

Weaving the threads together: How to document your campaign

Documenting your campaign is important because...



Other people can learn from our journeys



We can take ownership of our own narrative and build hope in organizing and people power

We can learn from our own journeys, even if they were not entirely successful

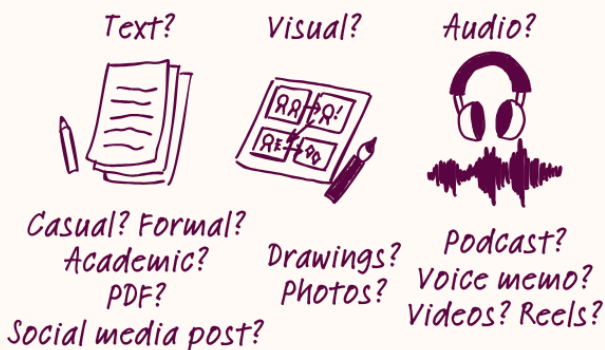


So where should we begin?

1 Clarify the objective



2 Consider the format & depth of the output



...or a combination?

3 Collect the threads



4 Create the outline



5 Start weaving (writing)



illustrations by haruka

Weaving the threads together: How to document your campaign

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Why document your campaign?

Organizers and trainers often look to documentation of other campaigns to learn from and apply to their own campaigns. Often called case studies, such accounts of organizing campaigns show **how organizing has been adapted and practiced in various regions, cultures, thematic areas, and contexts around the world.**

Documenting an organizing campaign is valuable, not only because it can **inspire others to build on that campaign and develop their own campaigns**, but also because it **provides an opportunity for the organizers who ran the campaign to reflect on and learn from their journey in depth**, even if the campaign was not entirely successful.

Moreover, **telling our stories of the power of collective action is critical in building hope in organizing.** And if we don't tell our own stories, someone else will, likely their versions of the stories that sideline people power. It is critical for us to take ownership of keeping records and archiving memories of our campaigns, and contribute to building a broader movement narrative.

In fact, if it were not for the organizers who came before us and documented their successes and failures, we would not be here right now, using the leadership and organizing practices that were built upon those past experiences. It means that if we

document our campaigns now, we can **leave our stories and lessons for the next generations of organizers to learn from.**

In this document, we introduce various formats and depths of campaign documentation (or case studies) that you can choose to create for your campaign. We hope that in however much depth or whatever format that fits you best, you choose to document and share your campaign and your learning with the community.

Read [the Commons Social Change Library article](#) for more information on the importance of documenting and archiving social change moments and movements.

Planning campaign documentation

You may have a campaign in mind that you want to document, or particular lessons or points that you want to illustrate through a campaign. In the latter case, you can examine the resources around you (e.g. talk to some organizers) to decide which campaign would help you draw those lessons and points well. It is crucial to **clarify the objective** of the campaign documentation. Who is your audience? What do you want them to take away?

Once you have the campaign and the objective in mind, consider the **format** and **depth** of your campaign documentation output, based on your **potential audience, their familiarity with the campaign, the preferred length of the document** (e.g. based on how much time the audience has to read it), and most importantly, **how the output will be used**. See [below](#) for the various formats and depths.

Depending on your involvement or familiarity with the campaign, and depending on the depth of the output, you may draw on various sources to collect the ingredients or threads to weave into the documentation. In addition to reading anything related to the campaign (e.g. **campaign document, meeting minutes, used slides, surveys, campaign websites, social media posts, mainstream and alternative media coverage** about the campaign if available), you may want to **interview stakeholders** involved in the campaign, from members of the core leadership team to participants in the main tactic. It is helpful to **start collecting such information while the campaign is still running**, especially if your campaign is long-term or has multiple phases.

Additionally, it is useful to align in advance on **who is involved in the actual work of the documentation** and **who will publish the document** (along with **who funds the documentation**, if applicable). If you do not have resources to achieve the depth and format of documentation that you want to achieve, you can collaborate with an external documenter, by jotting down notes, providing the threads, and asking the external person to do the weaving.

Various formats of campaign documentation

There is no right or wrong in campaign documentation—in telling your campaign story. You might like to write, draw, or speak about your campaign. In addition to **written case studies** that are easily shared and translated to a wide audience, **illustrations, comics, photos, videos, social media posts, reels, voice recordings, songs,** and **podcasts** are all fantastic ways to document your campaign. Indigenous people have long passed down their beliefs, historical accounts, knowledge, and teachings through oral histories. Nowadays, short videos can reach audiences that prefer visually and audibly engaging media, and podcasts or video interviews help smoothly convey the story of the campaign in a conversational manner.

