Why these channels?

8 CAMPAIGN TIMELINE



Key phases and milestones

PHASE / MILESTONE

DATE(S)

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

9 ENGAGEMENT & COMMUNITY



How will you engage and involve your community?

How will you encourage people to participate and share?

Who can help amplify your message?

10 SUCCESS METRICS



How will you measure success?

- ☐ Reach / Impressions
Engagement (likes, comments, shares) _____
- ☐ Website visits _____
- ☐ New sign-ups / Subscribers _____
- Actions taken (petitions, donations, etc.) _____
- Other: _____

Target numbers or goals: _____

CAMPAIGN ELEVATOR PITCH

Explain your campaign in one sentence.

Who is it for?

What is the main goal?

What action do you want?



PRE-CAMPAIGN CHECKLIST

- ☐ Clear goals and key message
- ☐ Target audience defined
- ☐ Content plan ready
- ☐ Channels selected
- ☐ Timeline set
- ☐ Success metrics defined
- ☐ Risks identified
- ☐ Team aligned and roles assigned

NOTES & IDEAS





GREAT CAMPAIGNS DON'T HAPPEN BY ACCIDENT.
THEY ARE PLANNED, COLLABORATIVE, AND PEOPLE-CENTERED.



YOU'VE GOT THIS!



V.

LEARN AND ADAPT

*We learn. We grow.
We create more impact.*

This section helps you reflect, learn from experience, and take care of your team as you keep going.

**Reflection today.
Stronger impact tomorrow.**



*Small lessons.
Big changes.
Lasting impact.*

TOOLS IN THIS SECTION



Outcome Harvesting

Capture and celebrate the changes that matter.



Most Significant Change

Discover powerful stories of real impact.



After Action Review

Learn what worked, what to improve.



Wellbeing and Burnout Assessment

Check in, care deeply, sustain your team.

**KEEP LEARNING.
KEEP ADAPTING.
KEEP CHANGING.**
THE WORLD



OBSERVE



ANALYZE



STRATEGIZE



MOBILIZE



LEARN
& ADAPT

OUR GOAL:

Capture and celebrate real changes created by your work. Learn what's working and why it matters.

PROJECT HEALTH DASHBOARD

HOW HEALTHY IS YOUR PROJECT RIGHT NOW?

Capture the real changes your work is creating—intended or unexpected. These stories help you learn, adapt, and communicate your impact.

