



## Annotated Agenda

### ISSUE ORGANIZING WORKSHOP – Annotated Agenda

**TIME ALLOTTED:** 6 hours 06 minutes

**PRESENTER(S):**

**MATERIALS NEEDED:**

- Projector and PPT
- Speakers
- Flip Chart
- Markers
- Issue Organizing Workshop Workbook
- Sponsor Games Handout- Climate STRONG
- Sponsor Games Handout- Climate Action Now
- Butcher paper for groups to create campaigns (at least 2 pieces)

**GOALS FOR THIS SECTION:**

- Understand best practices and key elements of issue organizing
- Be able to develop a campaign plan for a campus issue
- Feel confident approaching issue organizing in an effective and strategic way

**SKELETAL AGENDA:**

1. **Welcome and Intro**
2. **Issue Campaigns 101: Identifying a goal**
3. **Issue Campaigns 102: Creating a strategy**
4. **Issue Campaigns 103: Planning Tactics**
5. **Sponsor Games**
6. **Debrief and Close**

**ANNOTATED AGENDA**

**0:00 – 0:05 Welcome and Intro.**

0:00-0:05 Introduction of Issue Organizing Workshop

- **[Slide 1]**
- **[Slide 2]**
- **[Slide 3]** Introduce yourself as Trainer: You should give a two-minute version of their personal story as relevant to this module. If possible, try to weave issue organizing. Don't forget to share challenge - choice - outcome and practice it like any other section!

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- 0:05-0:20 Icebreaker
- **[Slide 4-5]** Now we are going to do an icebreaker called, “The Organizer Clap”.
    - Each of us will take one moment to think about 3 words: Your name, where you’re from, and your people
    - We will then go around in a chant – For example: Bobby, Houston, Learners – CLAP!
    - ***Trainers Notes:*** Give everyone in the room a couple of minutes, and then demonstrate it. The idea is to move fast and rhythmically, so you’ll need to point at each person when it is their turn to keep the speed up.
- 0:20-0:24 Goals and Agenda
- **[Slide 6]** Here is a look at our agenda for today:
    - Welcome and Intro
    - Issue Campaigns 101: Identifying a Goal
    - Issue Campaigns 102: Creating a strategy
    - Issue Campaigns 103: Planning Tactics
    - Sponsor Games
    - Debrief and Close
  - **[Slide 7]** We have 3 main goals for today
    - Understand best practices and key elements of issue organizing
    - Be able to develop a campaign plan for a campus issue
    - Feel confident approaching issue organizing in an effective and strategic way
- 0:24-0:28 Your Goals
- **[Slide 8]** What are some individual goals you’re hoping to get out of this workshop?
    - ***Trainer’s Notes:*** Use butcher paper to call on a few people in the group and write down their personal goals for the day (popcorn style).
- 0:28-0:32 Norms and Housekeeping Items
- **[Slide 9]** Parking Lot
    - Before we get started with our next session, let’s set some norms for our training.
    - Today we will use a parking lot to “park” questions we either do not have time to cover or need to investigate the answer, so that we can get back to them later.
    - ***Trainer’s Notes:*** Distribute post-its so participants can write questions for the “parking lot” throughout the day. Your “parking lot” can be a big piece of butcher paper, or a wall corner. Just make sure to label it “parking lot.”
  - **[Slide 10-12]** Organizing Norms
    - **Respect:** Here at OFA we believe strongly in respect for one another. As organizers, we will meet different people with different skills and experiences. And we might have different



work styles or opinions. But we must always be respectful to one another.

- **Empower:** Second, we are all about empowerment. Our organization exists to give people the skills and resources they need to make a difference in their communities and tilt the balance of power from politicians in DC to everyday Americans. As an organizer, you must empower one another to take on leadership roles, and trust one another in taking on responsibility.
- **Include:** Have you ever felt not included? What did that feel like? We want to make sure we all feel included – in our team and as we work with others during the program. If at any point you do not feel respected, empowered, or included, communicate that. As a team, we must feel comfortable sharing with one another when we do not feel respected, empowered, or included.
- **[Slide 13] Housekeeping Items**
  - **Trainers Notes:** *Go over any housekeeping items, such as bathrooms, snacks, water, etc..*

