



**4-Day Organizer Training**  
**Seattle, Washington**

**May 16-19, 2013**

## Training Objectives

Participants will:

- Learn basic organizing skills & understand that organizing skills are learned; they don't just come naturally.
- Participate in field piece to practice outreach skills and deepen understanding of the health care issue.
- Build peer relationships and make deeper commitments to their organizations and the movement.
- Be exposed to Movement History, how our work connects to a "bigger picture," and how to use "bigger picture" messages that cross all of our issues.
- Understand that issues and campaigns are an expression of our commitment to racial and economic justice.
- Understand the purpose of measurable goals and workplans; be prepared to do workplans back in state affiliates.



## Training Team

### **Danisha Christian**

*National Organizer, Alliance for A Just Society*

Danisha began her career in community organizing in 1993. She has worked on a wide array of issues, including school curriculum reform, police misconduct, tribal sovereignty, health care reform, and health equity. She joined the Alliance for A Just Society in 2008 where she is currently a National Field Organizer. Danisha is also an alternative health care provider.

### **Teresa Clark**

*Community Organizer, Washington Community Action Network*

Need bio.

### **Rahul Gupta**

*Communications Director, Alliance for a Just Society*

Need bio.

### **Darlene Huntress**

*National Organizer, Alliance for a Just Society*

Darlene's background is in capacity building, leadership development and political advocacy. She has developed and facilitated capacity building and leadership development seminars for the Maine Democratic Party, A Rising Tide Civic Leadership Training, and the National Gay and Lesbian Task Force. She is originally from Portland, Maine, where she worked for seven years as Public Policy Director with EqualityMaine. During that time she also served as Statewide Field Director the Maine Marriage Equality Initiative. She joined the Alliance team in October 2011.

### **Brian Johns**

*Organizing Director, Virginia Organizing*

Brian Johns first came to Virginia Organizing as an intern in 2000, and then worked as a community organizer from 2001-2005. He spent two years in Pennsylvania doing community organizing with a labor union, and returned to Virginia Organizing in 2007. He is currently the organizer for far Southwest Virginia, covering from Pulaski to the Kentucky border. Brian grew up just south of Richmond in the Petersburg area and worked with the Petersburg and Williamsburg Virginia Organizing chapters, also helping open the Williamsburg office, before leaving in 2005. He is now based out of Abingdon, with his wife Paige and their daughters Lea and Susanna. Since 2011 Brian has also served as the Organizing Director for Virginia Organizing, helping to organize their national and state campaigns and supervising the organizing staff.

### **Fernando Mejia**

*National Organizer, Alliance for a Just Society*

Need bio

### **Jill Reese**

*Associate Director, Alliance for a Just Society*

Jill Reese is the Associate Director of the Alliance for a Just Society. She joined the Alliance in 2003 after serving three years with its affiliate, Idaho Community Action Network. From 2009-2011, Jill directed the Health Rights Organizing Project, a coalition of 35 organizations in 23 states that was instrumental in winning inclusion of health equity provisions in health



## 2013 Alliance for a Just Society 4 Day Organizer Training Agenda

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### THURSDAY—at Southside Commons

### FRIDAY—At Southside Commons

12:00 LUNCH  
1:00 WELCOME  
1:30 RIVER OF LIFE  
2:30 MOVEMENT HISTORY  
3:45 BREAK  
4:00 ORGANIZING FOR POWER  
5:00 PICKING AN ISSUE/RACIAL JUSTICE LENS  
6:00 DINNER  
7:00 TURNOUT/GETTING COMMITMENTS  
8:00 DONE FOR THE DAY

9:00 DIRECT ACTIONS  
10:45 BREAK  
11:00 RECRUITMENT & PERSONAL VISITS  
12:30 WORKING LUNCH: ACTION TRAINING  
1:45 WASHINGTONCAN ACTION  
3:45 ACTION DEBRIEF  
4:00 BREAK  
4:15 CAMPAIGN PLANNING PART 1  
5:00 DINNER AND MOVIE (BOYCOTT)  
7:00 CAMPAIGN PLANNING PART 2  
8:00 DONE FOR THE Day

### SATURDAY—At hotel

### SUNDAY—At Southside Commons

9:00 WELCOME BACK /MEDIA & MESSAGING PART 1  
10:45 BREAK  
11:00 MEDIA & MESSAGING PART 2  
12:30 LUNCH  
1:30 POWER ANALYSIS TOOL  
3:00 LEADERSHIP DEVELOPMENT  
4:00 FUNDRAISING & MEMBERSHIP  
5:00 DONE FOR THE DAY—DINNER ON YOUR OWN

8:00 MEASURING OUR WORK/STANDARDS  
9:00 PERSONAL PLANNING/TIME  
MANAGEMENT  
10:00 PERSONAL DEVELOPMENT  
PLANS/EVALUATIONS  
11:00 BAG LUNCHES /HEAD HOME

## Ground Rules

- **Enjoy Yourself:** relax and do not hesitate to laugh.
- **Listen Carefully:** understand others without interrupting.
- **Fully participate:** participate actively and equally. Ask questions and say what's on your mind.
- **Respect others:** use inclusive and respectful language (e.g. non-racist, non-sexist). Respect privacy if someone says something meant to be confidential.
- **Value Difference:** if you do not agree, challenge each other constructively.
- **Be Open-Minded:** be open to learning new ideas and taking some risks.
- **Challenge yourself:** and others with the use of "I" statements.
- **Be on time:** Please respect the work and time required to implement this agenda. Everyone's promptness, cooperation, and responsibility are needed.

- Reserve side conversations for breaks: we will work to have breaks with respect to the timeline of the agenda.

## Picking an Issue



A good issue meets

the following criteria:

### 1. Compelling and Timely

- It is widely and deeply felt and commands attention
- Potential to affect a large number of people
- Potential to engage a large number of people into action

### 2. Specific and Achievable Goals

- Clear and specific gains to be made whether the issue is immediately winnable or not
- Can be stated in one simple sentence with clear and specific solution
- We have the power and resources to advance our goals
- We have a clear cut target or decision-maker
- We can get organized within a timeframe that we control
- We have the power to frame the issue in the media

### 3. Builds the Organization

- We will be stronger after the issue is either won or lost
- Builds the organizations membership, leadership and funding base
- There are internal opportunities to do political education
- Unifying – it unites diverse and divided constituencies into new and unusual formations – including temporary allies and long-term strategic partners.
- Builds and energizes people of color to join the campaign and organization
- Gives us internal opportunities to do political education on racial justice

### 4. Promotes our long term political values, vision and strategy for systemic change

- Having a clear demand is an intermediate step towards achieving our long term goals for systemic change. The demand should address the root causes of problems, rather than just the symptoms.
- Raises consciousness and promotes messages about systemic problems and solutions both internally, within the organization, externally, in our media work, and in our demands.
- Builds strategic long-term alliances across constituencies, sectors, and issues to build a powerful movement for social justice



- Gives us external opportunities to highlight institutional racism in our data, media work, etc.
- Promotes a demand that promotes racial equity and economic justice.

