

The Medical Cannabis Advocate's Handbook

STRATEGIC PLANNING

You've got to think about big things while you're doing small things, so that all the small things go in the right direction." —Alvin Toffler

STRATEGIC PLANNING

Often activists and organizations start projects with a lot of passion, but fail to reach their goals. Sometimes this is because they never stopped to decide what success looks like before beginning their work. In other cases, well-meaning advocates get side-tracked by tangents and on dead-end projects that seem worthwhile, but ultimately do not end in achieving their goal. How do you know what you or your group should be trying to achieve? What are the values that will guide you on the path there? Where are you now and what are the steps along the way? These can be bewildering questions if you do not have a process to think them through systematically. That process is one of the most powerful that an activist or organization can engage in, but it takes time and effort to accomplish. Do not take short cuts on your project by ignoring the crucial process of Strategic Planning.

CREATING A MAP TO REACHING GOALS

Strategic planning involves setting goals and developing an approach to achieving those goals. In this process you define the political landscape in which you are operating, the beliefs and values of your organization, and lay out key bench marks to reach along the way. Development of a strategic plan significantly helps to clarify an organization's plans and ensure that key leaders are all "on the same page".

Management Tool

As with any management tool, strategic planning is used to help an organization do a better job—specifically to focus its energy, to ensure that members of the organization are working toward the same goals, and to assess and adjust the organization's direction in response to a changing environment. In short, strategic planning is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is,

what it does, and why it does it, with a focus on the future

Many community-based nonprofits, including medical cannabis organizations, must often respond to dynamic and even hostile environments. Strategic plans lay out the best way to respond to the circumstances of the organization's environment.

Simply put, strategic planning determines where an organization is going, how it's going to get there, the resources it will need to get there and how it'll know if it got there.

Using the Effective Action Model for Strategic Planning

1. CONTEXT

What is the context of this effort?

- What's the larger frame of reference?
- What's at stake?
- What are the bigger things that this effort is connected to?

2. BELIEFS & VALUES

What are some of your beliefs & values that compel your group to this effort?

- Why is your group putting time and energy into this?
- What is the reason your group is doing this work?
- What do you believe about this effort that compels your group to act?

3. GOALS

What is the goal of this effort?

- What is your group trying to create through this effort?
- What does your group want all this to add up to?
What would 'victory' look like?

4. CONDITIONS & DETERMINORS

What are the conditions and determinors related to reaching your goals?

- What are the conditions your group is working to change?
 - What or who is causing these conditions?
 - What are the conditions you want to retain? Who is affecting them?
 - Who are the 'determinors'—the people who by their action or inaction decide the course of events and determine outcomes?
 - What are the key relationships involved? Where's the money?
- Among determinors, who is potentially susceptible to our actions?

5. STRATEGIES

Given the identified conditions and determinors which you have identified, what strategies will you use to reach your goals?

- What approaches are you going to use?
- What is your group going to do to move key determinors in ways that support your goals?
- How is your group going to change the necessary underlying conditions?
- What is your group going to concentrate on?

6. TACTICS

What tactics might your group use to implement your strategies?

- What specific actions will your group take to implement your strategy?
- What are the particular actions, campaigns, and programs that will carry out your strategy?

7. VEHICLES

What vehicle(s) will you use to carry out your tactics and strategies?

- Who will do the basic operations need to carry out the strategy and tactics?
- How will your group organize yourself to carry this out?
- How will it look in operation? How does your group know it's working to help meet your goals?

8. OBJECTIVES

What are the major objectives which implement your tactics & strategies and contribute towards the goal?

- What are the key milestones or accomplishments on the path to your goal?
- What are the big pieces your group needs to put into place?
- What are the elements needed to create the necessary vehicle?

9. STEPS OR TASKS

What steps or tasks are required to accomplish each objective?

- What steps or tasks are needed to reach your groups objectives?
- What will be done? By when? By whom? In what order should they be done?

10. RESOURCES

What resources are required for each task and the project as a whole?

- What people and money does your group need to complete the project?
- What information, materials, equipment, facilities, etc do you need?

(Adapted from Bryson's Strategic Planning in Public and Nonprofit Organizations)

SAMPLE "EFFECTIVE ACTION" MODEL

The California Highway Patrol Legal Victory—Enhancing patients' rights!

On August 22, 2005, the California Highway Patrol (CHP) amended its policy with regard to how it treats encounters with medical cannabis patients. Many people do not realize that this victory did not happen in a vacuum; it happened with a concerted effort and a well-devised plan of action. This document is meant to be a guide for those wanting to apply "effective action" models for other projects.

Context: First, you want to assess the context within which you're working:

- A high number of patients and caregivers

are still being cited, arrested, and getting their medicine seized regardless of the protections provided by state law

- The CHP was the worst offender of patients' rights in California
- Public support for medical cannabis remains high across the state

Beliefs & Values: Assess what is driving the context above:

- The CHP policy was illegal on its face, according to state law
- Patients do not deserve to have their medicine taken away from them for no apparent reason
- The government, and by extension the CHP, must be accountable to the people and policies be guided by compassion and human rights

Goals: What is it that the project is seeking to accomplish?

- Achieve injunctive and declaratory relief from the CHP and Governor of California, forcing a policy revision that prevents officers from wrongfully seizing patients' medicine
- Establish a consent decree and fees to ensure that the practice of unlawful medical cannabis seizures does not continue
- Utilize a CHP policy change to influence other localities to adopt similar policies

Conditions & Determiners: It is useful to fully understand what things determine effective change, given the conditions that exist.

Conditions & Determiners

CONDITION: Local law enforcement is still resistant to enforcing state law

DETERMINER: CHP, patients, Attorney General, ASA, courts, local government

CONDITION: State courts are both willing and resistant to return medical cannabis (only vehicle patients have to get property returned)

DETERMINER: State courts, patients, public defenders, private attorneys, ASA

CONDITION: CHP as worst violator of state law

DETERMINER: CHP, California Narcotics Officers Association, AG, Governor

CONDITION: Media is fairly sympathetic to the issue and the plight of patients

DETERMINER: Mainstream news outlets, patients, ASA, advocates

CONDITION: Local government is both ready for and resistant to law enforcement policy changes

DETERMINER: ASA, patients, advocates, media, local government

The rest of the sample "effective action" model deals with assessing project strategies and tactics, as well as what vehicles, objectives, tasks, and resources are to be used in accomplishing the goals.

Strategies:

- Assess the extent of harm from CHP policy and gather instances of abuse
- Use litigation to obtain declaratory and injunctive relief
- Use litigation to stop the harassment of patients by law enforcement
- Use top law enforcement agency in the state to trumpet model police policy

Tactics:

- Search for ideal plaintiffs that have been violated by CHP
- File lawsuit against CHP in state court seeking injunctive and declaratory relief
- File preliminary injunction, speeding up the legal process
- Negotiate consent decree and attorneys fees

Vehicles:

- ASA
- Plaintiffs
- Patients and advocates
- Media
- League of California Cities





Objectives:

- Win declaratory and injunctive relief
- Win attorneys fees
- End widespread harassment (citation, arrest, and medicine confiscation) of patients

- Disseminate CHP policy throughout the state, using the League of California Cities and advocates as a vehicle

Steps/Tasks:

- Secure plaintiff group
- File lawsuit in state court and publicize the action
- File preliminary injunction
- Publicize CHP policy change
- Negotiate settlement agreement, including "consent decree" and attorneys fees
- Publicize settlement agreement
- Initiate projects in localities across the state to encourage local government to adopt CHP-like policies

For more about the CHP victory, see:
www.AmericansForSafeAccess.org/CHPVictory.