## 0:32 – 1:40 Issue Campaigns 101: Identifying a Goal

- 0:32-0:33 We are now going to begin with Issue Campaigns 101: Identifying a Goal
- **[Slide 14-15]** Review the agenda, as well as tell a quick, 30-second story for why issue campaigns and goals are important
- 0:33-0:35 Goals and Agenda
- **[Slide 16]** We have 3 main goals for this section
    - 1) Understand what issue advocacy is and the key elements to building an issue campaign
    - 2) Be able to identify and select an ideal goal for your issue campaign
    - 3) Feel confident in goal setting and creating a mission for your campaign
  - **[Slide 17]** We will accomplish these goals by following this agenda
    - Issue Advocacy
    - Intro to issue campaigns
    - Establishing your ideal goal
    - Debrief
- 0:36-0:42 Group Discussion
- **[Slide 18-20]** Before we get started, let's hear from you about what issues you care about:
    - **Trainer's Notes:** *Hear from 1-3 people for each question, depending on time (popcorn style).*
    - **1.) What issues do you care about?**



You'll want to steer this discussion into the fact that they are all here because they care about issues and want to make a difference.

- **2.) What are some ways we can impact change on an issue?**

Here you'll want the discussion to funnel into taking action on an issue...going out and doing something about it, on-the-ground and over social media.

- **3.) How do we make sure all these actions are working together?**

Actions need to be coordinated and tied together to make a big difference. And when we are taking action on an issue, we are actually affecting an issue ecosystem.

0:42-0:45 Intro to issue campaigns

- **[Slide 21]** Issue Campaigns/Ecosystems

- "What does a tree need to survive?". Popcorn the question around the room. Then, connect that a tree needs many things to survive and it needs the right conditions in its ecosystem.
- We want to explain that in order to make the change on our issue, we have to create the right conditions in the ecosystem. Just like a tree, in order to grow it needs many different conditions. And, surrounding decision makers is an issue ecosystem.
- Thus, we run issue campaigns to address all of these different things – but first we need to establish a goal!

- **[Slide 22]** Agenda Slide

0:45-0:48 Issue Campaigns components

- **[Slide 23]** An issue campaign has three major components:

- Goal
- Strategy
- Tactics
- Once these three components have been planned, you'll need to go out and build capacity and resources to actually execute your campaign.

- **[Slide 24]** Agenda Slide- So, let's start by talking about how to establish an ideal goal for an issue campaign.

0:48-0:53 Welcome to Everglades College

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- **[Slide 25-26]** For the rest of the day, we'll imagine ourselves as students at Everglades University. This is a fictional campus in the fictional city of Pinedo Point. Take a few minutes and read about Everglades College in your workbooks on **page 1**.
  - **Trainer's Notes:** Give them time to read about Everglades College in their workbooks. After they have read, you want to begin with asking what they learned about Everglades College. Have a short group discussion. Then, move on to review 4 potential goals they as a group could select.
  - What did we learn about Everglades College?
  - Now that you know a little bit more about Everglades College, in our next activity you are going to review 4 potential goals that your group has come up with. There have been four proposals submitted to adopt as the goal for your campaign.
  - **Trainer's Notes:** Read through the 4 potential goals on the screen. Then, move on to the next slide where they will begin their first experiential. Their first experiential will be reading more about these goals. Then, you will lead a group discussion following their experiential on which goal they should select.

0:53-1:10 Experiential 1/A

- **[Slide 27-28]** To start, read through each goal we just reviewed and write down the general strengths and weaknesses that you see in each. This is an individual activity in your workbook on **page 2**. You will have 12 minutes
- **[Slide 29] Debrief:**
  - You've just read about 4 goals that have been proposed by your student group and reflected on the strengths and weaknesses of each goal.
  - **Trainer Notes:** During this debrief you'll want to steer the conversation towards realizing that goals need to be realistic, solve a challenge, and be measurable. Going over these three points is the next section. Important to note that this is not 1 good goal and 3 bad goals. They are all decent and will warrant a good discussion. They will need to think about their goal and make it fit each one of the 3 components.

1:10-1:16 Establishing an Ideal Goal



- **[Slide 30]** These are all decently good goals. But in order for it to qualify as a goal our campaign can champion, it needs to be three things: Realistic, measurable, and solve a challenge.
- **[Slide 31]** This is because it must be a goal that we can realistically achieve and consider a success once we do achieve that goal. It should stretch us and test our limits, but must be within reach.
- **[Slide 32]** And it must solve a challenge, otherwise why have it as a goal on your issue in the first place?
- **[Slide 33]** It must be measurable, in order for us to know when we have actually achieved success. Without well-defined objectives that can be measured, we'll never know if we actually achieved what we wanted.

