



Explore Tactics

Exercise: Developing a Strategic Path

Methodology:

This activity will help your group to apply Sun Tzu's three sources of knowledge to identify strategy and tactics for moving a specific issue forward. Your group will utilize the information gathered through the previous steps and prepare a "strategic path" in preparation for developing a concrete plan of action. The "strategic path" exercise provides the opportunity for the group to:

- ✓ Review the problem statement and vision.
- ✓ Identify a **SMART goal** regarding the problem in order to develop strategy.
- ✓ Re-examine identified targets and tactics as these relate to the specific goal.
- ✓ Identify potential allies for building a more comprehensive and effective strategy to move the specific goal forward.

Objectives:

1. Apply Sun Tzu's three sources of knowledge to develop strategy and tactics.
2. Select a specific goal for the identified problem. (NOTE: this may require a further revision of the problem statement.)
3. Develop a strategy to reach the specific goal (see "Developing a Strategic Path" visual).
 - ✓ Review selected targets and tactics on the tactical map and spectrum of allies according to the specific goal.
 - ✓ Confirm key targets for reaching the specific goal.
 - ✓ Select appropriate tactics to move targets ONE segment toward the direction of "active allies" on the spectrum to reach the specific goal.

Getting Ready:

This exercise will take 1 hour. In order to do this exercise, the group will need to have completed

- 1) Problem Statement
- 2) Vision Statement
- 3) Tactical map (see Exercise to Define the Terrain Using the Tactical Map Tool), and
- 4) Spectrum of Allies (see Exercise to Identifying Allies – Spectrum of Allies Tool).

The group will need the two worksheets: 1) "**Strategy & Tactic Summary Sheet**" and 2) "**Identifying Targets and Tactics to Move SMART Goal Forward**". Provide the group with large sheets of flip-

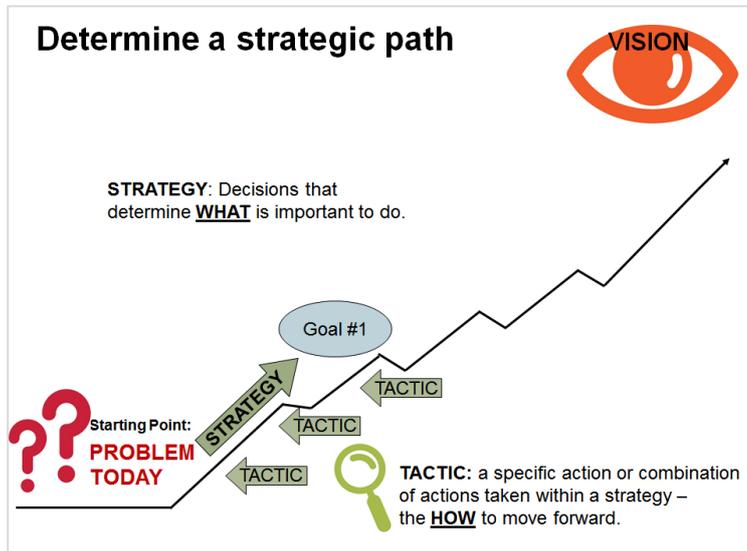


chart paper, newsprint, or construction paper; markers or crayons; masking tape. You will need a large table, floor space or wall to display the completed worksheet information for sharing with the full group.

Facilitation Note:

It is very helpful to demonstrate the “Strategic Path” using an advocacy example. (NOTE: the example provided below utilizes an issue related to the rights of people with disabilities).

- Before starting this task, it can be helpful to prepare the group by asking them to take 2 minutes of silence to reflect on what they hope to be doing 10 years from now:
 - Ask for people to share.
 - Select an example that can highlight steps someone might need to take in order to reach that 10 year goal (e.g., to be a New York Times journalist)



Explain that while the long-term goal (for 10 years from now) one might have is to be a New York Times journalist, in reality there are many specific actions (goals) that must be taken in order to start down the path that will one day lead to this becoming a reality. For example, the first step/goal may be starting a blog, or writing an opinion piece for a local newspaper. The decision regarding which “first step” to take is weighed carefully and determined by resources, potential for future change, and, ultimately, is informed by the long-term goal of being a New York Times journalist.



