



# Activist Toolkit

A crash course in  
effective citizenship

Student  
**PIRGs**

# Together we can make change happen.

It's a good thing, too. Our generation has some big challenges to tackle. It won't be easy, but by acting together we can find solutions.

Since 1971, Public Interest Research Groups (PIRGs) on college campuses around the country have given students a vehicle to protect the environment, serve the campus and the community, uncover consumer rip-offs, and promote good government.

For more than 50 years, the PIRGs have been making a real difference in people's lives and winning concrete changes to build a better world. PIRG students have helped register more than one million students to vote, raised millions of dollars in donations to help the hungry and homeless, and played a key role

in winning reforms to clean our air and water and protect our environment.

In addition, the PIRGs have provided students with an educational experience in democratic citizenship. By bringing important issues to the campus debate, giving students the opportunity to voice their opinions, and teaching students the skills to make their opinions heard, the PIRGs encourage life-long civic engagement.

Along with the idealism, energy, and creativity of the students and staff who make up the PIRGs, much of the PIRGs' success can be attributed to the systematic approach to organizing detailed in this Activist Toolkit. This Activist Toolkit provides the basic tools to run strong campaigns and win victories for students and the public interest.

## Contents

4	<b>Recruitment</b>	28	<b>Grassroots Organizing</b>
6	Tabling	28	Campaign Planning
8	Class Announcements	32	Petitioning
10	Phonebanking	33	Event Organizing
12	Visibility	36	Coalition Building
16	Online Organizing	39	Email Organizing
18	<b>Leadership Development</b>	41	<b>Working with the Media</b>
20	Skills Trainings	45	News Conferences
21	Check-ins & Debriefs	47	News Advisories
24	Individual Meetings	48	News Releases
26	Running Group Meetings	49	Letters to the Editor
		50	<b>Lobbying Decision Makers</b>
		51	Running a Lobby Day





**“Every moment is an organizing opportunity, every person a potential activist, every minute a chance to change the world.”**

Dolores Huerta

**CALPIRG**  
**Students**  
FOR A CHANGE

# Recruitment



Recruitment is the basic building block of any grassroots organization, since you rely on people for power. The more people you have, the more you can accomplish and the more active your community will be. Many of society's problems are fueled by powerful special interests that use money and resources to maintain the status quo. Your grassroots campaign probably can't match their resources, but you can win victories for the public by getting enough people to raise their voices.

However, people don't just materialize. You need to recruit.

Most campus organizations will hold a big recruitment drive at the beginning of each school year. However, recruitment shouldn't stop there. Recruitment is an ongoing part of organizing. You should integrate recruitment into all of your events throughout the year to continually bring new people into your group.

Ongoing, systematic recruitment is inherently political. Beyond increasing your people power, recruitment makes a statement about your organization or campaign: that you are open, not cliquish; that you are dynamic and thriving, not tired or burnt out; and that you are seeking dialogue with the community, not sitting around preaching to the already-converted.

## Reasons to Recruit

- 1 People.** You need a lot of people if you're going to accomplish your campaign goals. Recruitment provides the raw number of people you need to get the job done.
- 2 Grassroots Power.** Recruitment campaigns create visibility for the organization and build your numbers. Visibility and numbers translate into grassroots power. In addition, a big recruitment drive is an opportunity to get a lot of campaign work done.
- 3 Education.** Recruitment campaigns get people thinking about the issues. Recruitment lets you articulate your vision to large numbers of people in an interactive way.
- 4 Training Volunteers.** Recruitment campaigns sharpen your skills and keep you in touch with what people are thinking about. Recruitment drives are an excellent place to teach campaign skills to volunteers.
- 5 Building the Organization.** Recruitment campaigns bring in new members, get people together, and develop a team bond among the participants.



