



INCREASE YOUR INFLUENCE

**AN ORGANIZING WORKSHOP
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INTRODUCTIONS

LEARNING WHO'S IN THE ROOM

PRESENTATION AGENDA

- Making a plan
- Tools in the toolkit
- Best practices
- Learning by doing!
 - Let's choose a practice item together



MAKING AN EFFECTIVE PLAN

PLANNING FUNDAMENTALS

- Why do we plan? Because even the best ideas and campaigns will not be successful without a plan.
- To make a plan you need:
 - Clear understanding of your **goals**
 - An honest assessment of the “**lay of the land**”
 - Resources – this can be \$\$, a coalition, people, relationships, etc. (Basically, a **power map**)
 - A list of **tools and tactics** that is based in reality and produce real results
 - A timeline that starts at your goal and works backwards (aka, a **backwards plan**)
- What else do we need?

REPRODUCTIVE HEALTH EQUITY ACT

Learning by example – we'll talk about
the campaign to pass House Bill 3391,
the Reproductive Health Equity Act



EXAMPLE PLAN PART 1: GOALS

- Our goal may seem obvious: Pass House Bill 3391, but there was more.
- We also wanted to:
 - Fully fund the bill
 - Pass the bill with little to no amendment or “horse trading” – with our bill or other bills
 - Make it okay to say the word “abortion” in the legislature
 - Turn legislators into champions, not just supporters
- When planning, you need to spell out ALL of the goals from the beginning, especially if you are working in coalition

EXAMPLE PART 2: LAY OF THE LAND

- Going into the session, we knew there were several dynamics that would affect our bill:
 - Measure 97 failed
 - The state was facing an enormous budget shortfall
 - Partisanship had been high in the 2016 session, so tensions were high in 2017, too
 - The legislature would try to raise taxes
- The bill had been introduced in 2015, and had died very controversially, so the tension between legislators and our coalition was also high

EXAMPLE PART 3: POWER MAP

- Our coalition was very powerful, and had successfully gotten on the Fair Shot agenda, taking our members from approximately 20 to 60 overnight
 - Our coalition had a strong mix of organizations with different strengths, ranging from communications to field – something we needed to know in order to plan
- Our steering committee members had strong relationships with key legislators, including the Majority Leader, the Co-Chair of Ways and Means, and several other legislators in leadership. We also had the strong support of the Governor
- After identifying our existing support, it became much easier to map out the additional support we would need to get the votes to win

EXAMPLE PART 4: BACKWARDS PLAN

- (Almost) every campaign has a deadline – whether it's Election Day, or in our case, the last day of session. We knew we had to pass our bill before the session ended. Starting there, we worked backwards.
- We made a timeline, and we added key dates – like vote deadlines in each chamber
- Then we filled in tactics and tools and strategies, based on key pressure points that we had identified
 - For example, we knew we would need to increase public pressure on legislators before key votes, so we planned to increase calls and emails at that time

EXAMPLE PART 5: TOOLS AND TACTICS

- Based on the organizations in our coalition and their capacity, we identified key tools and tactics that were a) possible and b) the strongest and most likely to help us win.
- Examples included:
 - Phone calls to legislators
 - Emails to legislators
 - Letters from influential “validators,” like doctors and small business owners
 - Professional lobbying
 - Strong media relations



**LET'S TALK
ABOUT TOOLS**

TOOL 1: STORIES OF SELF

- The single most effective campaign tool is something we are all capable of doing – it's telling stories. Stories about ourselves, about our candidate, about our issue.
- Stories help us connect people's hearts with their minds, and inspire them to act.
- There are two theories of story-telling (that I like):
 - Self – Us – Now
 - Challenge – Choice – Opportunity
- Let's watch an example: <https://www.youtube.com/watch?v=SbTwocGbgul>

TOOL 2: PHONE CALLING

- Calling voters
 - Do the math: An average person can call about 30 numbers an hour. Maybe 5 – 10 % of those people will answer – so you need a high volume to be effective
 - Calling gets harder every year – people don't have land lines, and there are different laws for cell phones
 - You have to get the voter file, and those numbers are bad
- Calling elected officials
 - Constituents are more effective than any random person calling (elected officials are accountable to their voters)
 - More effective the higher up you go – legislators, congress
 - You have to organize people to call, and give them the tools – remember, quality over quantity
 - *Unless* you are trying to generate volume – like to save Medicaid
- Different kinds of calls: patch throughs, phone banks, auto-dialers

TOOL 3: TEXTING

- There are tools, like Relay and Hustle, that take your contact database and help automate texting
- New rules say they have to be opt-in, you can't just text random numbers
- One of the most effective ways to reach young people
- Can be used for volunteer recruitment, rapid response, fundraising, or GOTV
- Expensive overall, but cheapest per contact

TOOL 4: CANVASSING

- Do the math – an average person can knock 20 doors an hour. A candidate can do about 15 doors an hour. In an hour of knocking, you'll be able to reach somewhere between 4 and 5 people, usually.
- Base-building
 - For primaries, and early on in general election or issue campaigns
 - You can't assume people are with you – you have to build up a base of support
- Persuasion
 - In any campaign, used in the middle, and sometimes all the way to the end.
 - You have to talk to voters/people about your shared values, and persuade them to your position.
 - DATA IS NOT PERSUASIVE
- GOTV
 - Once you've reached the last 2 weeks or so before your end-date, you have to turn out the people who you identified as supporters.
- Street canvassing

