

Annotated Agenda: Choosing Advocacy Tactics

Time Allocated: 60 Minutes

Materials Needed:

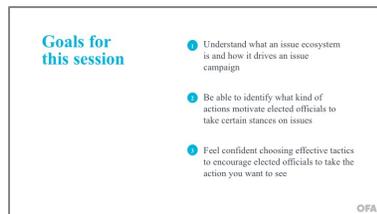
- Annotated Agenda
- Slide Deck

Training Goals:

This session will teach attendees the most effective ways to organize around the issues most important to them. Attendees should understand how the issue ecosystem drive an issue campaign, be able to identify what kind of actions motivate elected officials, and feel confident choosing and implementing tactics.



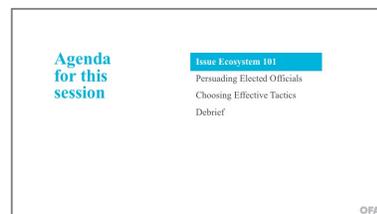
[Slide 1] Cover – Choosing Advocacy Tactics
00:00 – 00:00 [0 Mins]



[Slide 2] Goals for this session

00:00 – 00:01 [1 Min]

- Understand what an issue ecosystem is and how it drives an issue campaign
- Be able to identify what kind of actions motivate elected officials to take certain stances on issues
- Feel confident choosing effective tactics to encourage elected officials to take the action you want to see

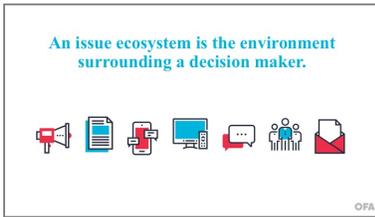


[Slide 3] Agenda for this session

00:01 – 00:01 [1 Min]

- First we will learn about the Issue Ecosystem.
- Then we will cover Persuading Elected Officials and Choosing Effective Tactics
- Then we'll debrief what we've learned

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[Slide 4] Issue Ecosystem
00:01 – 00:04 [3 Mins]

- Elected officials and other decision makers are constantly surrounded by messages from people asking them to take one stand or another on an issue. They receive these messages through a variety of mediums and from a variety of voices.
- Decision makers are surrounded by many issue ecosystems every day. If you and your partner organizations are not part of an issue ecosystem around a decision maker, the opposition is filling that space with their message or the issue is not on the target's radar.



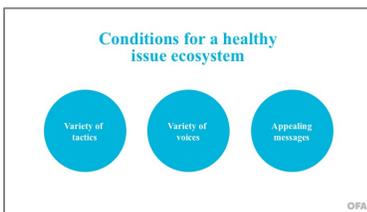
[Slide 5] Goal
00:04 – 00:05 [1 Mins]

- To create the conditions for decision makers to take action on the issue we care about.



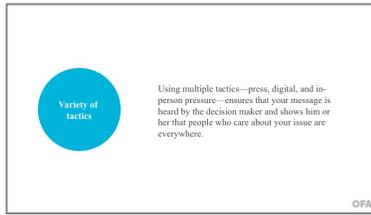
[Slide 6] Our Strategy
00:5 – 00:06 [1 Mins]

- How will we do this? To achieve our goal, we must have a strategy, which is the the right combination of tactics, voices, and messages to make a decision maker take specific action on the issue we care about.
- The tactics, voices, and messages we use must reinforce our strategy.
- For example, let's say our goal is to get a Member of Congress to say that she will protect everyone who received insurance because of Obamacare. Our strategy could be to share stories about how Obamacare benefited her constituents. Then, the tactics we choose must share the stories of how Obamacare benefited her constituents.
- Let's dig into this a little more.



[Slide 7] Healthy Ecosystem
00:06 – 00:07 [1 Mins]

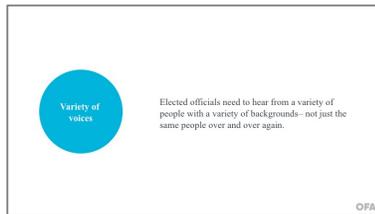
- So, when we think of how we're going to carry out our strategy, we need to think of the conditions that will make for a healthy ecosystem to surround the elected leader we're targeting. This means we need variety in the tactics we choose, the voices he or she hears from, and the messages he or she hears.



[Slide 8] Variety of Tactics

00:07 – 00:09 [2 Mins]

- Multiple tactics ensure that your message is heard by the decision maker and shows them that people who care about the issue are everywhere.
- Additionally, the tactics we choose need to be spaced out. Using all of our tactics at once will bring up the issue for our target once, but not keep it popping up on their radar. We want our issue to pop up on their radar all the time.



[Slide 9] Variety of Voices

00:09 – 00:11 [2 Mins]

- Elected officials need to hear from a variety of people with a variety of backgrounds— not just the same people over and over again.



[Slide 10] Appealing Messages

00:11 – 00:13 [2 Mins]

- All decision makers are motivated by something. It is the job of you and your partner organizations to figure out what that motivation is and how to appeal to it.



