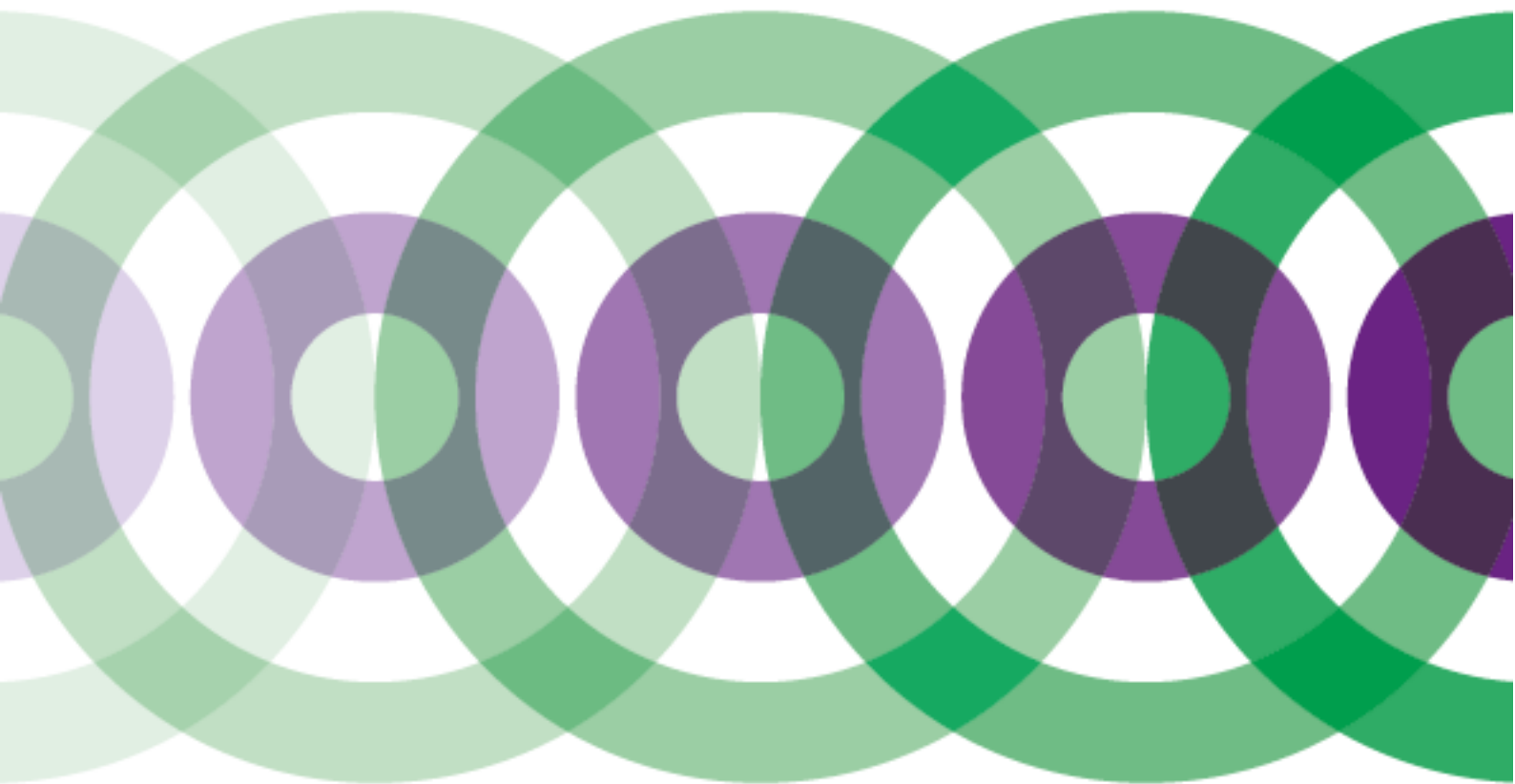


Organising to win

Five phase plan – template and guide



UNISON defines strategic organising as building member participation within an escalating plan to achieve a specific win. It is reserved for times when negotiation alone will not deliver the positive changes members need, and we need to build pressure on those making the decisions, to get them to say yes when they would rather say no.