TOOL 5: PETITIONS

- Think sign-on letters, pledges, etc.
- They are a great way to list-build – so make sure you are collecting helpful info, like emails, cell phone number (with text message opt-ins), and addresses (or at least zip codes)
- You can collect them in many ways
 - Online (social media, email, etc.)
 - In-person – pledge cards or real petitions

TOOL 6: WRITING LETTERS

- There are multiple ways to run letter-writing campaigns:
 - Postcards
 - Emails
 - Hand-written letters
- No matter what, make sure you have a script or clear talking points – these are effective when they are high quality and high volume
- No, they don't read them (I'm sorry to say)
- Yes, volume does count
- Sometimes, quality is better than quantity

TOOL 7: LOBBYING

- Grasstops vs. grassroots
 - Grasstops: Getting high-visibility, high-stature people to lobby for your issue
 - Grassroots: getting everyday folks to lobby their elected officials (either by calling, writing, or showing up in person)
- Professional lobby capacity can be helpful, but isn't always necessary. When you make your plan, your analysis needs to include whether you need a lobbyist.
- Organizing big rallies can be helpful, but so can high-quality constituent meetings or lobby visits.
- Capitalize on existing relationships – see elected officials as allies, not adversaries.

TOOL 8: SOCIAL MEDIA

- Social media tools can be used to amplify everything you do – including the other tools/tactics we've talked about so far.
- If you're going to use social media, have a plan. Posting hap-hazardly won't get you any followers, and no one will engage.
- Different mediums:
 - Facebook – good for sharing out news and petitions, targeting mostly older folks
 - Twitter – good for rapid response and generating attention from politicians and the media
 - Instagram – good for engaging younger people and for creating organic content, like stories
- The more people who can post or share the *same thing* the bigger the impact

TOOL 9: REGISTERING VOTERS

- Not as big a deal in Oregon anymore (yay AVR!) but still effective in highly mobile communities (college students) and with younger folks – high school students can register at 16 now.
- Can be a way to list-build if you can get folks to sign up when you register them
- Great for visibility (take photos and share on social media)
- Rarely, if ever, a part of a candidate campaign (you don't have the resources)

TOOL 10: THIRD PARTY VALIDATORS

- Identify high-profile or recognizable people or types of people to support your issue
- Can be persuasive in large or small numbers
- Think:
 - Moms for Obama
 - Small Business Owners for Measure 97
 - Faith Leaders for Reproductive Health Equity
- Can be especially persuasive if you find “unlikely” allies to support you publicly
- Can be great grassroots lobbyists and messengers

TOOL 11: MEDIA

- Earned vs. Owned
 - Earned: stories that are generated because of something you've done – organize a 500-person rally, etc.
 - Owned: stories you've generated yourself – OpEds, LTEs, etc.
- Both are effective, but they take a LOT of work
- You can organize LTE campaigns (I have a helpful guide I can share) but someone needs to be committed and organized
- Earned media requires a communications strategy and PLAN (it doesn't usually just happen)



BEST PRACTICES

ADVICE FROM YEARS OF CAMPAIGNS

STICK TO THE PLAN

- You write a plan so that when things get hard, you can focus and execute, and not get distracted.
- Don't let minor bumps distract you from your goal
- Don't get bogged down in what your opponent is doing, or not doing

MAKE A CLEAR ASK

- Whether you are recruiting volunteers, talking to members of congress, or voters, you need to have a single, clear ask.
- Be direct
- Too many asks or too many subjects muddies your message (aka this presentation is not a good example!)

“ALL THE COOL KIDS ARE DOING IT”

- Peer pressure in campaigns WORKS.
- Whether you're doing GOTV or just trying to build your base, always emphasize:
 - If it's an election, that turnout will be high and that everyone else is voting
 - If it's an issue campaign, that tons of folks are supporting you, and that everyone is on board
- People want to join things, they want to be part of movements, and participate in big actions – so make it seem big!

HAVE A CLEAR MESSAGE (AND A SCRIPT)

- The best campaigns have a simple message, and they repeat that message over and over so that it sticks.
- The best messages are personal, and resonate with people's emotions. They touch on shared values and ideas.
- When campaigns go off script, voters and the public get confused, and lose interest.
- What are some examples of great campaign messages?
 - Stronger Together
 - Change we can believe in
 - United We Dream

REPEAT, REPEAT, REPEAT

- When you have a strong message, you have to repeat it – everywhere, and all the time.
- Research shows that voters need to hear something SEVEN TIMES before it sticks.
- You need to be saying your message, your volunteers need to be saying your message – it needs to be woven into everything you do.

WHEN THEY GO LOW...

- We go high.
- Sometimes, there is value in going negative, but 9 times out of 10, your strongest strategy is to focus on why your idea or candidate is the best, not necessarily why your opponent or the status quo is bad.
- What are some examples of exceptions to this?
 - Using third party validators like Planned Parenthood to criticize Knute Buehler

QUALITY OVER QUANTITY (BUT NOT ALWAYS)

- The most up-to-date research from the Analyst Institute, a national think-tank that supports progressive campaigns by analyzing mountains of data, suggests that it's less about having a million volunteers having crappy conversations, and more about a smaller number of high-quality volunteers having really good, memorable conversations.
- This is why we TRAIN, PRACTICE, and REPEAT
- Every volunteer needs to be trained, that training has to include practice, and they need to be trained over and over again – every time they call, knock, or write.
- No one is so professional or seasoned that they don't need a refresher – even me!



LEARNING BY DOING

LET'S PRACTICE, AND WORKSHOP
SOME REAL EXAMPLES