Even when the output is a written document, it is helpful to have multiple formats within that document for the audience to engage with contents in various ways. Readers who do not have time may prefer **a one-pager summary** of a campaign, while readers who like to or need to know the detailed context of the campaign may appreciate **an in-depth article**. It is often effective to include **quotes** from organizers and participants of the campaign, as well as **key visuals, such as images, charts, illustrations, and photos**.

Various depths of campaign documentation

What did you learn from the campaign?

At the very minimum, documenting what you learned from the campaign and sharing it with others can help you and readers carry on those lessons to the next campaigns. Even if you do not have time or resources to dedicate to campaign documentation that includes the background information of the campaign, **taking just half an hour with your campaign team to jot down pluses, deltas, and key takeaways from the campaign can make an impact for you and readers** who can learn from you and apply the learning in their campaigns. A concise list of lessons may especially be helpful for readers who do not have time to process an in-depth case study.

What happened in the campaign?

In addition to the key takeaways from the campaign, documenting factual information about the campaign and how the leadership practices were used in the campaign is extremely helpful for **readers to contextualize the learning and for trainers to teach through that campaign**.

Below is a list of questions you can answer to document what exactly happened in your campaign and to draw out the unique strengths and characteristics of your campaign. You do not need to answer questions that are irrelevant to your campaign.

- **Context** of the campaign
 - People - Who were your people (constituency)?
 - Problem - What problem did they face? What was the context?
 - Change - What change did they want?
 - Power - How did they plan to turn their resources into power?
- How were **public narrative and storytelling** used in the campaign?
 - Why was telling stories important or significant? How did it build power?
 - How did public narrative engage the constituency in collective action?
 - What was the narrative before the campaign started and how did it shift after the campaign?
- How was **relationship building** used in the campaign?
 - What methods were used to build relationships in the campaign?
 - How many one-on-one's were held (internally and externally) and for what purpose?
 - How did one-on-one meetings and/or house meetings strengthen the relationships in the campaign and organization? How did they build power?
 - What was the outcome or impact of the relationships built?
- How was **team & structure** used in the campaign?
 - Who was on the leadership team?
 - How was the leadership team selected and recruited to start the campaign?
 - How did the team decide their shared purpose, norms, and roles?
 - What was the structure in the campaign or organization? What teams were there and how was the leadership distributed? How were the teams connected/accountable to each other? (Share or create a snowflake visual to illustrate)
 - How did the leadership team enable or support local chapter or second-tier teams?
 - How was this structure connected with the strategy? What was the intent?
 - What were the strengths of this structure? What were the challenges?
- How was **strategy** used in the campaign?
 - What was the strategic goal? Why was this the goal?
 - What were the key stakeholders or actors in power mapping? (e.g. supporters, allies, competitors, collaborators, opposition, decision makers)
 - Who was able to make the change that the constituency was interested in? What were their interests?
 - What was the theory of change?
 - At the beginning of the campaign, what was the hypothesis (or hypotheses) for how the change or win will happen? How did this change as the campaign unfolded (if it did change)?
 - How did the constituency use the resources that they had to influence the decision maker?

- What was the organizing sentence?
- What was the campaign timeline? (Visualize the campaign timeline with peaks)
 - What were the key tactics?
 - What were the peaks? How was power built between the peaks?
 - How long did the campaign last?
 - What was the final peak (the peak right before achieving the strategic goal)?
- What were the metrics that were counted and evaluated as impact during the campaign? (e.g. number of house meetings held, number of pledges)
- How was the strategy shifted or pivoted during the campaign?
- How was **action** used in the campaign?
 - What was a successful action from the campaign? Why was it successful (e.g. deployed or mobilized resources effectively, designed motivational tasks, involved a lot of people)
- What **internal and external challenges** did the team come across and how did they overcome them?
- **Wins** of the campaign (Be specific about vivid moments of wins; include both quantitative and qualitative outcomes)
 - How did the campaign develop individual leadership?
 - How did the campaign grow organizational capacity (capacity to organize collectively)?
 - How did the campaign achieve its strategic goal? What change did it create?
 - How did the campaign lead to another campaign or inspire change in other places?

Why did it happen the way it happened? (in-depth case study)

Exploring **not just the what but the why** in your campaign can lead to an exciting, nuanced case study that gives credit to the campaign and its sociopolitical and historical context. Such a full in-depth case study problematizes the implementation of the structure and campaign elements, and provides the nuances of why what was done was significant in that context.