Strategic organising must have a strong equalities dimension. Activity and aims should tackle workplace discrimination and increase participation from groups currently underrepresented in UNISON activism. Strategic organising must not reinforce or extend existing inequalities.

The following template sets out the necessary stages of an effective 'plan to win'.

How this template can be used

This template can be used as a living document that is updated throughout the campaign. At the start of the campaign, the full template can be completed (for the final phases, this may involve more hypotheticals and few details). The template can then be consulted regularly and updated at any significant campaign moment, such as when preparing for the transition from one phase to the next, or when a move from the target decision maker requires a significant change in strategy.

The structure of campaigns will vary according to the organising situation, the template and the targets within it may be completed by the whole organising team together, rather than by the organising lead alone. This can generate shared buy-in to strategy and targets by the whole team on the campaign. These strategy development sessions take time but are a solid investment in the campaign's future success. As workplace leaders are identified and developed, they can use their workplace knowledge to improve and take co-ownership of the plan.

You may prefer to use the online Word template which you can download and edit. It can be found [here](#).



Or scan this QR Code for all the Organising to Win guides.

Campaign title

Brief description

Campaign team / organising committee (must include members of targeted areas and under-represented groups):

Goals (including stronger, more powerful union and material gain for members)

Organising baseline (pre campaign membership & activist levels and participation)

Organising targets (SMART)

Initial SWOT (to inform planning)

Strengths

Weaknesses

Opportunities

Threats

Five phase plan

Each phase of campaign planning should be reviewed against the following:

- Does the strategy build the power to move the decision-makers to do something that they would not otherwise do (and achieve the win)?
- Do the tactics require large scale member participation?
- How will the campaign increase membership recruitment, retention and density?
- How will the campaign identify and recruit new workplace activists and leaders?
- How will the campaign develop workplace activists and leaders?
- How will the campaign tackle workplace discrimination and increase participation from groups currently underrepresented in activist and leadership roles?

For larger campaigns consideration should be given to establishing a peer review panel as a “critical friend” to regularly review plans and evaluate activity.

Phase 1 – Research and development

Aim

The purpose of phase 1 is to define available resources and build internal organising capacity; build understanding of the sector / occupational groups; determine the commissioning and regulatory environment; identify key decision-makers and their primary self-interest and influencers, identify opportunities to influence and leverage change; establish current and potential industrial and organising strength and weakness. This analysis will be used to define goals, establish strategy and map out a campaign plan with associated tasks and tactics. Adequate resourcing for success must be confirmed at this stage.

By the end of phase 1, you should know:

1. What do we want? (goal)
2. Who can give us what we want? (decision maker)
3. Who or what will make them? (levers)
4. What capacity do we have/need? (resource)

External research / sectoral / power

Objective	Task	Responsibility	Deadline
Goal 1: research primary decision maker(s) and any potential leverage we have over them.	<p>Research may include ownership structures; governance structures; profits; executive pay; organisational history; organisational goals; etc.</p> <p>Potential leverage may include industrial pressure; reputational damage to the institution; reputational damage to the decision makers; political pressure; service user pressure; public pressure; high levels of inconvenience, etc.</p>		
Goal 1: research secondary decision makers (those who exert key influence over the primary decision maker) and any potential leverage we have over them.			
(As above for any additional goals with different decision makers)			
Research any potential external allies who may support our campaign or opponents who may actively oppose it.	Analyse their influence over the decision maker(s) so that we can aim to bring influential allies on board and limit the power of any influential opponents.		
Sectoral research	Identify if there are any wider sectoral norms or pressures relating to your goals.		

Internal research / member mapping

Objective	Task	Responsibility	Deadline
Mapping	Strategic organising campaigns will require a Level 3 map (as per the Organising to Win Mapping and Charting Your Workplace Guide) which has a sheet listing participation of all relevant works (with activist and leaders clearly marked) and a connected sheet listing participation within all relevant workplaces/departments.		

