

Campaign Prep Toolkit

2019-2020

Great teams start by building a strong sense of shared purpose and assessing the roles and skills their team needs to make their vision become a reality. Use the activities below in your first team meeting to build a solid foundation for your campaign.

If you cannot initially meet as a team, complete the activity individually and find a time to later come together and synthesize your thoughts. You can find this Toolkit on **Crew 2030** by searching “**Campaign Prep Toolkit**” in the search bar on the homepage.

“ *Up to Us really allows us to get creative...and be great messengers of student’s responsibility to hold leadership accountable on the national debt, and to bridge so many students together for social justice!* ”

MORGAN PARHAM,
PENN STATE HARRISBURG



First Things First: Campaign Purpose

At the foundation of every successful campaign are three building blocks: **Vision, Mission and Values.** These three components combine to give your team a guiding star from which to align all your goals, strategy, actions, and ultimately, your sense of purpose. When your team has a clear vision, one that everyone on your team feels ownership over, you will have a constant reference point throughout the competition as to whether you are on the right track. That vision will reignite and re-inspire you to accomplish your goals.

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Create your Vision and Mission Statement

What is a Vision Statement?

Vision? Mission? What's the difference? A vision statement is a goal for the long-term, what you see 5 years, 10 years, 20 years down the line. Vision statements tend to be idealistic or aspirational and describe far-reaching goals.

Vision Statement

Your vision statement is the ideal of what you'd like to see in your community, how you'd like to see things change. When creating your vision statement there are no right or wrong answers.

No impossibilities. This means dream big and be detailed about what your vision entails.

Some examples of vision statements include:

- ➔ **Oxfam:** A just world without poverty
- ➔ **Make-A-Wish:** Our vision is that people everywhere share the power of a wish.
- ➔ **Amnesty International:** We envision a world in which every person enjoys all of the human rights enshrined in the Universal Declaration of Human Rights and other international human rights instruments.

Mission Statement

Your mission is what your campaign is aiming to do in the short-term in order to help reach this vision. It is specific and is relevant to the campaign you are planning this year. For example, your team's mission might be "To get 1,000 students mobilized to reach out to their representatives to let them know that the national debt is an issue they care about."

Some examples of nonprofit mission statements include:

- ➔ **ASPCA:** To provide effective means for the prevention of cruelty to animals throughout the United States.
- ➔ **NPR:** To work in partnership with member stations to create a more informed public—one challenged and invigorated by a deeper understanding and appreciation of events, ideas and cultures.
- ➔ **Net Impact:** To mobilize new generations to use their skills and careers to drive transformational social and environmental change.

Exercise 1

Creating a Common Vision

The following is a visioning exercise. If you are with a group, have your team leader read the prompt out loud. If you are completing this as an individual, read along and write your answers in the space below.

Before we dive into the visioning exercise, let's take a step back. Let's take a moment to reflect that you're all here for different reasons, and all possess different talents. Perhaps one team member wants to improve their leadership skills, another wants to gain more experience in event planning, and another wants to flex their media marketing skills. Your team has a unique set talents and abilities from any other team. This is your opportunity to make them shine.

Now, on to the vision exercise: Let's pretend that your Day of Action is happening right before our eyes on your campus. **How has your team set up your activities? What types of materials are displayed for students to learn about the national debt? How are your team members engaging with your student body? How are students reacting to it?**

From what you've learned about the national debt so far, write a few facts below that have really resonated with you so far. **How can you make these facts come to life? Can you create a visual representation of them somehow?**

Exercise 2

Creating a Mission Statement

Your campaign's mission statement is what you do. It is one sentence and describes why your Up to Us campaign exists. It is also used to help guide your team's decisions about priorities, strategies, actions and responsibilities.

Below are some tips to keep in mind as you start working on creating your own mission statement:

Try to fill in the rest of this sentence: Our Up to Us campaign aims to...

- Avoid buzzwords or jargon
- Refer to your common vision for ideas and make sure the mission statement aligns with your long term vision
- The best mission statements are clear, memorable, concise, and inspirational
- Use action words in the mission statement

What is your team's mission statement?

Exercise 3

Identifying Your Campaign Values

Your values pertain to how you want to execute your campaign, engage with others and be known in your campus community. What is the legacy you want to leave behind with your campaign this year? Is critical thinking or nonpartisan dialogue important to you? What about community or respect? You can also speak to specific topics such as the national debt or being a civically engaged college student.

What are your team's values?

Here is an example of how one team went through the steps:

➔ Vision

A campus community which engages in dialogue about the national debt and takes action on and off campus to hold their leaders accountable to real solutions. A generation that feels empowered to speak its mind and lead by example.