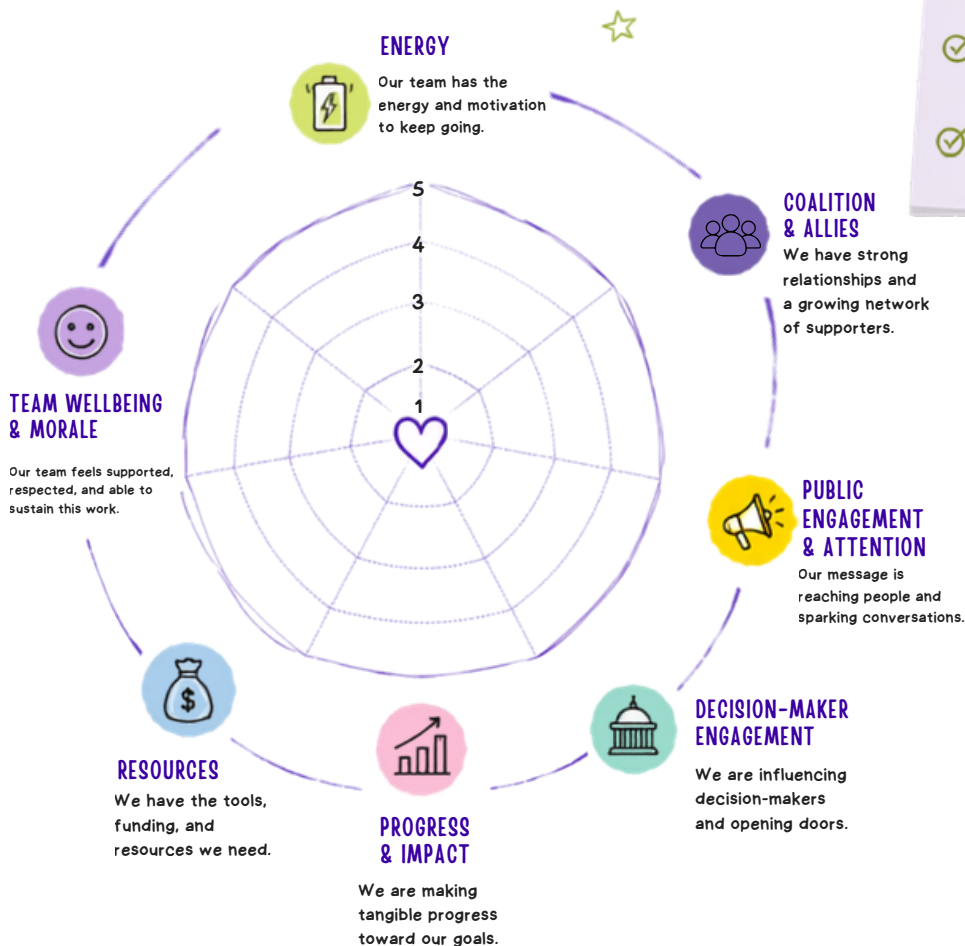
RATE EACH AREA

Rate each area from 1 (Needs Attention) to 5 (Thriving).

	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐

AT-A-GLANCE

Color in the chart to see your overall campaign health.



HOW TO USE:

- ✓ Rate each area from 1 to 5.
- ✓ Color the chart to see your snapshot.
- ✓ Choose your focus and take action!



FOCUS ZONE

Which area scored lowest?
This is where we focus first.

WHY DOES THIS NEED ATTENTION?

-
-
-



ONE ACTION THIS WEEK

What's one small action we can take to improve our focus area?



WHO WILL TAKE THE LEAD?



BY WHEN?



WHAT'S WORKING?

What areas are strong?
What do we want to build on?



Celebrate the wins, learn from the challenges, and keep showing up for the change!



A HEALTHY CAMPAIGN = A SUSTAINABLE MOVEMENT.
CHECK IN, REALIGN, KEEP GOING.

OUR GOAL:

Capture and celebrate real changes created by your work. Learn what's working and why it matters.



OUTCOME HARVESTING

SEE THE CHANGE. SHARE THE IMPACT.



Capture the real changes your work is creating—intended or unexpected. These stories help you learn, adapt, and communicate your impact.

TIP

Use open questions like "What has changed for you?" or "What's different because of

HOW IT WORKS

1



TALK TO PEOPLE

Talk to people involved or affected by your work.

2



ASK WHAT CHANGED

Ask what changes they have experienced or observed.

3



RECORD IT

Record the outcome as an outcome story.

4



REFLECT

Analyze and reflect on what you learned.

5



SHARE & IMPROVE

Use these stories to improve your strategy and showcase impact.

OUTCOME STORY

STORY ID: _____ DATE: _____

WHO SHARED THIS STORY? _____

THEIR ROLE / RELATIONSHIP TO YOUR WORK: _____

1 WHAT HAPPENED?
Describe the change or outcome in their own words.

2 SO WHAT?
Why is this change important? What difference does it make?

3 SO WHAT ELSE?
What are the broader effects or ripple impacts of this change?

4 WHAT CONTRIBUTED?
What do you think contributed to this change?

5 ANYTHING ELSE?
Any additional context, quotes, or reflections?

OUTCOME TYPE (check all that apply)

☐ Knowledge / Awareness	☐ Relationships / Networks
☐ Attitudes / Beliefs	☐ Policies / Systems / Practices
☐ Skills / Capacity	☐ Conditions / Environment
☐ Behavior / Actions	Other: _____

REFLECTION & LEARNING



WHAT IS WORKING WELL?

Why do you think it's working?



WHAT IS NOT WORKING?

What do you need to change?



WHAT WILL YOU DO NEXT?