1:16-1:36 Experiential 1/B

- **[Slide 34-35]** Let's go back through these goals and answer for each if it's realistic, measurable, and solves a challenge. Again, this won't be black and white. You might not be able to have an easy answer. But do your best to be stringent with your answers and we'll discuss as a group afterwards. With your partner, work on this activity. This is on **page 3** of your workbook.
- **[Slide 36-37] Debrief:**
  - ***Trainer's Notes:*** Move to slide 37 so attendees can see all four goals again. They chose and rated one goal on a scale of 1-5 in their workbook during the

1:36-1:40 Debrief

- **[Slide 38-40]** Let's debrief! What are your biggest takeaways so far?

**1:40 – 2:25 Lunch**

**2:25 – 3:38 Issue Campaigns 102: Creating a Strategy**

2:25-2:25 We are now going to begin with Issue Campaigns 102: Creating a Strategy

- **[Slide 41-42]** Review the day's agenda, as well as tell a quick, 30-second story for why issue campaigns and goals are important

2:25-2:28 Goals and Agenda

- **[Slide 43]** We have 3 main goals for this section
  - 1) Understand what a strategy is and how it relates to your issue campaign
  - 2) Be able to create a strategy based on the available knowledge and resources
  - 3) Feel confident in being able to select a strategy that allows you to achieve your campaign's main goal



- **[Slide 44]** We will accomplish these goals by following this agenda
  - What is a strategy?
  - Creating a proper strategy
  - Targeting decision makers
  - Debrief

2:28-2:32

#### Creating a Strategy

- **[Slide 45-48]** A good strategy is the roadmap to success -- it answers the question of how we will achieve our goal.
  - There are three questions we must ask when creating a strategy for issue campaigns:
    1. What institutions have the ability to enact the change you wish to see?
    2. What decision makers will you target?
    3. What messages will you use to motivate these decision makers to action?

2:32-2:40

#### Everglades College

- **[Slide 49]** Agenda Slide
- **[Slide 50]** We are now going back to Everglades college to learn a little more about their decision making apparatus, decision makers, and institutions.
  - Read just **pages 4 and 5 of your workbooks**
  - We will debrief what you read once you're done reading!
  - ***Trainers Notes:*** Give participants about 3 minutes to read pages 4/5, then ask them the questions on the following slides.
- **[Slide 51] Q:** What institutions can we target to pass legislation?
- **[Slide 52] A:** There are two institutions they can target:
  - 1) The Board of Trustees
  - 2) The Student Government Association
- **[Slide 53] Q:** For each institution, in what ways can we pass legislation?
- **[Slide 54] A:** In each institution, they need a simple majority vote, plus approval from the College President, who reserves veto power.

2:40-2:47

#### Targeting Decision Makers

- **[Slide 55]** Agenda Slide- Targeting Decision Makers
  - ***Trainer's Notes:*** The flow here is that in order to make a difference, we need to target decision makers, because they are the ones in power who can make the change we want to see.
- **[Slide 56]** Step 1 is figuring out which decision makers to target.



- **[Slide 57]** Step 2 is understanding that to influence a decision maker, we need to target their self-interests. They will act in the way we want them to act when our goals and objectives are aligned with their self-interests, or when we can create that perception.
  - **[Slide 58]** Step 3 is broadcasting messages to the decision maker that resonates with those self interests--i.e. that our mission is in their self-interest.
  - **[Slide 59]** You should spend some time with the class brainstorming and reviewing the typical motivators and self-interests of decision makers.
  - **[Slide 60]** e.g. reelection, legacy, finances, etc.
- 2:47-3:13 Experiential 2- Identifying Your Decision Maker
- **[Slide 61-62]**
    - ***Trainers Notes:*** *The first section is individually reading and answering the questions. Second 10 minutes is coming to a consensus around these questions. Have them individually read the biography of each decision maker, then spend time as a group analyzing self-interests based on these biographies.*
  - **[Slide 63]** Debrief
    - What are some potential motivators for each decision maker?
- 3:13-3:16 RECAP: Goal sand Strategy
- **[Slide 64]** First we identified a campaign goal. The goal must be achievable, solve a challenge, and be measurable.
    - Your goal is like the keystone of your issue campaign, so it must be well formulated and thought out -- otherwise, the entire campaign will be built on soft ground
  - **[Slide 65]** Then we form the strategy. To form the right strategy we must answer three questions:
    - What institution has the power to make change?
    - What decision makers do we need to influence within that institution to support our goal?
    - What messages do we use to motivate that decision maker based on their self-interest?
- 3:16-3:31 Experiential 3: Selecting Your Strategy
- **[Slide 66-67]** As a group they will now select their campaign strategy, spending 10 minutes answering the following questions on **page 10** of their workbook:



- Will they target either the Board of Trustees or the SGA? They must choose only one. No matter which institution they choose, they will be targeting two decision makers, one from the institution itself (i.e. a board member or student rep) and the College President.
- What messages will they use to influence these decision makers? Here you'll want to make sure they are crafting messages that do actually resonate with the self-interests of the decision makers.
- They will then summarize their strategy in a short paragraph as a group.

3:31-3:38 Debrief

- **[Slide 69]** What strategy did you pick and why?
- **[Slide 70]** What was your biggest takeaway?

### 3:38 – 3:48 Ice-Breaker

- **[Slide 71-73]** Human Rock, Paper, Scissors

### 3:48 – 4:40 Issue Campaigns 103: Planning Your Tactics

3:48-3:48 We are now going to begin with Issue Campaigns 103: Planning Tactics

- **[Slide 74-75]** Review the day's agenda, as well as tell a quick, 30-second story for why this section is important

3:48-3:50 Goals and Agenda

- **[Slide 76]** We have 3 main goals for this section
  - 1) Understand how tactics relate to strategy within an issue campaign
  - 2) Be able to identify effective tactics based on your goal and strategy
  - 3) Feel excited applying what you learned to build an issue campaign
- **[Slide 77]** We will accomplish these goals by following this agenda
  - Tying tactics to strategy
  - Effective Tactics
  - Persuading Decision Makers
  - Debrief

3:50-3:52 What are tactics?

- **[Slide 78]** Tactics are the WAY you CONVEY the message. (not the actual message.)
  - They are strategic actions to persuade decision makers to make the change you want to see.

3:52-4:05 Muhammad Ali Example



- **[Slide 79]** So to demonstrate a really great tactics, I'm going to take us through an example.
  - Who's familiar with Muhammad Ali? (wait for hand response from participants)
  - **Trainer's Notes:** Watch Muhammad Ali rope-a-dope example video (Ali Vs. Foreman 0:40-1:20)
- **[Slide 80] Report Back:** What do you think Ali's goal was in fighting George Foreman?
- **[Slide 81]** How did Ali's tactics reinforce that strategy?
- **[Slide 82] Trainers Notes:** Watch Muhammad Ali describe his tactics, and how that reinforced his strategy

4:05-4:08

#### Effective Tactics

- **[Slide 83]** Agenda Slide- Effective Tactics
  - We've talked a little bit about messages we can use to influence decision makers in our earlier section. Let's take that a step further.
- **[Slide 84]** What are some ways we can influence decision makers and push our message?
- **[Slide 85]** These are all absolutely perfect! AND, these are all tactics. EG: Signature drives, press conferences and rallies, letters to the editor, digital organizing, office visits and phone calls, and speaker series and film screenings
- **[Slide 86]** There are three ways to effectively communicate with decision makers
  - Press
  - Online
  - Directly

4:08-4:13

#### Example: Persuading a Decision Maker Using Tactics

- **[Slide 87]** Let's take the example of David Menendez, a state senator from a fictional state trying to pass marriage equality. He is moderate, has made no previous public statements on this issue, is pro-business, has a positive image in the state, and represents a high share of independents. So in terms of tactics to target him, here are a few examples:
- **[Slide 88] Letters to the Editor**
  - "Marriage equality will put our state on the right side of history." -- This targets his pro-business, positive image, as well as the potential for his representation of independents. The message is crafted and delivered to his self-interests.
- **[Slide 89] Phone Calls**