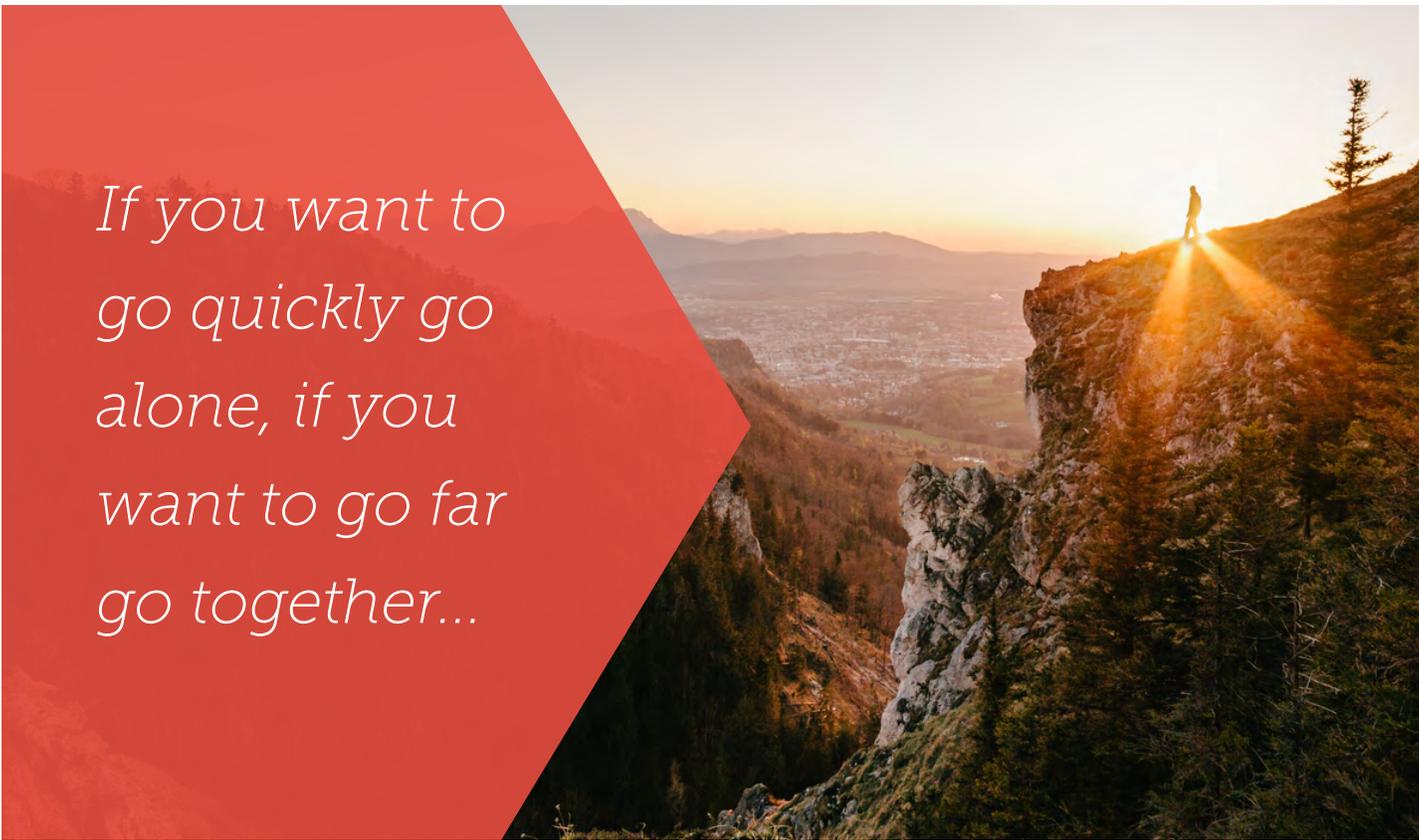
➔ Mission

To raise awareness with students on our campus about the cause and solutions to the national debt, and to execute creative strategies to demonstrate to our leaders that Millennials care about this issue.

➔ Values

Critical thinking, innovation, education, respect, community.

This section of the toolkit is a good touchstone for you to refer back to as you go through the competition. It is important to set check-ins every few weeks to ensure what you are doing is still aligned with the vision, mission and image of success you originally created.

A photograph of a person standing on a rocky cliff edge at sunset. The sun is low on the horizon, creating a bright glow and long shadows. The person is silhouetted against the light. In the background, a valley with a town and mountains is visible. The image is partially covered by a red geometric shape on the left side.