How will you build on these outcomes?

SHARE YOUR IMPACT

Which outcomes tell the strongest story of your impact?

1 _____

2 _____

3 _____

Where will you share these stories?

- | | |
|---|---|
| ☐ Social media | ☐ Policy advocacy |
| ☐ Reports / Donors | ☐ Website / Newsletter |
| ☐ Community meetings | Other: _____ |

OUTCOME PATTERNS

Look across all your stories. What patterns or trends do you see?

Top 3 outcomes we are most proud of:

1 _____

2 _____

3 _____

Unexpected outcomes:

EXAMPLE OUTCOME STORY (INSPIRATION)

"Before the workshops, I didn't know I could speak at city council. Now I feel confident to share my ideas and they actually listened to me."

Outcome Type: Skills / Capacity, Behavior / Actions



EVERY STORY COUNTS, EVERY CHANGE MATTERS.
KEEP LISTENING, KEEP LEARNING, KEEP LEADING.





OUR GOAL:

Let the people you work with define success in their own words.



MOST SIGNIFICANT CHANGE

DISCOVER THE CHANGE THAT MATTERS MOST.



A participatory way to identify, select and reflect on the changes that are most significant to the people your work is intended to benefit.

1

INTRODUCE & ENGAGE

Introduce MSC to a range of stakeholders and foster interest and commitment to participate.



2

IDENTIFY DOMAINS OF CHANGE

Together with stakeholders, identify broad domains of change (e.g., quality of life, empowerment, livelihoods). Keep them open and flexible.



3

DECIDE HOW OFTEN

Agree on how frequently you will monitor and capture changes in these domains.



4

COLLECT STORIES

Ask those most directly involved a simple question:

"During the last month, what was the most significant change that took place for participants in the program?"

Encourage them to explain why this change is the most significant.



5

SELECT & FILTER STORIES

At each level of governance, review stories from the level below. Select the single most significant story within each domain.

- ✓ Use clear criteria
- ✓ Record the reasons for each selection
- ✓ Send selected stories to the next level



6

FEEDBACK & LEARNING

Share the selected stories and the reasons for selecting them with all stakeholders.

Use feedback to inform the next round of story collection and selection.



7

VERIFY STORIES

Visit the places where the changes happened.

- ✓ Check that stories are accurate and honest
- ✓ Learn more about what happened and what is happening now



8

QUANTIFY RESULTS

Include quantitative and qualitative information in the stories.

Examine how widespread these significant changes are across locations and over time.



9

SECONDARY ANALYSIS

Look deeper:

- ✓ Who participated?
- ✓ What kinds of changes happen most often?
- ✓ How do different groups experience change?



10

REVISE & IMPROVE

Use what you've learned from using MSC and from the analysis to improve both your work and the MSC process itself.



THE OUTCOME:

A collection of authentic stories that highlight the changes that matter most and guide better decisions for greater impact.