## Issue Identification Worksheet

Select a: 1) note taker 2) reporter and 3) facilitator. Pretend that you are members of a statewide multi-issue community organizing group that has a strong commitment to continue building a powerful multi-racial social justice organization. You have just won an important victory on an issue you have worked on for over a year. You want to keep up the momentum so that members stay active and new members join. Consider each of the problems below and then decide which ones would make good issues for your group to work on. In the space provided, write down notes about the pros and cons for selecting each issue. Finally, rank the three examples from 1 to 3 with 1 being the issue you would most want to work on.

| Issue                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Pros | Cons | Rank |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|------|------|
| <b>A. ICE Raids:</b> Cities and small towns throughout the Northwest are changing. Communities where the population was predominately white are becoming more and more diverse with a growing population of new Latino immigrants. There is a buzz in the neighborhood about local police coordinating with ICE agents to identify and detain undocumented immigrants. On the way to work one day, there was a roadblock and you notice the police are only stopping people with a dark complexion. There have been reports of children abandoned at school because their parents were captured by ICE agents. More and more of your membership is Latino and they want the organization to take a stand and fight ICE. |      |      |      |
| <b>B. Iraq War:</b> The seventh anniversary of the Iraq war has just passed. There is a growing sentiment that the war must end. The deficit is at an all time high and activists are talking about the cost of war. Your organization primarily works on achieving health care for all. More and more of you membership are impacted as veterans are returning home wounded and alienated. There are reports that the suicide rate among veterans is extremely high. You notice an increase of homeless people in areas where there were none.                                                                                                                                                                         |      |      |      |
| <b>C. Gentrification:</b> The South end of town has always been an area where rent was cheap. Because of this, there is a vibrant community of artists, students, people of color, and young blue collar families looking for inexpensive houses to buy. Recently, you have noticed more and more construction sites. High rise condos popping up overnight. On every corner there are high end bakeries and dimly lit sushi bars. More and more, the neighborhood is changing and the low-income residences are being pushed out.                                                                                                                                                                                      |      |      |      |

## Turnout and Getting Commitments

For grassroots organizations, the **SINGLE** truest measure of our power is our ability to **MOBILIZE**. We can dress up our work with fancy policy work, articulate representatives, press releases that get coverage, etc. But without the true capacity to produce a significant number of people, those things are just window-dressing, “smoke and mirrors.” Excuses don’t work when the rubber hits the road:

- ❖ “We’re sorry Mr. Chairman that more people couldn’t make the hearing – it’s the first week of school. Mary here can give the testimony for the organization. There really are lots of people who care about this...”
- ❖ Try convincing five people who show up to a rally, to yell chants at the top of their lungs, and to march down the middle of the street with a banner. Try convincing them that they have power and are making a difference.
- ❖ Try convincing the two tenants who show up at an action on the landlord that they aren’t going to get targeted for retaliation because the rest of the tenants are *really* behind them.

Getting large attendance at organizational events (meetings, actions...) is not just a matter of getting the word out and hoping people will show up. It requires a methodical approach which involves putting together a numbers-based plan and putting the time into getting the commitments.

**Here are some of the steps that organizers MUST do to make their turnout effective.** These aren’t just suggestions. For an organizer – it’s our job to make sure we have good turnout at our events. If it doesn’t happen, guess who’s responsible? If it does, we build our power, we get wins, we develop leaders, and we have stronger organizations.

1) 50% RULE -- DO THE MATH. It’s remarkable how consistent the *50% show rate* tends to be. If 20 people told you they will be at a meeting, plan on ten. If you need 50 people at an action in order to fill a room, you’d better plan on getting 100 people to tell you yes. If you need 100 yeses, you’d better plan on talking to at least 200 people – more if it’s short notice, or a time commitment of more than an hour, or two or during the work day, or if the relationships are weak.

2) TALK TO PEOPLE ONE-ON-ONE, FACE-TO-FACE. There is a hierarchy of effectiveness in the kinds of contacts we can make with people. Ads in the paper are the least effective, followed by flyers (maybe one in a hundred respond to flyers), meetings, etc. The only real way to get commitments is to talk to people one-on-one. Face-to-face is much more effective in deepening the relationship & increasing the commit and show rate. The Phone is only good with people who you have established, active relationships with.

3) COUNT REAL YESES. The only “yes” is a true commitment to attend. “It sounds interesting” is a maybe. “I’ll try to be there” is a maybe. “I’ll be there if nothing else comes up” is a maybe. Only “Yes, I’ll definitely be there” is a yes. The way you get people to make firm commitments is by asking the question in a direct way: “Can we count on you to be there?” not “Think you might be able to make it?” Counting yeses means writing them down – the best strategy is having a written YES List visible on the wall so you & the team can always keep track of your progress.

### 4) DO 3 CONTACTS

1. Have a face-to-face conversation to get the initial commitment
2. Maintain a connection between the first commitment and the event to shore-up the commitment. Call participants to keep him/her in the loop.
3. Do face-to-face drop-ins to remind all “YES” commitments the week of the event. People have busy lives, they can be forgetful. If they’ve gotten a visit the week of the event, and a REMINDER CALL the day before the event, they’ll remember it. They’ll also be less likely to say yes to a competing engagement

5) GIVE PEOPLE SPECIFIC ROLES. If a person knows that if they don't attend, there will be nobody to run the meeting because they are in charge of that, or there will be no coffee because they are in charge of that, or there won't be anyone at the sign-in table because they are in charge of that, then they tend to take the commitment more seriously.

6) INCREASE THE URGENCY BY "CREATING AN ECHO CHAMBER." If a person hears about the event more than once, it becomes more significant to them. Send a flyer the week before your calls. Get others to announce it at their meetings. Mention it to the people you see on the street "Hi Mary – looking forward to seeing you at the rally Friday. It's shaping up to be a blast!" None of these things work on their own and they don't replace the one-on-one firm commitments, but they help build the visibility and excitement of your event.