*If you want to
go quickly go
alone, if you
want to go far
go together...*

Team Planning

The exercises below will help your team establish expectations and define each team member's role based off their individual interests. Encourage each team member to be transparent in the amount of time they are able to dedicate to Up to Us this semester. This information will be critical in defining roles and future tasks.

Your Team

If you want to go quickly go alone, if you want to go far go together...this speaks to the importance of developing a core leadership team, one that has clearly defined roles, responsibilities and ways in which team members are expected to engage with one another.

Your team will make or break your campaign's ability to have a far reach, to execute an event and to have a lasting impact on your campus community. A strong team has members with a diversity of skills and interests who are all inspired and committed to the same vision. This is what keeps the team united in working towards its goals.

Team Agreements

Creating team agreements means establishing guidelines the team creates together for each person to uphold throughout the campaign. This process is essential for building a strong and effective team and creates an environment where each team member has the opportunity to be heard and contribute.

- Establish explicit expectations
- Facilitate interpersonal communication
- Provide an objective reference point for feedback
- Establish the team's culture



Exercise 4

Creating Team Agreements

As a team, create a list of agreements or guidelines for how you plan on working together that you think will help you establish an effective team. Here are some guidelines for how to set agreements:

1. As a group, get together to brainstorm guidelines/agreements for the group
2. Have everyone write each guideline/ agreement they think of on a post-it
3. After everyone has written up their guidelines/agreements, have them post them to the wall
4. Group similar post-its together
5. Discuss as a group any guidelines/ agreements that were written that are unclear or confusing
6. Come up with a list of agreements based off of those that all team members agree to

Example team agreements

- ➔ **Respect** (no checking phones while others talk, no interrupting, etc.)
- ➔ **Listen to understand, not to respond**
- ➔ **Decisions will be made by a consensus**, but majority will rule if timely consensus is not reached

Your turn

Now that you have your list, look it over and think: Do your guidelines allow your team to be present, authentic, inclusive and responsive? If so, you're good to go! If not, how can you adjust your list to make sure that it is more inclusive?

Next, share the agreements as a team and ensure you will have a way to access said rules during team meetings so you can hold each other accountable. It is a good idea to revisit your team agreements periodically through the competition to remind your team of the commitments you set, as well as amend the list.

Meetings

Throughout the campaign, there will be weekly webinars where competition organizers, Up to Us alumni, and special guests will share important information about how to lead a successful campaign. Your team will also want to meet regularly to discuss short-term action items, progress reports, and long-term goals. Meetings are the perfect place to build your team's culture and put into action the team agreements you created.

Here are some helpful HINTS for running your meetings

- Have an agenda (topics, time expectations, moderator, note taker).
- Listen to each other (don't be "that team member" that monopolizes discussions!)
- Conclude with action items for each member and have progress reports on those actions.
- Record challenges, successes, and lessons learned as they arise.
- Rotate who leads team meetings and who takes notes.
- Have fun! Meet in a relaxing area, have a beer (if you're 21), enjoy your team!

“After working with my team and Up to Us I feel confident in my ability to follow through with a given task while also managing other priorities during the school year.”