# Principles of Recruitment

- **Reach out to a broad constituency.** Don't rely on people who are already predisposed to get involved. Speak to a wide range of classes and organizations. Don't assume that people will be uninterested just because of the class they're in or the group they belong to.
- **Use many methods of recruitment.** To reach a broad constituency, you need to recruit through a wide range of channels, including posters, tables, classrooms, leaflets, emails, social media, etc.
- **Establish a simple message for recruitment and stick to it.** The message should be both fun and serious: we are fun people who do important work on timely issues.
- **Follow up with new recruits immediately.** Contact them while their interest is fresh and offer them easy ways to get involved. Send text messages to potential volunteers within an hour or two after they sign up, then call them the same night if they don't respond to the text.
- **Always ask volunteers to do more.** Once someone has taken the first step, create new opportunities for involvement and growth. For example, once someone has worked at a table, that person should be asked to coordinate a table.
- **Get to know everyone, and work with the best.** Take the time to get to know new volunteers. Focus your time on volunteers with the most potential for leadership. Find out where they are coming from and where they hope to go.
- **Use other networks.** Reach out to other networks and institutions that have the potential to participate in your efforts, such as student government, the Greek system, environmental groups, etc.
- **Have materials ready.** Posters, leaflets, brochures, and volunteer cards are all important and useful recruitment tools. Make sure that they are available to use for raising awareness and creating visibility.
- **Always be recruiting.** Recruitment is the top priority during the early weeks of the semester, but it is important throughout the year. Include recruitment in everything you do.

“If not us, then who? If not now, then when?”

John Lewis  
Civil Rights leader & Georgia Congressman



# Tabling



Tabling is one of the best tried and true organizing methods. You can table to recruit activists, build visibility for a campaign, get signatures on a petition, distribute literature, and train people to do basic civic work.

“Tabling” doesn’t necessarily involve a table. It refers to recruiting in any situation where people pass by or aggregate—a busy sidewalk, a registration line, the student union, etc. Since you will usually want to set up a table with signs and materials to serve as your base, we use the term “tabling.”

Tabling provides a forum for one-on-one recruitment, but also often grabs people’s attention and draws them over on their own initiative. When a table is set up imaginatively and with flair, it reinforces your organization’s image as credible and active.

Tabling is easy to pull off, in that it takes very few resources and is simple to train new volunteers to do effectively. Tabling is frequently the first activity a new volunteer will do, before diving into more difficult campaign tasks.

## Best Practices for Tabling

- 1 Table in high-foot-traffic areas** like dining halls, the student union, or plazas. Make sure the area is not too crowded – you want the table to get noticed and you want people to have the time to stop and talk. Make sure you have permission to table in that location.
- 2 Table in a variety of places and times** so that you get a good mix of people. Tabling during peak traffic times like class changes or events gives high visibility. Tabling during times when fewer people are around gives you more time to talk to each one.
- 3 Create visuals** that will make your table look attractive and professional – you want to make a good impression. You want to have large banners and posters that tell people who you are and what you’re doing in order to draw their attention.
- 4 Have materials on your table** to show people that your organization is credible and active. Cover your table with fact sheets, leaflets, reports, stickers, buttons, internship info, sign-up sheets, a calendar of upcoming events, etc.
- 5 Create a fun, high-energy table** that will attract more people. Use music, video, and food to make things exciting.
- 6 Spread volunteers out.** Get the more confident tablers to float out into foot traffic to reach more people. Don’t be afraid to go up to people.

## Tips for Tabling

- **Have a friendly greeting.** The friendlier your greeting is, the more likely it is to make people stop. As soon as people are close enough to hear you, make eye contact, have a big smile, and wave.
- **Approach everyone.** The more people you approach, the more of them will stop and talk. As soon as you finish talking to one person, approach someone else.
- **Ask everyone to volunteer.** You'll identify tons of potential volunteers while tabling, but only if you ask everyone. Ask people if you can tell them more about how to get involved in the campaign.