7) HAVE A PLAN WITH NUMBERS AND A TIMELINE. None of the advice above will mean anything if you're just winging it one day at a time. Example: If you're building an event four weeks out and you need a turnout of 60 that means you need a plan to get **120 yeses**.

Week One – produce 40 yeses. Need to make at least 80 contacts.

- ❖ At 5 contacts per hour on the phone, you need 16 hours of phone time.
- ❖ Get 4 volunteers to do two hours each—to get you 20 "YES" commitments.
- ❖ Do 8 hours yourself to get 40 contacts & 20 "YES" commitments.
- ❖ You'll also need a list several times larger than the number of people you need to reach, assuming you can't reach everyone – probably 240 (80 x4) might be sufficient.

Week Two – produce 40 yeses. Same plan as week one.

Week Three – produce 40 yeses. Same plan as week one and two. Got yeses you need.

Week Four – Confirm your yeses with face-to-face drop-ins. Reminder calls with all commitments. Prep people with individual pieces of the event.

8) SET CLEAR GOALS. It's important to have specific turnout goals to measure performance.

9) EVALUATE PERFORMANCE. There are 3 levels of performance:

- ❖ Bottom-line – did you hit your numbers, were you prepped and ready? Anything below this level is unacceptable.
- ❖ Success – you hit your turnout goals and are meeting expectations.
- ❖ Excellence goals – you're exceeding expectations. You're a rock-star-stud! \*Aim here so you always meet your baseline goals & often exceed.

## Keys to Boosting Turnout:

### 3 contacts including face-to-face reminder contacts

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**Building deeper relationships with people is key** to building turnout, increasing investment and accountability. Do personal visits with people so you can get to know them, what motivates them. This is the time to get an initial commitment and/or to shore up a commitment that has already been made. These steps can really increase your turnout.

**Make three contacts to solidify turnout, 2 contacts, of these one contact MUST be in person and should have happened during the last 2 weeks before the event.** Rigorous, relentless follow up is critical! It's like "getting out the vote!" People will forget, and those last few reminders make the difference.

**The 2<sup>nd</sup> or 3<sup>rd</sup> reminder MUST be in person!** Do 2 rounds of face-to-face drop-ins and try to catch everyone at least once.

- A face-to-face contact is especially important if you got the first commitment on the phone.
- A week before the event, do a round of face-to-face drop-ins. A visit to the person's home helps remind them that the event is important, that you care whether they come. You can use an excuse to stop by their house: to prepare them to speak; to hand them a flyer with a map of the location; to make sure they have a role at the event; or just say you were in the neighborhood. You can go down your list & stop by people's homes. If the person's at home, then have a 5-10 minute contact to secure their commitment. If they are not there, leave a flyer with details about the action. Return to their house on your next round.
- If possible, add another round of face-to-face visits the week of the event to catch any people you missed.
- If you don't catch people at their homes, make sure that the second contact (actual contact, not just leaving a message) happens by phone!!
- Final round of reminder calls the day before the event. Call through everyone to secure commitment, remind people of logistics. Find an extra detail, update – whatever excuse you need to call them again.

## Actions

### Definitions

1. Direct Action: a group of people confronting a primary or secondary target with a list of demands for institutional change.
2. Organizational Power: having the capability to influence and define what the issues are, what the issues mean, who the good guys are and who the bad guys are.

**Strategic Considerations:** What damage can you cause the decision maker? How does that damage compare to the benefits that he/she gets from conceding to your demand. Our goal is to ensure that the benefits of conceding to our demands outweigh the cost.

| Cost of Conceding to the Demand                                                                                                                                                                                                             | Benefits of Conceding to the Demand                                                                                                                                                                                                                                                                                                            |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>Financial cost of the improvement</li> <li>The possibility of losing campaign contributions &amp; votes from business interest</li> <li>Lose credibility if he or she admits to a mistake</li> </ul> | <ul style="list-style-type: none"> <li>Gain votes from our side</li> <li>Support in the press</li> <li>Appearance of having good will</li> <li>Reputation of responding to community needs and working with constituents</li> <li>May prevent damage we could bring: investigation into wrong doing, business-loss, ruin reputation</li> </ul> |

**Building a strategy means continually upping the ante with the decision-maker until you have demonstrated that you have power to negotiate.**



## ACTION PLANNING

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1. Demands – A demand must be specific. You need to have “primary” and “secondary” demands and procedural demands. The demands must be owned by all attending the action.
2. Turnout – Must be tightly controlled. The group must decide: How many? Who should attend? Leaders vs. Members?
3. One Decisio-Maker
4. The tactic must be fun – it must be inside the experience of the leadership and outside the experience of the decision maker
5. It must demonstrate real power (high numbers of petitions, letters, voter registration, size of turnout, is it news worthy?)
6. Raise the morale of the membership – singing, chanting, signs, props

### Action Tips

- Make an appointment
- Case the joint, gather intelligence
- Hold a dress rehearsal—practice and be prepared
- Only have one spokesperson in an action. Or, may have a small group for information. No matter what, you must decide in advance. Don’t forget to caucus as things come up.
- Ask people to be there at least 15 min in advance

### Questions for After the Action

- Were the demands clear and simple?
- Did it demonstrate real organizational power?
- Who was the target?
- Were your tactics effective during the action?
- How was the turnout?

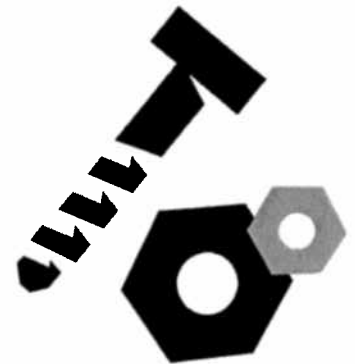
## ***NUTS AND BOLTS OF EFFECTIVE ACTIONS***

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**DIRECT ACTIONS:** A group of people confronting a target with a list of demands for institutional change

### **A. PREPARATION**

1. Demands—specific, immediate, timely, winnable, builds organization, moves campaign forward
2. Target—person with the power to meet demands.
3. Research—gather intelligence on issues/handles, key players.
4. Reconnaissance/scouting -- staging, route, doors, target's office, obstacles.
5. Media plan - before, during, after.
6. Plan Agenda—spokesperson, confront target, testimonial, demands. timing.
7. Recruit members & supporters to attend. Have something for everyone to do.