JORDAN KENNY,
SAN FRANCISCO STATE UNIVERSITY

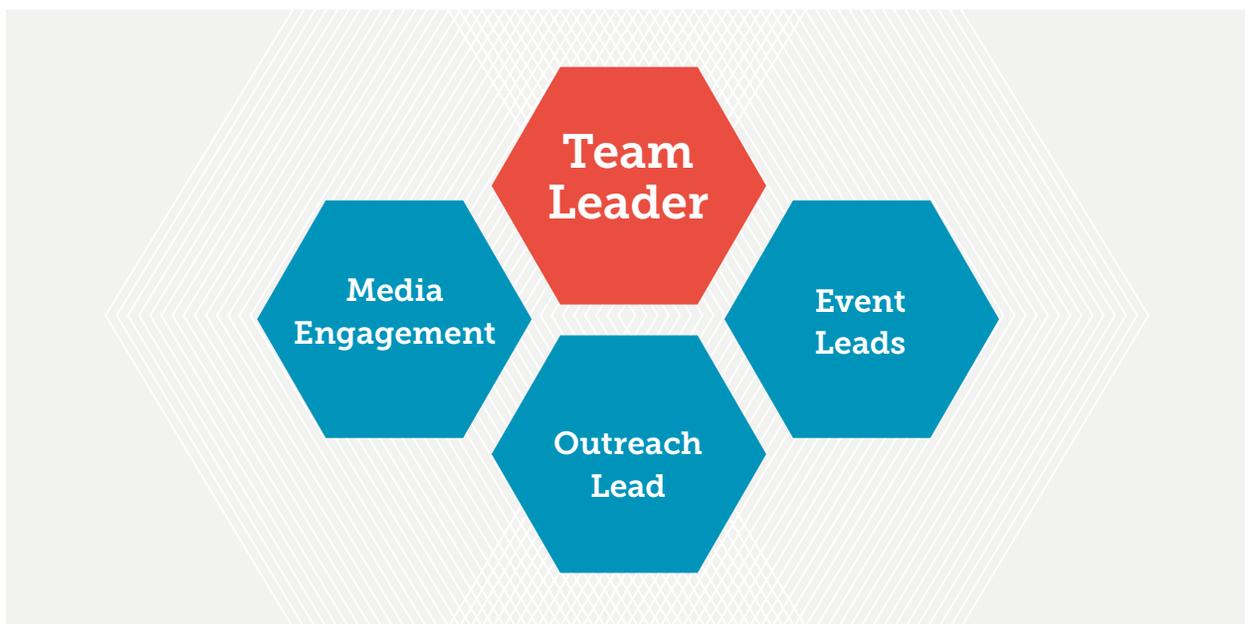


Team Structures

The most successful campaigns have organized teams with each team member having a clearly-defined role, responsibility and accountability. Below is an example of how a team could be organized.

Example

- ➔ **Team Leader** oversees the Campus Campaign Plan development and high level organizing, ensures that team members are engaged and motivated over course of campaign.
- ➔ **Media Engagement** manages social media and coordinates campus/local media coverage on campus tabling.
- ➔ **Outreach Lead** seeks out and maintains relationships with partnering clubs, faculty, or off-campus speakers.
- ➔ **Event Leads** oversee the planning and execution of the team's wildcard, including sourcing participants and working with the administration.



Think about your team...your skills, your available time, your interests, how you all communicate best. Next, reflect back to your vision, your mission and what a successful Up to Us campaign means to you. Use this information to decide what team structure will work best for you.

Roles and Responsibilities

In order to function as a team and ensure each person feels connected to the mission and that they are contributing to reaching the vision, clearly defined roles and responsibilities are a must-have. A great way to approach this is to list the following as it pertains to each of your team members individually:

- ➔ **Interests**
- ➔ **Passions**
- ➔ **Skills**
- ➔ **Available time**
- ➔ **Best way to communicate (i.e., email, text message, FB message)**

After you have each answered these bullet-points, share what you wrote as a group so everyone is on the same page.

“ My overall experience with Up to Us was amazing and I learned a lot of valuable information about the national debt and career skills I can use in future positions. ”

JORDAN KENNY,
SAN FRANCISCO STATE UNIVERSITY



Team Goals

Having your goals as a team will allow you to more clearly define who is responsible for what and by when. The final step of your strategic planning session is to take your roles and responsibilities and goals to each create your own “action plan” that outlines in as much detail, each action each team member is responsible for and by when.

Exercise 5

SWOT: Strengths, Weaknesses, Opportunities, Threats

A SWOT analysis is a planning method used by businesses and individuals to determine the landscape for achieving a goal by identifying strengths, weaknesses, opportunities, and threats. SWOT analysis is important because it can inform decisions for planning to achieve a campaign objective. By critically thinking about what strengths and weakness you have as a team, as well as what opportunities you can leverage or road bumps to be wary of, you will be much more effective in your planning process. Doing a SWOT analysis allows your team to be as strategic and efficient as you can with your plans since it helps you see what to take advantage of and where you might need a backup plan.

As a team, go through this worksheet and fill out each section in as much detail as possible. A description of each category is below, and examples for each area are provided in the **SWOT matrix**.

- ➔ **Strengths:** characteristics of your team that give it a relative advantage
- ➔ **Weaknesses:** characteristics that place your team at a relative disadvantage
- ➔ **Opportunities:** elements in the environment that the team can use to its advantage
- ➔ **Threats:** elements in the environment that could be harmful to the team

HELPFUL TIP

Keep referring to your team’s vision and mission during this process. It will help guide you to think critically about where your strengths and weaknesses lie in relation to achieving your mission.

Internal Origin (your team has control over these factors)	Helpful	Harmful
	<p>Strengths Example: Committed leadership team</p> <hr/>	<p>Weaknesses Example: Unfamiliar with how to run an event</p> <hr/>
External Origin (the factors from the environment, your team does not have control)	<p>Opportunities Example: Student Life has expressed interest in partnering with us on an event</p> <hr/>	<p>Threats Example: Snow days</p> <hr/>



For more information
or to sign-up today,
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