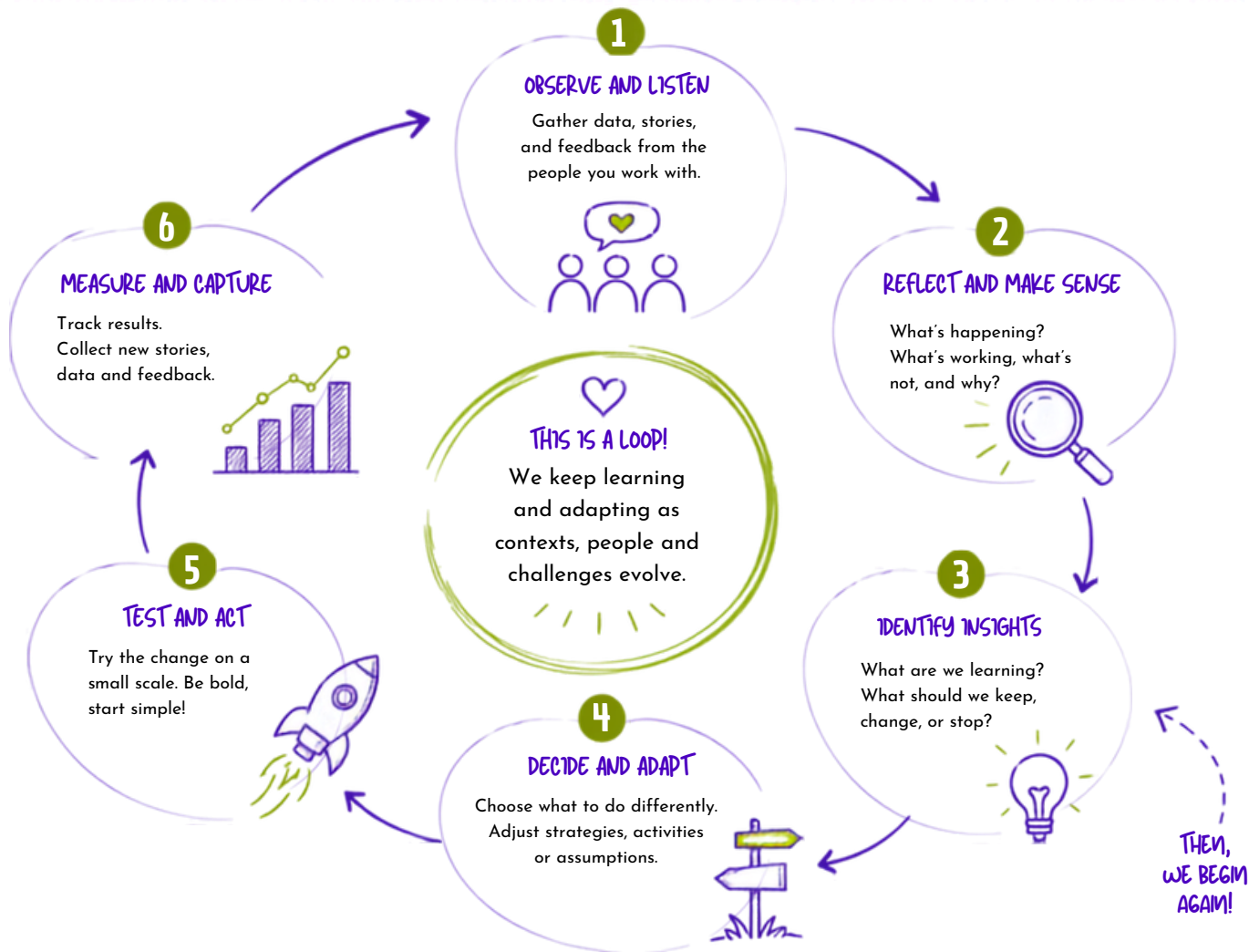


 OUR GOAL:

LEARN. ADAPT. IMPROVE. REPEAT.

TIP

Small changes,
tested often, lead
to big impact over
time.



We pay attention to...

- People's experiences and stories
- Trends, patterns and surprises
- What's working and why
- Challenges and what gets in the way

We are willing to...

- ✔ Question our assumptions
- ✔ Adjust our plans and activities
- ✔ Try new ideas and approaches
- ✔ Let go of what's not working
- ✔ Stay flexible and keep learning

By learning and adapting, we...

-
- WORK THAT IS MORE RELEVANT
- STRONGER RELATIONSHIPS AND TRUST
- BETTER RESULTS FOR PEOPLE
- GREATER IMPACT AND LASTING CHANGE



OUR GOAL:

Capture lessons while they're fresh so we can adapt and do better next time.



AFTER ACTION REVIEW

PAUSE. REFLECT. LEARN. IMPROVE.

A structured conversation to reflect on what happened, why it happened, and what we'll do differently next time.



TIP

Create a safe space. Be honest, respectful and curious. Focus on learning, not blaming.



HOW IT WORKS

1



SET THE STAGE

Define the purpose, timeline, and who will participate.

2



REVIEW THE FACTS

Agree on what actually happened.

3



ANALYZE & REFLECT

Explore what went well, what didn't, and why.