### **B. DURING**

1. Briefing—review the plan for everyone.
2. Gather at staging area.
3. Receptionist—either ask for assistance or walk by and ignore the receptionist.
4. Security—ignore, divert, deceive or other.
5. Confront target—letter/list of demands
6. Leave with answers and victory!

### **CONTINGENCIES**

#### **1. Receptionist**

- Do you have an appointment?
- Target is out of the office.
- Target is too busy or in the middle of an important meeting.
- Target will be out in a few minutes.

#### **2. Security**

- Blocks entrance.
- Threatens to call the police.
- Police actually come.

- Police threaten arrest.

### 3. Target

- I'll meet with three representatives.
- I'll give you an answer tomorrow.
- Why didn't you set up an appointment?
- Makes new offer that sounds good.
- Attacks organizer.

### 4. Leverage

- Media covering action.
- Camera, Camcorder, Tape recorder, Notepad.
- Signs with your Demand listed
- Kids and grandparents.

## C. AFTER

1. Debrief immediately—make sure it's a learning opportunity & upbeat no matter what!
2. Letter to target to get commitment in writing.
3. Follow-up.

## DIRECT ACTION ROLE PLAY

**Organization Name:** DREAM in Action. DREAM in Action is a youth community organization defending the rights of undocumented students in the state of Washington.

### Constituency/membership of DREAM in Action:

- Over half of the organization's membership is undocumented youth of color.
- 15% are Asian, 55% Latino, 15% African American, 15% Whites.
- Most of the members are from low-income or working class and immigrant families and about 10% are from middle class families.

### Background Info on Issue:

- Recently, at a DREAM in Action membership meeting, several students heard that the DREAM Act passed in the US House and the US Senate will be voting very soon on this bill.
- The DREAM Act is a piece of legislation that if it becomes law it will allow undocumented youth to pay in-state tuition at their local colleges (currently, undocumented youth have to pay out-state tuition in most states in order to continue with their university education); and begin the path for earned citizenship.
- Washington State allows undocumented youth to pay in-state tuition if they have graduated from a local high school – but many young people are graduating from college and are not able to join the workforce because of the lack of legal status.
- Based on some reports and analyses, it seems that the vote will be very close in the Senate – with so far 55 reporting yes, and 48 No, and 7 undecided.
- Senator Patty Murray has supported the bill in the past, but she is having second thoughts because of the upcoming election.

### DREAM in Action Takes Action:

- **Step One**
  - DREAM in Action planning committee decides to target Senator Patty Murray
- **Step Two**
  - DREAM in Action does research. This is what they learned:
    - Some of Senator Murray's supporters are religious organizations that have worked with the immigrant community.
    - The Washington Education Association heavily supports the Senator.
- **Step Three**
  - DREAM in Action members write a letter requesting a meeting with Senator Murray – in fact, they even called. No one responds.
  - You and other DREAM in Action members decide to visit Senator Murray's local office, since she has not responded to your written request to meet.

- Step Four – Here's where you come in.
  - PLAN YOUR ACTION!
  - Here are your (DREAM in Action) demands:
    - To support the DREAM Act and become a sponsor of the bill.
    - To become a champion of the issue and contact and persuade other US Senators to vote YES on DREAM Act.
  - **Assign roles:** make sure that you have a spokesperson who can articulate these demands on behalf of immigrant youth.

YOU HAVE 20 MINUTES TO PLAN THE ACTION.

YOU HAVE 20 MINUTES TO EXECUTE THE ACTION.

## Why Recruit?

### The Ladder of Membership Recruitment Effectiveness

One-on-one homevisits, doorknocking, canvassing

Small group meetings: housemeetings, etc.

Organizational Events and Activities

Phone Canvassing

Personal Letters

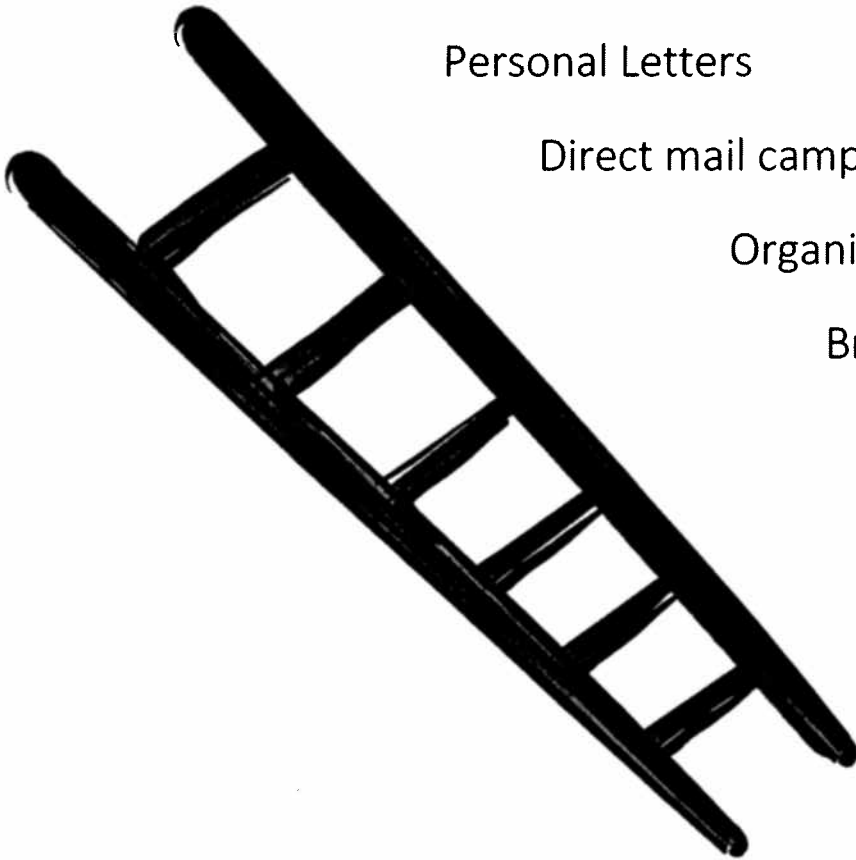
Direct mail campaigns

Organizational newsletters

Brochures and Flyers

News Items

Ads



**\*\*ORGANIZATIONS THAT AREN'T GROWING ARE DYING\*\***

## Recruiting Specific Constituencies

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Often we want to recruit a specific constituency or community. What are some examples of places & methods to recruit our target constituents?