[Slide 11] Community Engagement Events

00:13 – 00:14 [1 Mins]

- Now that we know the basics of what an issue ecosystem is, let's dig in on how to operate within one to maximize our chances for elected officials taking the action we want them to take



[Slide 12] Elected Officials

00:14 – 00:15 [1 Mins]

- We need elected officials to vote in certain ways in order to enact the right policy.
- This goes for any level of government— from members of Congress down to city councils
- As such, we need to treat certain elected officials as persuadable voters— but first we need to win their support

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We need elected officials to vote our way.

What motivates them?

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[Slide 13] Elected Officials

00:15 – 00:19 [4 Mins]

- We have to appeal to their motivations. What might some of their motivations be?
 - [Lead the participants in a popcorn discussion about what kinds of things elected officials might be motivated by. Write their ideas in a list on butcher paper/white board at the front of the room. Steer them in the right direction. Below are a few ideas of the kind of track they should be on:
 - Desire to be in the mainstream
 - Desire to be liked by constituents
 - Desire to hold higher office
 - Desire to stand up for strongly held beliefs.]
- These are all great ideas. Now, imagine I'm a state senator and I am particularly motivated by [use an idea from the board], what do I need to be convinced of in order to take the stance you want me to take?
 - [Ask participants for their ideas on this, and take a few comments before revealing the answer. Acknowledge those who were on the right track.]
- That's right – I need to be convinced that taking the stance you want me to take can actually give me that thing that I want.
- And an effective issue campaign is going to create a bunch of different avenues for communicating that point to me.

Meet State Senator David Mendez

Moderate
No previous public statements
Pro-business
Positive, mainstream image in the state
Represents high share of independents



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[Slide 14] Engaging our legislators

00:19 – 00:21 [2 Min]

- In order to demonstrate this, I want you to visualize something with me. Imagine I'm a state senator, and I serve in a state that is often mocked nationally as "backward," which a number of national businesses have threatened to boycott.
- There is a bill on marriage equality coming up for a vote in the state legislature.
- I'm a moderate state senator, and
- I've never made any public statements on this topic.
- I also ran as a pro-business candidate, and I promised to work hard to restore my state's positive image,
- In order to attract businesses and tourism.
- I also serve a district that is made up of 45% Republicans, 40% Democrats, and 15% Independents.



[Slide 15] Letters to the Editor
00:21 – 00:22 [1 Mins]

- The day before the vote, I wake up in the morning and read the newspaper. There, I see a Letter to the Editor titled “Senator Mendez, Marriage Equality will put our state on the right side of history,” where the writer identifies herself as an Independent voter from my district.



[Slide 16] Calls to the legislators office
00:23 – 00:24 [1 Mins]

- Then, he goes into his office, where he gets a morning briefing from his staff. In that briefing, they tell him that yesterday, our office got 245 calls from constituents, with 184 of them in support of marriage equality.



[Slide 17] Social Media
00:24 – 00:25 [1 Mins]

- They also tell me that my Facebook page has been flooded by comments urging me to vote yes on the bill because it will help my state’s economy, with no “anti” comments. I’ve also received 56 @mentions on twitter about the topic, with 48 of them showing a picture of me arm in arm with a very conservative state senator who frequently makes national news for backwards and regressive remarks, asking if I will side with him or with the people.



[Slide 18] Rallies outside the office
00:25 – 00:26 [1 Mins]

- Then, I leave my office to go to a meeting with a constituent group, and as I’m leaving, I see about a dozen demonstrators outside my office chanting “We want equality, it’s good for the economy!” and there is a local news van pulling up to the curb.



[Slide 19] Earned Media
00:26 – 00:27 [1 Mins]

- And then that night when I go home, I see this group in the background on the nightly news. In the foreground, there’s a local business owner giving an interview, citing a statistic that passing marriage equality would bring jobs to my state and that is why he hopes I will vote yes on the bill.



[Slide 20] Putting Issues on leaders radar

00:27 – 00:30 [3 Mins]

- So throughout my day, I have taken in all this data that tells me independent voters support marriage equality, that the majority of my constituents want me to support marriage equality, that marriage equality will help local businesses and the economy, and that the best thing I can do to maintain my image as a mainstream, pro-business moderate is to support it.
- I'd like to pose a question to you: HOW did that information make it onto my radar? [Call on a few participants to share their thoughts.]
- That's right – it didn't happen on accident. It came onto my radar because of the issue organizers out there who worked really hard to make sure that the slice of reality I am experiencing throughout my day actually MATCHES with that bigger picture reality of my district. If the issue organizers in support of marriage equality had stayed quiet, then the issue organizers AGAINST marriage equality would have filled that space with deceptive messages to convince me the best thing I can do to maintain my image as a mainstream, pro-business moderate is to vote against it.
- **Ecosystem metaphor:** We call that slice of reality surrounding an elected official an "ecosystem." It's all about creating the conditions for the outcome that you want. So if you think about a fruit tree as an example: a tree needs a lot of different conditions to line up in order for it to grow and produce a fruit. It needs the right amount of sunlight and water, and needs the right kind of nutrients in the soil – and it needs all of those things in tandem with one another. Even if it gets PLENTY of water, but no sunlight and the wrong soil, it won't grow. Even if that water was the best, most perfectly pH balanced water out there.