- If Menendez receives 184 supportive calls vs 61 unsupportive calls on marriage equality from his constituents, he is more likely to think that his constituency values his support on this issue.
  - **[Slide 90] Social Media**
    - Again, social media is another platform to message to Menendez and a part of the issue ecosystem.
  - **[Slide 91] Earned Media Rally**
    - Demonstrations or rallies to show in press coverage to Menendez that his constituents support marriage equality. Of note is the messaging, which target the economy and his pro-business tendencies
  - **[Slide 92] Earned Media- Press Conference/Interviews**
    - By holding press conferences and interviews, you can highlight small business owners or examples of constituents that appeal to Menendez' interests to convince him
  - **[Slide 93]** You have to have a combination of tactics -- creating that issue ecosystem to make sure our message is fully heard by various audiences.
  - **[Slide 94]** A strong issue campaign creates an ecosystem surrounding decision makers -- thus, it is not enough just to utilize one tactics, you should be thinking of how you will target decision makers with multiple tactics, through multiple mediums, with an array of voices. This may mean partnering with other organizations!
- 4:13-4:23 Experiential 4/A
- **[Slide 95-96]** Now, you'll have 10 minutes to plan three tactics for your issue campaign with your group on workbook **pages 11-13**
    - Your goal is like the keystone of your issue campaign, so it must be well formulated and thought out -- otherwise, the entire campaign will be built on soft ground
- 4:23-4:36 Experiential 4/B
- **[Slide 97]** Agenda Slide- Planning your Tactics
    - Explain the importance of sequencing your events. it's important to create the capacity you currently have and what you hope to build up to -- and what capacity each event requires. Some events may target multiple audiences, etc.
  - **[Slide 98]** One tactic alone does not persuade a decision maker.
  - **[Slide 99]** It takes a combination of strategically planned tactics to ensure your message is heard



- **[Slide 100-101] Experiential Activity:** Now, you'll have 10 minutes to sequence your tactics to ensure that they have the most impact with you group on **workbook page 14**.
- **[Slide 102] Report Back:** What are some tactics you planned? How did you sequence them?

4:36-4:40

Debrief

- **[Slide 103-104]** What was your biggest “aha” moment?

#### 4:40 – 4:50 Break

- **[Slide 105]**

#### 4:50 – 5:40 Sponsor Games

4:50-4:55

We are now going to begin with The Sponsor Games.

- **Trainers Notes:** *You'll need to pass out the "Sponsor Games" handout before this section.*
  - *Before starting this section, you should also have decided on pairing groups together.*
  - *Every other group should get a "Climate STRONG" sponsor games handouts, while the opposite group in the pairings should get a "Climate Action Now" sponsor games handout.*
  - *Once everyone has a handout, explain to the group that they are going to be paired with another group of whom they were unable to come to an agreement for a university sponsorship. Thus, they are participating in "The Sponsor Games" **[SEE SPONSOR GAMES HANDOUT FOR MORE DETAILS]***
- **[Slide 108]** Unable to come to an agreement, Professor Sharp and your groups have decided that the best way to select who to sponsor is to judge the strength of your campaign plans through the sponsor games. Each group will pitch a campaign plan, emphasizing their goal, strategy, and tactics to achieve their mission.
- **[Slide 109]**
  - **Rules of the game**
    - You have **25 minutes** to prepare a six-minute pitch of your campaign.
    - You must write the goal, strategy, and tactics on the butcher paper provided.
    - Every member of your team must speak during the presentation.
  - **Judging Criteria: You will be judged on:**
    - Content



- Feasibility
- Group Contribution: Did every Member of Your Group Actively Participate
- Presentation

- **[Slide 110] Agenda:**

- Group Campaign Plan- 25 min
- Group 1 Pitch- 6 min
- Group 2 Pitch- 6 min
- Feedback from Professor Sharp- 8 min
- WINNER IS CHOSEN!

4:55-5:20 Group Campaign Plan Prep

- ***Trainers Notes:*** *Each group will have 25 minutes to prepare. Trainers and facilitators should make sure they have access to butcher paper to write their plans.*

5:20-5:26 Group 1 Pitch

5:26-5:32 Group 2 Pitch

5:32-5:40 Feedback and Select Winner

- ***Trainers Notes:*** *Gathering notes from their presentations, give each group feedback based on the content, feasibility, group contribution, and presentation of their issue campaign and select a winner.*

## 5:40 – 6:06 Debrief & Close

5:40-5:48 Debrief

- **[Slide 113] Magazine Debrief**

- ***Trainers Notes:***

- *To prepare for this activity, have pre-cut images from a magazine(s). These can be random images, including a watch, shoe, sunset, etc...*
- *Lay the images out on a table and instruct participants to pick an image that speaks to their experience during this workshop*
- *As the trainer, select an image as well -- you will go first to set the tone*
- *Once everyone has chosen an image, circle up and have people share how their image expresses their experience with the workshop*

5:48-6:06 Pinning Ceremony

- **[Slide 114] Pinning Ceremony**