- Welfare recipients – social service offices
- Youth – schools, youth programs, youth events.
- Immigrants – community centers & spaces (e.g. churches, clinics, etc), immigrant neighborhoods, workplace, housemeetings.
- Medicaid recipients – Health clinics, social service offices
- African Americans – Community centers & spaces, black neighborhoods, workplace, housemeetings.
- Women – Women’s clinics, childcare centers, women dominated workplaces/stores.

**\*\*One-on-ones:** Once we make the initial contact we still do one-on-one visits with people to deepen the relationship, find out their interests and their networks.

## The Importance of Relationships

People to people relationships are the most important part of a community organizing effort. It is through personal relationships that we build the mutual trust and respect that allows us to unify, share decision making, and take action together on an ongoing basis.

There are two types of contact we have with members of our organization: task and relationship; both play important roles in moving our organizations forward.

We cannot achieve success if we use only one type of contact. If we only did relationship, nothing would get done. If we only did task, we wouldn't develop leadership with a long-term vision for the organization.

### Continuum of TASK <<<<<>>>>>RELATIONSHIP

| TASK (ex: turnout calls) | RELATIONSHIP (ex: homevisit)  |
|--------------------------|-------------------------------|
| task most important      | person most important         |
| short-term               | long-term                     |
| single-faceted           | multi-faceted                 |
| sell/convince            | offer opportunity/proposition |
| talk                     | Listen                        |
| you decide               | they decide                   |

Our goal is to develop trusting and lasting relationships where members of our organization take responsibility for building the organization.

**One-on-ones are key to relationship building.** In all the methods of one-on-ones, getting some form of commitment at the end is a key goal. However, the commitment may vary. If a person isn't a member of the organization, getting her/his commitment to pay membership dues is the likely thing to ask for. It may also be for her/him to turn out to a meeting or event, distribute flyers in their neighborhood, or make a list of people they know that they can recruit to the organization.

| 1-1 Method | Who talks?   | Visit Lasts?                        | Goal?                       | Where?                       |
|------------|--------------|-------------------------------------|-----------------------------|------------------------------|
| Canvass    | Canvasser    | 2-5 minutes                         | Membership                  | On porch                     |
| Door-knock | Door-knockee | 20-30 minutes                       | Membership and Relationship | Inside, living room, kitchen |
| Home-visit | Home-visitee | 20-60 minutes<br>culturally defined | Relationship and commitment | Inside, living room, kitchen |

## Personal Visits

**Personal Visits** are the most effective way to build deeper relationships.

Four major parts to a personal visit:

1. Make a connection—introduce yourself, who are they?
2. LISTEN, LISTEN, LISTEN!—for self interest & motivation
  - 80% listening, 20% guiding, agitation questions.
  - A meaningful relationship with someone requires knowing and caring about their *worries, concerns, dreams, and/or aspirations*. These self interests, whether narrow or more enlightened, are the driving forces behind a person's actions.
  - **NEVER make assumptions about a person's self-interest.** You must ask and even probe to really find out. **And then you have to listen.** A person's self-interest may range from wanting to address a specific problem to wanting to learn or feel good about working with others.
3. Agitate, polarize, validate and build a vision—for their interest & participation
4. Get commitment





## Personal Visits Role Play – Instructions

### Scenario:

You are an organizer with an Alliance affiliate. It is Saturday morning, and you have been assigned to do personal visits with potential active members and leaders. The people you are visiting have been identified as “hot contacts”—people who are excited about and/or affected by the issues. They were probably visited by another organizer who spent 15-20 minutes with them during doorknocking to tell them about your campaigns. They may have been visited as recently as a month ago, or even as long as a year ago.

### Your job:

1. Make a connection—introduce yourself, reintroduce the organization, who are they?
2. LISTEN, LISTEN, LISTEN!—for self interest & motivation
3. Agitate, polarize, validate and build the vision —for their interest & participation
4. Get commitment

### Current campaign:

**Take Our State Back from the Big Banks** – Your organization has made a name fighting for working families. In the most recent legislative session, big banks used the money in customers’ bank accounts to lobby legislators to keep a \$67 million state tax break – and won. That money is needed to pay for teachers, health care, and libraries. **Your organization is working to identify people who will be impacted by the cuts that are the result of this tax break to big banks.**

### Key commitments:

1. Become a member or renew membership.
2. Register for the upcoming Leadership Conference and Annual Meeting.
3. Sign the Take Back Our State Pledge.

### Instructions:

- Each group will have four-five participants – two teams of two or three people. In your teams, one person should take the lead and the second should write the responses to the questions on the “Personal Visits Worksheet.”
- The other team should just listen and pretend they are not there (until it’s time to give feedback).
- As you move to the next home, switch leads so that each participant gets a chance to do one personal visit & to get feedback.
- You will visit four “homes” in this role-play – with a new person leading each personal visit.
- HAVE FUN!!!!

### Timing for each “home”

- 7 minutes for personal visit. A bell will ring after 6 minutes & you have 1 min to wrap up.
- The bell will ring again when you must STOP to debrief.
- 3 minute trainer debrief – Bell will ring after 3 min.

## Personal Visit Tips

1. **Make a connection – this is about building relationships.** Be friendly & set the tone! Thank them for having you over, make chit chat. Find out how long they've been living here, and who lives here. How did they first meet your organization? How have they been involved?
2. **Tell them why you're here.** THEY brought up issues, said they were interested. We're here to follow up & hear more. To say hello, get to know them better, to share what the organization is about, what we do, what they can do.
3. **LISTEN, LISTEN, LISTEN for self-interest & motivation – 70% listening, 30% asking guiding questions!!** What makes them tick? What motivates them? What's their self-interest? Who are they? What potential do they have? What skills and networks do they have? What are their values & beliefs? What are their weaknesses, prejudices?
4. **Agitate, polarize, validate on the issues – Set up the peak of energy for the "ASK."** What makes them angry? Connect what their issues & anger with taking action. Affirm their experience, ask WHY questions, point to how many in the community experience this! Move them towards your commitment.
5. **Put it back on them – have THEM say their issues, communicate importance & urgency of THEIR participation –** Together we can change things! Put responsibility on THEM to act. Paint a picture of what they can do.
6. **At the height of interest & energy, ask directly for a specific commitment. Then be silent!** If you get a no, re-agitate to get the energy back up & ask again.
7. **\$\$ Membership Ask – Assume support -- You're giving them an opportunity to be a part of a winning team!** Ask for a specific dollar amount, assume support, be confident. Ask first for membership, and then ask for other commits. Let them answer! Only after they answer, propose options such as post-dating check, breaking up pledge over a couple payments, but be sure to collect a portion of the dues today!
8. **Affirm their Commitments & Explain Logistics –** Affirm what a difference they will make & give them a role. Make sure people have logistics for events, have a written record of what they committed to (a calendar, a form)
9. **Good follow up is KEY –** During the visit & RIGHT afterwards, record commitments, take good notes, make clear follow up steps & then just do it!
10. **Have FUN!** This can be the most rewarding part of organizing – relax, practice, be yourself and enjoy!