- After preparing the group for the concept of the series of goals that make up the strategic path, demonstrate the “strategic path” by returning to the mountain illustration (Methodology Step 2) and sharing how this concept can apply to the planning of both personal and advocacy goals.



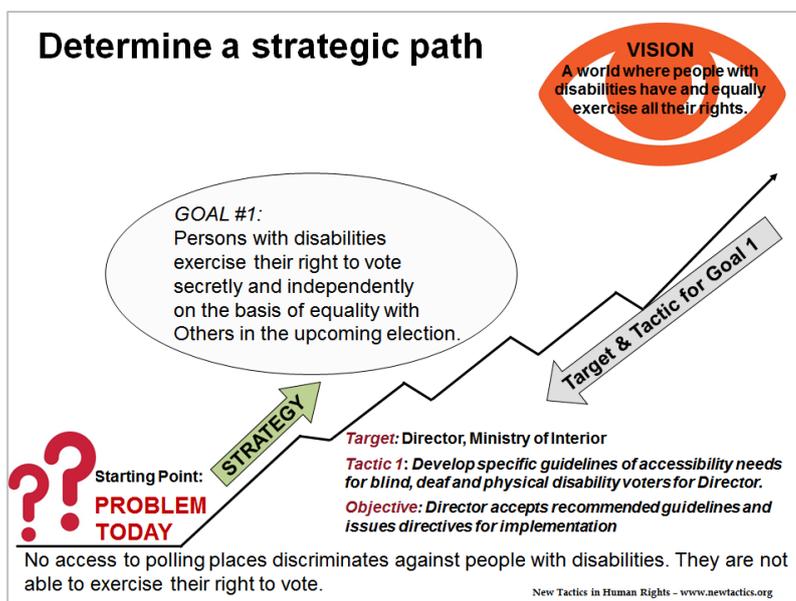
Review with/remind the group of the importance of **re-examining their problem statement** in order to better select a SMART goal that will help the group move toward their vision. Remember: Specific problem statements better focus our attention on the actual part of the issue that we are working to change. (For example, the issue of people with disabilities became more specific to exercising the right to vote).

"SMART" Goals	
S	Specific / Strategic
M	Measurable
A	Achievable
R	Realistic
T	Time bound

NOTE: There are resources on writing SMART goals - use this link for one example from WITNESS: <http://goo.gl/5qoltZ>

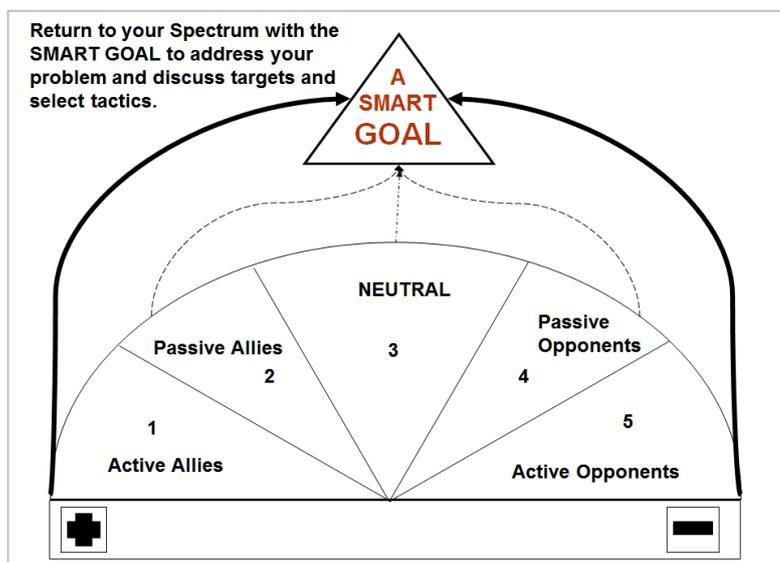
3. Share an example that illustrates how the discussion of the problem statement and a specific goal helped to further refine both the problem and goal (see the example regarding people with disabilities and their right to vote in the illustration above). Using this example (or one of your own), encourage the group to re-visit how they narrowed their problem statement to focus on a specific issue. Instruct the group to think about any new information that may require them to further narrow this focus as they work to identify a specific goal to address this problem.