This depth is helpful for **trainers** who need the full picture of the campaign to teach through the case. It also enables **organizers**, who want to learn from other campaigns, to strengthen their understanding of the practices or methodology, as well as the reality within which the framework is applied, and the different kinds of challenges (or successes and pathways) that others have experienced.

While organizing factual information about your campaign using the list above is a useful place to start, the final output of a full in-depth case study has a story arc that weaves together the answers to deeper questions: **Why was the problem a problem? How did people realize it was the problem? How did they get the motivation? How did challenges manifest in the head, heart, and hands?**

Steps to write an in-depth case study

Writing a full in-depth case study may require around 100 to 200 hours, including **interviewing multiple stakeholders** to gather input and **building the story arc**. Below is one example of such a phased process of in-depth campaign documentation.

- **Get introduced**
 - Hold an exploration meeting with the organizers to get a general overview of the campaign
 - Gain access to any information related to the campaign (e.g. [campaign document](#), meeting minutes, used slides, surveys, campaign websites, social media posts, mainstream and alternative media coverage about the campaign if available)
- **Understand the context**
 - Process the information acquired about the campaign
 - Research the context on your own, including social, economic, political, historical, geopolitical, and international considerations and backgrounds of the campaign (This can help you ask deep questions, contextualize the campaign, and analyze the impact)
- **Create the outline** (in parallel to stakeholder interviews)
 - Design the story arc of the document: Why was the problem a problem? How did people realize it was the problem? How did they get the motivation? Heads, hands, hearts - how did this challenge manifest?
- **Interview stakeholders**
 - Stakeholder interviews are critical for external documenters, but also for internal documenters who were part of the campaign to take a step back and get the whole picture of the campaign
 - Identify who to interview
 - Example stakeholders
 - Leadership team members
 - Organizers
 - Participants in the main tactic
 - Allies or relevant external stakeholders in case of a coalition
 - **Ask deep why questions and follow-up questions** to bring out the depth, instead of going through all the questions at a surface-level

- Example questions
 - What happened? (See the list of questions under [What happened](#))
 - Why was the problem a problem? How did people realize it was the problem? How did they get the motivation?
 - What did the power building look like or feel like? What were the enabling factors?
 - What were the vivid moments (including emotions) of the highlights or win moments, and of the lowlights or pain points?
 - What were you thinking and feeling and how did it influence your actions? (head, heart, and hands)
 - What were the moments when certain decisions were made (e.g. shift the theory of change, update the campaign timeline) and why (e.g. what led to these decisions)?
 - What was significant about this team? The constituency? The allies? The opposition? The target? And why?
 - How did the team resolve internal conflicts or points of tension? How did they respond to external threats?
 - What was something unexpected that happened during the campaign? What did it lead to?
 - What will you do differently next time?
 - How did individuals build their leadership through the campaign? What were the enabling factors?
 - How did the organization grow through the campaign? What were the enabling factors?
 - What change did the campaign create? Why was this possible?
 - What next steps did you take or do you plan to take after the campaign? What are your hopes for the future?
- Be emotionally present during interviews
- Ask for permission to record the interview and transcribe for notes later, or get support from others for notetaking
- If you are unable to interview someone whose input is valuable, ask for their written submission to your questions (e.g. email Q&A, survey, voice memo)
- **Weave the story together (writing and editing)**
 - Revisit the story arc based on the collected information (e.g. Should the document be factual, or focus on protagonists' story moments?)
 - The tone of the writing can be anything from casual to formal or academic
- **(Optional) translating to another language**


Templates to get you started

Visioning template: What is the story of your campaign?

When you are just getting started, it might be helpful for you to jot some phrases down in an open space, draw the moments from the campaign that you want to spotlight, and envision the story that you want to tell. The visioning template can help you with that! You can download this template from here ([PDF version](#), [Google Slides version](#)).

Visioning template

What is the story of your campaign?