# Personal Visit Worksheet

What motivates this person?

Which issue is s/he interested in?

Health Care

Hunger

Immigrant Rights

Jobs and Wages

Does the issue/s affect her/him personally? Is s/he willing to work on the issue?

What is her/his level of anger/concern/commitment?      Mild              Medium              Hot

Did you identify any way s/he can help in outreach? Which ones?

Will s/he attend an organizing committee meeting?

Profile:

Became a member

Race/Ethnicity

Gender

Sexual orientation

## Campaign Planning

Goals: What are the goals of the campaign? (Long-term, Short-term)

Organizational Considerations: What are the resources does the organization bring to the campaign?

In what specific ways was the organization strengthened by the campaign?

What internal problems were there?

Constituencies: Who cares about the problems? Why do they care?

Decision-makers: Who has the power to solve the problem and grant the organization's demands?

Who has power or influence over your decision-makers?

What are the vulnerabilities of each decision-maker?

Tactics: What tactics were used during this campaign? (and which tactics were actions?)

What were the tactics used by the opposition?

Describe the media strategy and the messages that defined the campaign

What role does culture play in this campaign?



## Strategy Chart

| Goal                                                   | Decision Maker Target                                                                                   | Opposition "Them"                                                    | Allies "Us"    | Resources                            | Tactics                                            | Media and Message                                              |
|--------------------------------------------------------|---------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|----------------|--------------------------------------|----------------------------------------------------|----------------------------------------------------------------|
| What do we want?<br>(Politically and Organizationally) | Who makes the decision – who can give us what we want? And who can influence them – "secondary targets" | Who is potentially against us?<br><br>How could they be neutralized? | Who is for us? | What can we use to get what we want? | What steps do we want to take to get what we want? | What is your message?<br><br>What are the press opportunities? |
| Race/Culture                                           |                                                                                                         |                                                                      |                |                                      |                                                    |                                                                |
|                                                        |                                                                                                         |                                                                      |                |                                      |                                                    |                                                                |

## Power Analysis Tool

**STEP 1: Define the major economic political, and / or social Conditions which are negatively impacting primary constituencies.**

**STEP 2: Sketch the Competing Agendas. The agenda of the forces who are causing or the problems, and your agenda.**

**STEP3: Plot the Key Decision-makers/Power Centers**

Go through each sheet and have group collectively decide where to place the decision-maker on the power matrix

- |                         |    |                                 |
|-------------------------|----|---------------------------------|
| (1) How far to the Left | or | How far to the Right            |
| (2) How High            | or | Low on the vertical power scale |

{

During the next steps be sure to probe/push people to be accurate in their assessment of where to place each group Left-to-Right, and where to place them in terms of how much power they have

}

**STEP 4: Plot the Major Battles/Campaigns which are happening in the area**

Go through each sheet and have group collectively decide where to place the battle/campaign on the power matrix

- |                         |    |                                 |
|-------------------------|----|---------------------------------|
| (1) How far to the Left | or | How far to the Right            |
| (2) How High            | or | Low on the vertical power scale |

**STEP 5: Plot Organized Opponents**

Go through each sheet and have group collectively decide where to place the opposition groups on the power matrix

- |                         |    |                                 |
|-------------------------|----|---------------------------------|
| (1) How far to the Left | or | How far to the Right            |
| (2) How High            | or | Low on the vertical power scale |

**STEP 6: Plot Your Organization and Your Organized Allies**

Go through each sheet & have group collectively decide where to place the opposition groups on the power matrix

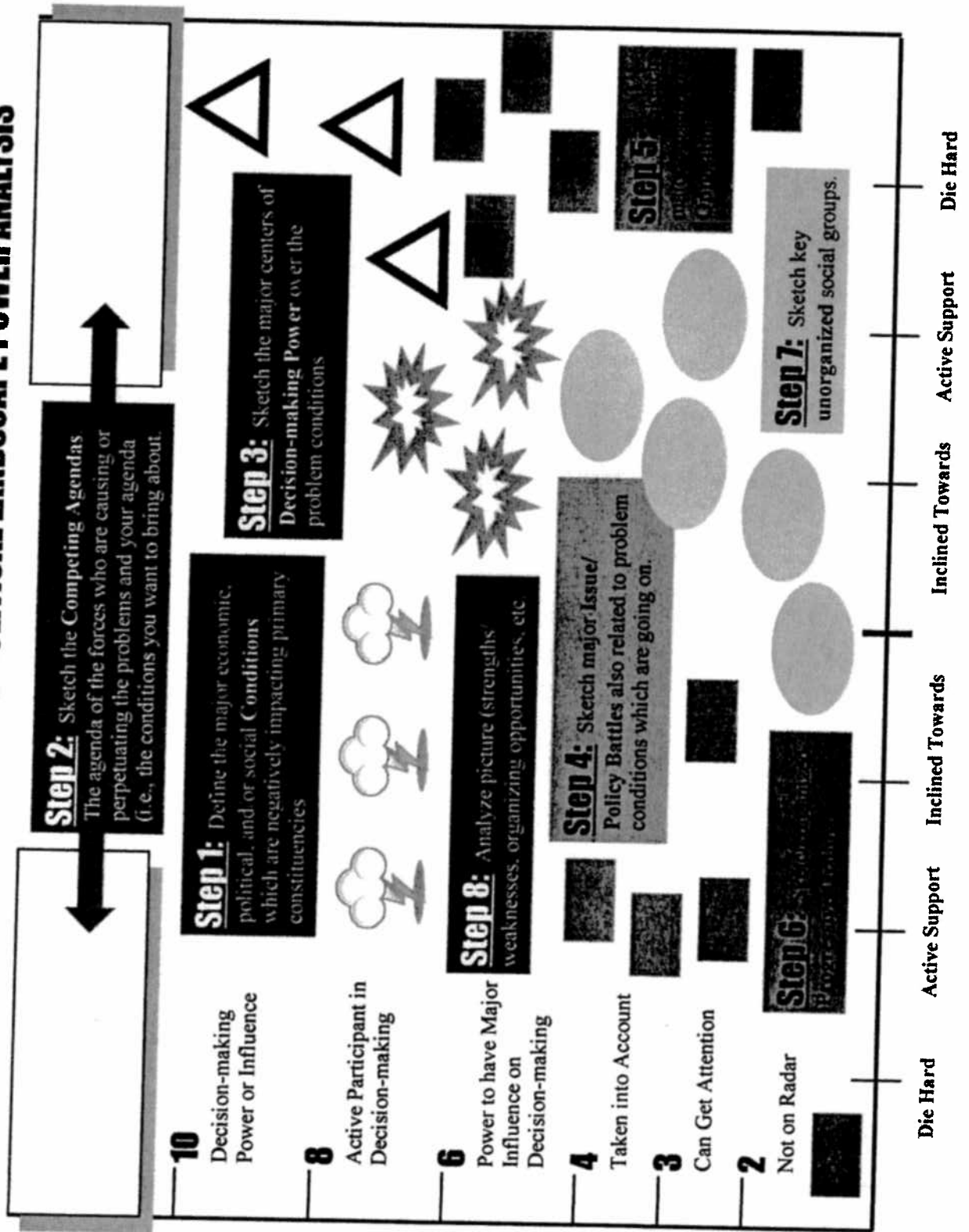
- |                         |    |                                 |
|-------------------------|----|---------------------------------|
| (1) How far to the Left | or | How far to the Right            |
| (2) How High            | or | Low on the vertical power scale |