4. The last step of the strategic path is the identification of a target on which to focus our efforts. In order to identify this target, it is important to review the tactical map and spectrum of allies. For example, use the issue of disabilities to highlight what each group will discuss and develop regarding the identified problem (see the example in the illustration and the identification of the Director, Ministry of Interior).



For this step of the activity, as the facilitator you will also need to illustrate the Spectrum of Allies tool. During this part of the exercise it is important to remind the group of the following:

- The point of action of our goal is to move a target ONE wedge or segment toward the "Active Ally" segment of the spectrum. For example: if the target is currently located in the "Neutral" position, the action is



intended to move the target to the “Passive Allies” position.

- Be sure that every member in the group (or each small group) is involved in assessing and selecting the target for their action.

NOTE: As the facilitator you will need to illustrate the process of target selection using the Spectrum of Allies tool, so it will be helpful to have an example already prepared. In the example, use a marking pen to indicate with an arrow the direction you intend to move a target group on the Spectrum (the arrow should indicate that the target moves just ONE segment closer to the “Active Allies” from its original position, such as selecting a journalist from a “Neutral” position with an arrow toward the “passive Allies” position).

It can be helpful to choose an example of an institution to be targeted. Remind the group that an institution is made up of “people.” You may need more information about the people inside the institution in order to identify the best “target” for action. The tactical map tool can be used again to “map” just the knowledge available from the group about the institution (including the nature of the relationships). This will help the group to understand the true value of both the tactical map tool and the spectrum of allies in helping them to create an effective plan of action.

The Group Exercise Process:

1. **Ask each group to review** their own problem statement and vision; and determine a SMART goal to address their problem. Provide the **Participant Worksheets: Strategy & Tactic Summary Sheet and Identifying Targets and Tactics to Move SMART Goal Forward**. The groups may revise their problem statement again. This is fine. Frame this in positive terms, as this will help them to better identify their SMART goal, target and tactics for moving forward.
 - After the group has filled in all of the information, creating a summary of the work they have done in this workshop, ask them to brainstorm a list of potential first goals for their strategic path. Remind them that it is IMPOSSIBLE to outline all the goals that will get them to their vision, because the terrain and its actors constantly change along the way. Here, the focus is on brainstorming what the best FIRST goal will be.
2. **Monitor and assist the groups during the process.**
 - Once the group has a list of potential “first” goals, ask them to evaluate which is the “most effective” first goal given the information on their summary sheets and the SMART criteria. This should be a critical discussion undertaken by the group. An effective goal is both ACHEIVABLE given the resources and capacity of the group and an action that works to address the problem.
3. **Once a first goal has been decided, the groups will turn to determining the TARGET on which they will focus their efforts in achieving this goal. Here, illustrate for the group the process of target selection, providing an example using the Spectrum of Allies tool:** Share an example of a goal for a specific target. Ask the group to think about how moving that particular target helps to solve the overall human rights problem on which the group is focusing. Ask the group to identify a concrete outcome that would indicate that the target is helping the group move towards its vision (illustrating the **link** between **targets** and **goals**).

New Tactics in Human Rights is a program of **The Center for Victims of Torture**

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Instruct the groups to use both their identified first goal and the Spectrum of Allies tool to determine the target on which they will focus. **Ask them to keep in mind the following questions:**

- How does this target help to achieve the **SMART GOAL**?
- Is this the most effective target on which to focus for achieving the goal? Why or why not?
- Is there another target on the spectrum of allies that you did not immediately think of, but that may have potential for helping elicit the change you seek?

Reflection and Sharing:

It is important to provide opportunities for the group to discuss and explore specific goals. Organizations always have limited resources (financial, people, time). Therefore, it is essential to determine SMART goals (Strategic/Specific, Measurable, Achievable, Realistic/Relevant and Time bound) that can actually impact the problem and move toward the vision.

Ask each group to share why they chose their particular target and tactic(s) to move them toward their SMART goal (and at least a small step toward their vision).

Source: New Tactics adapted the initial concept of the “critical path analysis” from the Change Agency (<http://www.thechangeagency.org/campaigners-toolkit/training-resources/political-analysis/>) in order to provide a process for understanding the need to develop a **strategic path**.