<div style="border: 1px solid black; background-color: #e0f2f1; padding: 5px; margin-bottom: 5px;"> <p><i>People</i></p> </div>	<p><i>Who were your people?</i></p> <p><i>Who else were the stakeholders?</i></p> <p><i>When/where did this take place?</i></p>
<div style="border: 1px solid black; background-color: #e0f2f1; padding: 5px; margin-bottom: 5px;"> <p><i>Problem</i></p> </div>	<p><i>What problem did they face?</i></p> <p><i>Why was this a problem?</i></p> <p><i>What change did they want?</i></p>
<div style="border: 1px solid black; background-color: #e0e0e0; padding: 5px; margin-bottom: 5px;"> <p><i>Power</i></p> </div>	<p><i>How did they turn their resources into the power they needed to create the change they want?</i></p> <p><i>How did they build their power?</i></p> <p><i>How did they use their power?</i></p>
<div style="border: 1px solid black; background-color: #fff9c4; padding: 5px;"> <p><i>Change</i></p> </div>	<p><i>What were the wins?</i></p> <ul style="list-style-type: none"> • <i>Individual growth</i> • <i>Organizational growth</i> • <i>Societal impact</i> <p><i>What were the key takeaways?</i></p>

Case study template

You can copy and paste the case study template below to jot down notes throughout the documentation process. It is a comprehensive list of questions that are introduced in this guide. You do not need to answer questions that are irrelevant to your campaign or are unnecessary for the output. Answering these questions will enable you to see the draw out the unique strengths and characteristics of your campaign and design the story arc.

Clarify the objective		
<ul style="list-style-type: none"> Who is your audience? What do you want them to take away? 		
Consider the format and depth of the output		
<ul style="list-style-type: none"> How familiar is the audience with the campaign? How much time would the audience have to read (or watch or listen)? How will the output be used? 		
<ul style="list-style-type: none"> Who is involved in the actual work of the documentation? (Do you need to get support from an external documenter? Who do you have in mind?) Who will publish the document? Who funds the documentation? (If applicable) 		
Collect the threads (by accessing and processing information related to the campaign, researching the context on your own, and conducting stakeholder interviews)		
What did you learn from the campaign?		
<ul style="list-style-type: none"> Pluses - What went well? What can be duplicated in other campaigns? 		
<ul style="list-style-type: none"> Deltas - What could be improved? What can other campaigns avoid doing? 		
<ul style="list-style-type: none"> Key takeaways - What did you learn? What are the next steps? 		
What happened in the campaign?		
Context of the campaign	People - Who were your people (constituency)?	

	Problem - What problem did they face? What was the context?	
	Change - What change did they want?	
	Power - How did they plan to turn their resources into power?	
How were public narrative and storytelling used in the campaign?	Why was telling stories important or significant? How did it build power?	
	How did public narrative engage the constituency in collective action?	
	What was the narrative before the campaign started and how did it shift after the campaign?	
How was relationship building used in the campaign?	What methods were used to build relationships in the campaign?	
	How many one-on-one's were held (internally and externally) and for what purpose?	
	How did one-on-one meetings and/or house meetings strengthen the relationships in the campaign and organization? How did they build power?	
	What was the outcome or impact of the relationships built?	
How was team & structure used in the	Who was on the leadership team?	

campaign?	How was the leadership team selected and recruited to start the campaign?	
	How did the team decide their shared purpose, norms, and roles?	
	What was the structure in the campaign or organization? What teams were there and how was the leadership distributed? How were the teams connected/accountable to each other? (Share or create a snowflake visual to illustrate)	
	How did the leadership team enable or support local chapter or second-tier teams?	
	How was this structure connected with the strategy? What was the intent?	
	What were the strengths of this structure? What were the challenges?	
How was strategy used in the campaign?	What was the strategic goal? Why was this the goal?	
	What were the key stakeholders or actors in power mapping? (e.g. supporters, allies, competitors, collaborators, opposition, decision makers)	
	Who was able to make the change that the	

	<p>constituency was interested in? What were their interests?</p>	
	<p>What was the theory of change?</p> <ul style="list-style-type: none"> ● At the beginning of the campaign, what was the hypothesis (or hypotheses) for how the change or win will happen? How did this change as the campaign unfolded (if it did change)? ● How did the constituency use the resources that they had to influence the decision maker? 	
	<p>What was the organizing sentence?</p>	
	<p>What was the campaign timeline? (Visualize the campaign timeline with peaks)</p> <ul style="list-style-type: none"> ● What were the key tactics? ● What were the peaks? How was power built between the peaks? ● How long did the campaign last? ● What was the final peak (the peak right before achieving the strategic goal)? 	
	<p>What were the metrics that were counted and evaluated as impact during the campaign? (e.g. number of house meetings held, number of pledges)</p>	

	How was the strategy shifted or pivoted during the campaign?	
How was action used in the campaign?	What was a successful action from the campaign? Why was it successful (e.g. deployed or mobilized resources effectively, designed motivational tasks, involved a lot of people)	
What internal and external challenges did the team come across and how did they overcome them?		
Wins of the campaign (Be specific about vivid moments of wins; include both quantitative and qualitative outcomes)	How did the campaign develop individual leadership?	
	How did the campaign grow organizational capacity (capacity to organize collectively)?	
	How did the campaign achieve its strategic goal? What change did it create? <ul style="list-style-type: none"> • How did the campaign lead to another campaign or inspire change in other places? 	
Why did it happen the way it happened? (in-depth case study)		
Why was the problem a problem? How did people realize it was the problem? How did they get the motivation?		
What did the power building look like or feel like? What were the enabling factors?		
What were the vivid moments (including emotions) of the highlights or win moments, and of the lowlights or pain points?		