Campaign development and resourcing

Objective	Task	Responsibility	Deadline
Determine organising team capacity	List the weekly hours available of each member of your organising team If necessary develop plans to grow your organising team		
Organising team campaign meetings scheduled	Determine how regularly your organising team will meet to review progress against this plan (maintaining the momentum to win a strategic organising campaign may require a weekly organising team meeting).		

Phase 2 – Base building

Aim

The purpose of phase 2 is to launch pre-campaign organising activity to identify / confirm organising issues and increase membership and activism, to build the union base from which the campaign can be confidently launched. The exact focus of phase 2 will depend on the outcome of phase 1. Depending on the campaign, phase 2 may be subdivided into a general phase of outreach across a sector or employer/s followed by a targeted phase, focused on specific employer/s, worksites and organising issue, in preparation for phase 3.

Base building organising activity

Objective	Task	Responsibility	Deadline

Union organising often ends at phase 2 – with marginal increases in membership and activism and often with some bargaining gains – but without transformative changes to density, participation or activism - or significant material gain for members.

Phase 3 – Issue campaign/s launch and escalate

Aim

The purpose of phase 3 is to launch a strategic and winnable issue-based campaign or campaigns to deliver genuine material change for members. This could be locally within a target group or workplace, across an employer or across a locality, region or nation. During the campaign membership should increase significantly with the goal of majority density. The plan to win should be clear, credible and have the confidence of the membership. It must be developed in a way that requires member participation for success which will in turn enable ongoing activist identification and development. The campaign is likely to also require public facing activity that is external to the workplace, to influence and persuade decision makers through targeted, multi-directional pressure. It is vital that members understand and have confidence in the ‘plan to win’. The exact focus of phase 3 will depend upon outcomes of phase 2.

Issue campaign/s launch and escalate

Objective	Task	Responsibility	Deadline

Phase 4 – resolve the issue or create a crisis for the employer / decision maker!

Aim

If the issue can be resolved at phase 3 then it should be done in a way that maximises organising outcomes before proceeding to phase 5. Otherwise the purpose of phase 4 – having failed to secure a satisfactory resolution at an earlier stage – is to escalate the campaign both inside and outside the workplace and bring multiple pressures to bear simultaneously until they create a crisis for the decision maker which exceeds the cost of settling the dispute. Stage 4 should not be reached without prior discussion and agreement with your relevant regional centre. The strategy and tactics will be planned and developed based on phase 3 progress, scale of target and ambition of campaign aims – but success will require a plan of escalating action – to test and build the participation and resolve of members while incrementally increasing pressure on the employer / decision maker.

It should always be assumed that strike action alone will not be sufficient to win the goals of a strategic organising campaign. Wider leverage will usually be required to win. External research from Phase 1 on leverage points on primary and secondary decision makers should be consulted to inform Phase 4 plans to create a crisis.

Resolve the issue or create crisis

Objective	Task	Responsibility	Deadline

Phase 5 – win, celebrate, review and sustain

Aim

The purpose of phase 5 is to achieve objectives and win the campaign, promote and celebrate the win and ensure sustainability of membership, organisation, activism, participation and confidence. A thorough review of key lessons and future recommendations must be undertaken so we have data to inform future organising strategies. Details of any win should be sent to WIN@unison.co.uk to draw it to the attention of the national Strategic Organising Unit and national communications team.

Win, celebrate, review and sustain

Objective	Task	Responsibility	Deadline

Organising to Win resources

Ultimately all organising is a set of tools and techniques deployed to shift the balance of power in favour of our members. How those tools are deployed will vary in different circumstances but generally the fundamentals remain the same.

Our Organising to Win webinars and resource library provide a growing set of organising guides including:

- Organising conversations
- Leader identification and activist recruitment
- Workplace mapping and charting
- The organising and equality impact assessment template and guide
- The five phase plan to win template and guide (Strategic organising)

This guide is one of many key organising resources in the Organising to Win series. UNISON activists and staff can access all resources at:

The Organising Space

UNISON's online platform for activists. Visit the Organising to Win tile at organisingspace.unison.org.uk

Pearl

The UNISON staff intranet. Visit the [Organising to Win](#) page.

Had an organising win?

Send a summary of it to win@unison.co.uk