4



CAPTURE LESSONS

Identify key takeaways and recommendations.

5



DECIDE & ACT

Agree on actions, owners, and timelines.

1. THE BASICS



WHAT DID WE DO?



WHEN & WHERE DID IT HAPPEN?



WHO WAS INVOLVED?



WHAT WERE WE TRYING TO ACHIEVE?

2. THE FACTS

What actually happened?
List the key events or milestones.

3. WHAT WENT WELL?

What worked really well?
What are we proud of?



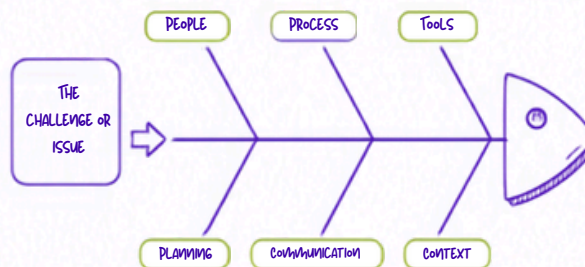
4. WHAT DIDN'T GO WELL?

What challenges or problems did we face? What didn't go as planned?



5. WHY?

Why do you think these things happened? Dig into the root causes.



6. KEY LESSONS

What are the most important lessons we learned?

1 _____

2 _____

3 _____

7. WHAT WILL WE DO DIFFERENTLY NEXT TIME?

What actions will we take based on these lessons?



OUR GOAL:

Sustainable changemakers start with sustainable mindsets, habits and support systems. 

WELLBEING & BURNOUT ASSESSMENT



TIP

Check in with yourself regularly, not just when you feel overwhelmed. Prevention is powerful. 

**TAKE CARE OF YOURSELF.
YOU CAN'T POUR FROM AN EMPTY CUP** 

A simple self-check to recognize your wellbeing, prevent burnout and take action.

1. HOW ARE YOU DOING?

Rate yourself in each area from 1 (Struggling) to 5 (Thriving). Be honest. This is just for you.



MENTAL

I feel calm, focused and able to think clearly.

1 2 3 4 5



PHYSICAL

I have energy, am sleeping well and taking care of my body.

1 2 3 4 5



EMOTIONAL

I feel able to manage stress and my emotions.

1 2 3 4 5



SOCIAL

I feel connected and supported by people I trust.

1 2 3 4 5



PURPOSE

My work feels meaningful and aligned with my values.

1 2 3 4 5



WORK BALANCE

I have boundaries and time to rest, disconnect and do what I enjoy.

1 2 3 4 5



GROWTH

I feel motivated, learning and growing.

1 2 3 4 5

2. CHECK YOUR LEVEL

Add up your total score (out of 35).



29 - 35 THRIVING

You're doing well! Keep doing what works and stay consistent.

20 - 28 MANAGEABLE

You're holding up, but there are areas to nourish. Small changes can make a big difference.

10 - 19 AT RISK

You're running on empty. Prioritize rest, support and boundaries.

BELOW 10 BURNOUT ZONE

Your wellbeing is in danger. It's time to pause and seek support.

TOTAL SCORE:

3. SIGNS OF BURNOUT

Check any that feel true for you.

- ☐ Constant fatigue, no matter how much I rest
- ☐ Feeling cynical or disconnected
- ☐ Decreased motivation or sense of purpose
- ☐ Irritability or feeling easily overwhelmed
- ☐ Trouble concentrating or making decisions
- ☐ Physical symptoms (headaches, tension, stomach issues)
- ☐ Withdrawing from people and activities
- ☐ Feeling like my work is never enough
- ☐ I don't have time for myself – ever



If you checked 3 or more, it may be time to take action. You matter. Your wellbeing matters.

4. WHAT GIVES YOU ENERGY?

List the activities, people or things that recharge and inspire you.



Make time for what fuels you without guilt. 

6. MY WELLBEING ACTION PLAN



I WILL START

(Small habits)



I WILL STOP

(Draining habits)



I WILL SEEK SUPPORT FROM

(People / Resources)