[Slide 21] Tactics 1

00:30 – 00:31 [1 Mins]

- We can't just count on one of these methods of communicating to our elected officials if we are going to create an effective issue ecosystem. It can't be JUST Letters to the Editor in the local newspaper, or JUST Facebook comments. It has to be a combination of things that keep popping up onto the elected official's radar on an ongoing basis.

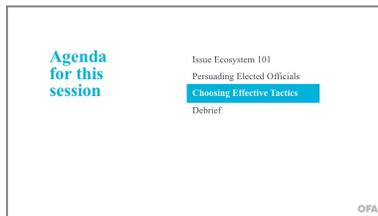


[Slide 22] Tactics 2

00:31 – 00:32 [1 Mins]

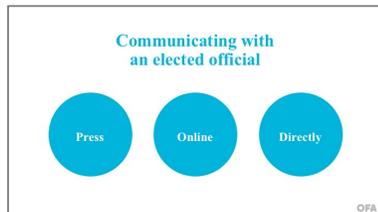
- As an OFA volunteer, you are going to contribute to the ecosystem. You can't create the whole ecosystem on your own – it's going to take a whole coalition of folks to do that. But you will contribute to the issue ecosystem around a Decision Maker.

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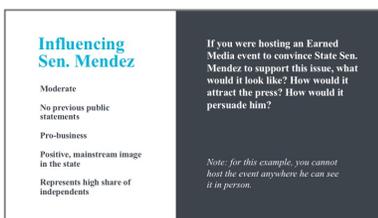
[Slide 23] Agenda: Choosing Effective Tactics
00:32 – 00:32 [0 Mins]

Let’s now dig deeper into the tactics we can use to maximize our chances for elected officials to take the actions we want them to take



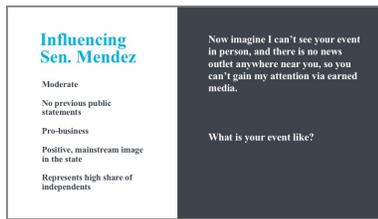
[Slide 24] Communicating with Electeds
00:32 – 00:35 [3 Mins]

- Through the press, Online, And in-person
- In organizing, any time we set out to communicate with an elected official via one of these methods, we call it an action.
- In the example I shared before, what were some of the ways I was reached via the press?
 - [Call on participants to share their thoughts and write answers on the board. Answers should include LTE and Nightly News.]
- What were some of the ways I was reached online?
 - [Call on participants to share their thoughts and write answers on the board. Answers should include Facebook and Twitter]
- What were some of the ways I was reached directly?
 - [Call on participants to share their thoughts and write answers on the board. Answers should include the Phone Calls and Demonstrators Outside My Office]



[Slide 25] Influencing Sen. Mendez 1
00:35 – 00:45 [10 Mins]

- Think again about the basics I shared about myself as an imaginary state senator.
- Now imagine you’d like to get a story published in the local news that convinces me to support this issue. You’ll want to host something we call an Earned Media event. We call it earned media because you are getting media coverage for free on the news – as opposed to paying for an advertisement. The way you “earn” news coverage is by doing something so noteworthy that news outlets actually WANT to do a story on it.
- What kind of event can you hold that would get the attention of the press AND get my attention as your elected official? For this example, imagine you cannot host your event anywhere where I will see it in person.
- You have five minutes to come up with some ideas, and then report back.
 - [If your group is five or fewer people, allow the whole group to work together. If it is more than five people, split people up into small groups of no more than five people each.]
 - [After five minutes have passed, ask each group to describe the earned media events they would plan. Write key notes on the board/butcher paper.]



[Slide 26] Influencing Sen. Mendez 2

00:45 – 00:55 [10 Mins]

- Okay great – now imagine you’d like to get my attention, but there’s no way I will see your event in person, AND there is no news outlet anywhere near you, so you don’t have the method of Earned Media to get me to hear your voice. What do you do then?
 - [Give the group five minutes to work on their ideas.]
 - [After five minutes have passed, ask each group to describe what they would do. Write key notes on the board/butcher paper.]
- These are all great ideas – and it’s okay if it was difficult.



[Slide 27] Agenda: Debrief

00:55 – 00:55 [0 Mins]

- So we’ve learned how and why the issue ecosystem drive an issue campaign.
- Now let’s debrief the things we learned today and identify our key takeaways from this section.



[Slide 28] Debrief

00:55 – 01:00 [5 Mins]

- First of all, what was your biggest “aha” moment? Who would like to share?
 - [Call on 1-2 people]
- Secondly, why do you think this is important?
 - [Call on 1-2 people]
- And finally, what is the next thing you’d like to know in order to decide which part of the ecosystem you want to focus on?[Call on 1-2 people.]