**STEP 7: Plot Other Unorganized Social/Economic/Political Groupings in the area**

Go through each sheet and have group collectively decide where to place the social groups on the power matrix

- |                         |    |                                 |
|-------------------------|----|---------------------------------|
| (1) How far to the Left | or | How far to the Right            |
| (2) How High            | or | Low on the vertical power scale |

## STEPS TO DEVELOP A STRATEGIC POLITICAL LANDSCAPE POWER ANALYSIS



## POWER ANALYSIS MATRIX

| OUR AGENDA |                                                        | OPPOSING AGENDA |                |                  |                  |                |          |
|------------|--------------------------------------------------------|-----------------|----------------|------------------|------------------|----------------|----------|
|            |                                                        | Die Hard        | Active Support | Inclined Towards | Inclined Towards | Active Support | Die Hard |
| 10         | Decision-making<br>Power or Influence                  |                 |                |                  |                  |                |          |
| 8          | Active Participant in<br>Decision-making               |                 |                |                  |                  |                |          |
| 6          | Power to have Major<br>Influence on<br>Decision-making |                 |                |                  |                  |                |          |
| 4          | Taken into Account                                     |                 |                |                  |                  |                |          |
| 3          | Can Get Attention                                      |                 |                |                  |                  |                |          |
| 2          | Not on Radar                                           |                 |                |                  |                  |                |          |

## Qualities of a Leader

**Motivates, inspires and develops.** A good leader motivates, inspires and develops others. A good leader is recognized as such. Leaders are people who have followers.

**Anger at injustice.** Anger propels you to act. Anger can be helpful and constructive when it is focused, aimed for good.

**Positive outlook.** Leaders look for solutions to problems instead of focusing on the difficulties.

**Confidence.** A leader that is confident will understand their weaknesses and ask for help when they need it. They will also stand up for themselves and their organization even in the face of adversity.

**Honesty.** Honesty, tempered with tactfulness, is always the best policy.

**Critical perspective.** Leaders are frequently the people who ask “why” and “why not?” A healthy skepticism – especially of unaccountable leaders and institutions – is beneficial.

**Courage.** A leader has courage and is willing to take risks. As the saying goes, “Nothing ventured, nothing gained.” A good leader is willing to accept challenges and work outside their comfort zone.

**Agitation.** A leader stirs things up. You can’t get clothes clean without an agitator.

**Imagination.** Good leaders rely on their imagination to find creative solutions to problems and to think through what they’ve never tried before.

**Values and Vision.** Good leaders are clear about their values and have a have some idea about what they would like the world to be like. A good leader is willing to stand up and work to make those values/visions a reality.

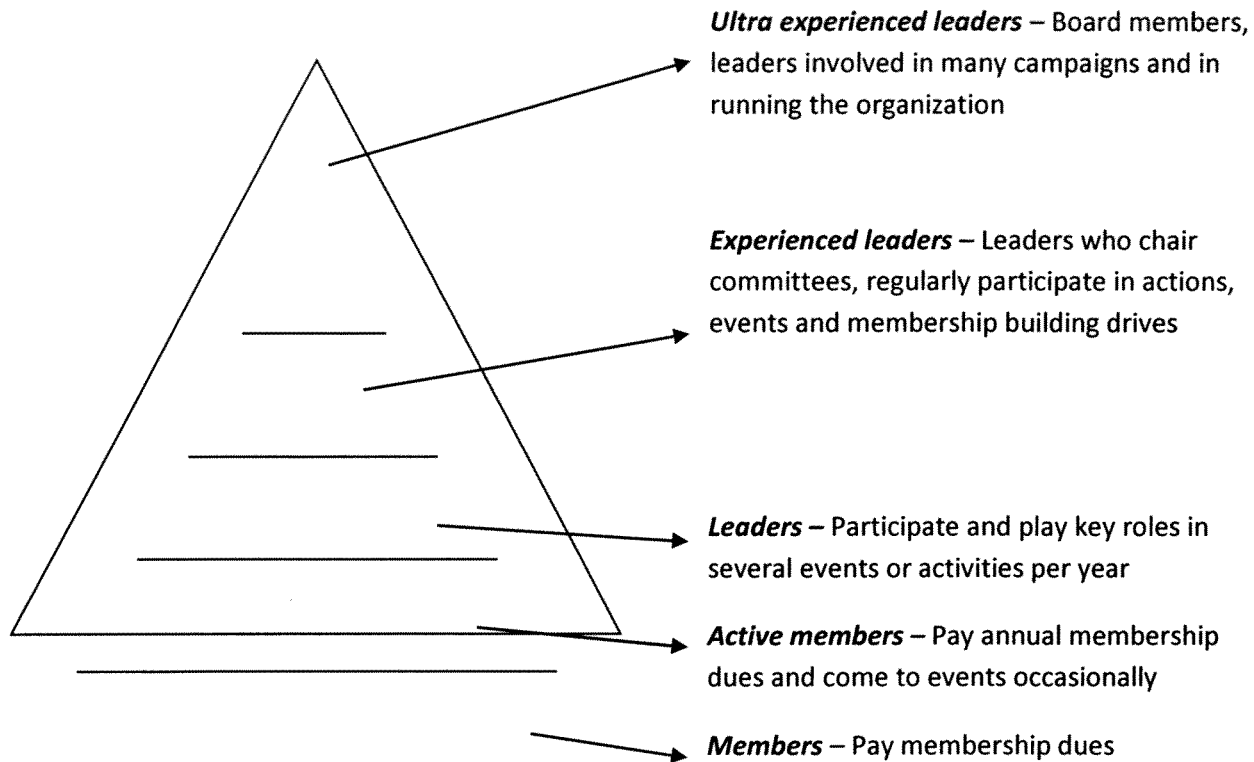
**Accountability.** A good leader is able to hold others accountable to their commitments and is willing to be held accountable by others. A good leader lives up to their commitments and is interested in reciprocal relationships.