What were you thinking and feeling and how did it influence your actions? (head, heart, and hands)	
What were the moments when certain decisions were made (e.g. shift the theory of change, update the campaign timeline) and why (e.g. what led to these decisions)?	
What was significant about this team? The constituency? The allies? The opposition? The target? And why?	
How did the team resolve internal conflicts or points of tension? How did they respond to external threats?	
What was something unexpected that happened during the campaign? What did it lead to?	
What will you do differently next time?	
How did individuals build their leadership through the campaign? What were the enabling factors?	
How did the organization grow through the campaign? What were the enabling factors?	
What change did the campaign create? Why was this possible?	
What next steps did you take or do you plan to take after the campaign? What are your hopes for the future?	

After collecting the threads in the template above, create the outline (design the story arc), and start weaving (writing)!

Further resources

Resources at the Commons Social Change Library

[The Commons Social Change Library](#) has abundant resources, including a wide variety of campaign documentation and tools to conduct interviews and write case studies. Check out [this page](#) to start exploring!

Examples of campaign documentation at LCN

You can learn from and be inspired by the various examples of campaign documentation at [LCN's Resource Center](#). We are looking forward to expanding this list as this guide enables more organizers to document their campaigns and share with the community.

Written campaign documentation

- [Case Study: Let Me Keep My Childhood “La Tkabrouna” \(Lebanon\), 2022](#)
- [Building “People Power” Against the Sell Out of Serbia to Mining Companies \(Article\), 2022](#)
- [Beyond the Bars Case Study: Addressing Regressive Fines and Fees, and Establishing Free Jail Communication \(2019-2022\) \(US\)](#)
- [How a Healthcare Advocacy Organization is Building a Base Rooted in Community Power \(Case Study\) \(US\), 2022](#)
- [How Vot-ER organized the Pennsylvania healthcare community to register voters \(Case Study\) \(US\), 2022](#)
- [The Power of Organizing: Stories of Community Organizing Campaigns from across Europe, 2021](#)
- [Case study on effectiveness of the LoA pedagogy in bridging caste and gender based divide in Education in Rajasthan, India, 2021](#)
- [Leadership for Rights: A Case Study of Ahel's Coaching of Private School Teachers Campaigning for their Rights in Jordan 2015-2019](#)
- [Health over Stigma: Campaign Report \(India\), 2018](#)
- [Building a Community Organizing Organization: Serbia on the Move \(Case study\), 2017](#)
- [6 Minutes: Community Organizing in Amman, Jordan \(Case study\), 2016](#)
- [Table Turn Over Ladies – Chabudaigaeshi Joshi Action – Be true to oneself, not feminine. \[Case study of community organising in Japan\], 2016](#)
- [Toward Holding the LGBT Coming of Age at Saitama – Coming of Age, Becoming true to oneself \[Community organising case study in Japan\], 2016](#)
- [Groundbreakers: How Obama's 2.2 Million Volunteers Transformed Campaigning in America \(Book\) \(US\), 2015](#)
- [Rights for Moms \[Bravo Za Mama\] Story about moms who made a power shift in Serbia \(Case study\), 2014](#)

Podcasts

- ¡Sí Se Puede! Historias del Cambio (Podcast) (Spanish)
 - [10 episodes in 2024-2025](#)
- Socially Democratic podcast by Dunn Street
 - [Dunn Street: Socially Democratic \(Podcast\) – July 2024 new episodes](#)
- Athar Podcast
 - [Season 2 episodes in 2023](#)

Videos/showcases

- [Orientation to Organizing: Community Power to Achieve Immigrants Justice \(UK\), 2024](#)
- [Stand up with the Teacher: A lesson in Community Organizing \(Arabic and English\) \(Jordan\), 2021](#)
- Other campaign showcases on [the event recording page](#) for LCN members

If you have any questions or suggestions about this guide or about campaign documentation,, please feel free to contact Haruka Sano, Resource Center Lead at Leading Change Network, at haruka.sano@leadingchangenetwork.org.