**Trust people.** Given the opportunity, people tend to do the right thing. Leaders allow people to make mistakes. They see and capitalize on potential in others and encourage them, listen to them, and respect them. Leaders don’t violate the iron rule, which is to never do for others what they can do for themselves.

**Delegate.** Good leaders are able to share power and responsibility. They do not wish or need to do everything or control everything. They believe in a collective leadership and encourage and develop the talents of others.

**Sense of humor.** A sense of humor acts as a safety valve for anger. It’s a way of staying sane during the struggle for social change. Good leaders can sit back, look, and laugh once in a while.

Members and leaders play different roles. We need a good mix. Healthy organizations should look like this:



## Fundraising and Membership



To build power and influence in our society you have to be able to talk about money. Ask for money; acquire it and then spend it!

### Who Gives in America?

84% of the money donated in the US is from individuals, dead or alive.

In 2001, \$212 billion dollars were "given to charity" in the US (There are 1000 millions in a billion).

- |                          |           |
|--------------------------|-----------|
| • Individuals            | 76%       |
| • Bequest                | 8%        |
| • Foundation             | 12%       |
| • Corporations           | 4%        |
| • Religious Institutions | (unknown) |

## 5 Basic Skills of Fundraising

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- Kiss – Keep it short and simple.
- Ask for a specific amount – people tend to get what they ask for.
- Ask for a check – it conveys professionalism and protects both you and the donor.
- Maintain eye contact – it builds the trust.  
(When culturally appropriate)
- Be conversational – it sets people at ease and involves them in the conversation.

## Measuring our Work: Standards

Elections are won 50% + 1

Art and Science to our work

What is measurable?

Mutual responsibility between Staff and Supervisor

to have Clear Expectations

Attitude of Evaluation



***We are what we repeatedly do. Excellence,  
then, is not an act, but a habit -Aristotle-***

## Time Management Matrix

### The Activities:

#### **I. Urgent**

important

crisis  
pressing deadlines  
pressing problems  
deadline driven problems

#### **II. Not Urgent**

prevention  
relationship  
recognizing new  
opportunities

#### **III.**

not important

interruptions  
some mail, some reports  
some meetings  
proximate, pressing matters  
popular activities

#### **IV.**

trivia  
busy work  
some mail  
some phone calls  
pleasant activities

### The Results:

#### **I.**

stress  
crisis management  
burn out  
putting out fires

#### **II.**

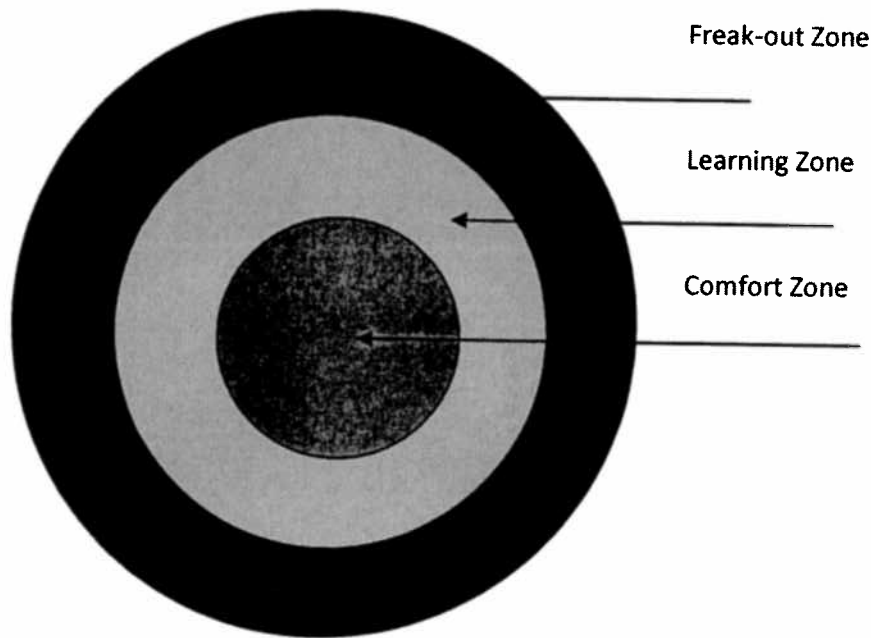
vision balance  
perspective  
discipline  
control  
few crises

#### **III.**

short term focus  
crisis management  
reputation chameleon character  
shallow or broken relationships

#### **IV.**

total irresponsibility  
fired from job  
dependent on others or institutions  
sees goals and plans as worthless



---

### Stewardship Delegation

Focused on results instead of methods. It gives people a choice of method and makes them responsible for results. It takes more time in the beginning, involves clear, up-front mutual understanding and commitment regarding expectations in five areas:

**Desired Results:** focus on what not how

**Guidelines:** few, if you know what doesn't work

**Resources:** human, financial, technical or organizational

**Accountability:** standards of performance

**Consequences:** specify what will happen good and bad