**7** **Invite new volunteers to table.** New people learn by doing. Have new volunteers watch you table for a few minutes, then let them try and give them feedback. When volunteers go out on their own, table nearby so you can give lots of feedback.

**8** **Don't leave a table unattended.** It projects precisely the wrong image and defeats your purpose. A table suggests there should be people there; an empty table suggests disorganization or inactivity.

**9** **Stand in front of the table.** People are less likely to come over and talk to you if you're sitting down. Instead, stand out in front of your table where you can approach people.

## Tabling Raps

You should provide new volunteers with a short tabling presentation, or "rap." A tabling rap includes an intro question to get the person's attention, a description of your organization, and a quick description of the problem you're working on, what you're doing about it, and how the person can help. It should end with a request for them to make a commitment, such as signing a petition, signing up to volunteer, joining your email list, following you on social media, or agreeing to come to an event.

### SAMPLE TABLING RAP

“ Hi! Will you sign a petition to help save the bees?

*What's this about?*

I'm [NAME] with MASSPIRG, the student advocacy group, and we're campaigning to save the bees. Millions of bees are dying off and we rely on them to pollinate everything from coffee to chocolate to strawberries. No bees means no food. We're sending postcards to the Department of Environmental Protection asking them to ban the worst of the bee-killing pesticides. Will you sign?

*OK.*

Thanks! We're working on some other great campaigns this semester, like expanding our use of renewable energy, fighting hunger, and registering students to vote. Would you be interested in being a volunteer or doing an internship?

*Sure.*

Just fill out this card and we'll get you more info on how to get involved.

”





# Class Announcements

One of the most effective ways to reach students on a college campus is to speak in their classes. Many professors will allow you to make a short 3-5 minute presentation at the beginning of class.

Class announcements allow your group to educate students about your organization and campaigns, recruit students for internships and volunteer positions, and build support among the faculty.



## How to Schedule Announcements

- **Choose which classes to target.** Go through the course catalog to identify the largest classes, as well as the classes where the students might be most interested in what your group is working on. It's important to include a wide variety of classes, so you reach a variety of audiences. Make a list of your target classes, along with the name of the professor and where and when each class meets.
- **Send professors a short email message** to ask if you can speak to their classes. Be sure to include who you are, what you want, and how long your announcement will take.
- **If email doesn't work, try other methods.** If your email message doesn't get a response, try sending a second email. When that doesn't work, call professors on the phone or visit them during office hours. For hard-to-reach professors, sometimes the easiest solution is to drop by their class before it starts and ask if you can make an announcement on the spot.

## How to Make a Class Announcement

**1** **Have your presentation memorized.** This will let you concentrate on your delivery. Reading from notes will make your presentation less professional and make your speech sound less natural. After you have your presentation memorized you can start to make it your own and focus on excellent delivery. You need to practice your presentation until you feel comfortable with it.

**2** **Connect with your audience.** Make eye contact as much as possible. This builds trust with your audience. Also, watch your pace. Many people speak rapidly when nervous.

**3** **Nail the logistics.** Arrive at the class a few minutes early. Bring enough materials, especially the volunteer cards or sign-up sheets that you'll use to collect contact info from interested students. If the class is large, ask another volunteer or someone in the class to help pass out the cards/sign-up sheets. As the professor starts class, go through the aisles and pick up the cards, including the blank ones to be reused.

**4** **Have a strong ask and personal appeal.** Be sure to ask people several times to sign the volunteer card. End your presentation with a personal story about why you are choosing to work on this campaign. Personal appeals help people relate to you and also compel them to get involved.

“Speech is power: speech is to persuade, to convert, to compel.”

Ralph Waldo Emerson

## Sample Outline for Class Announcement

### Overview:

Who you are and why you're there.

### Introduction and Your Group:

Your organization, what you do, and any other important information about the group. Mention your group's most recent success or what it's best known for on campus.

### Current Priority Campaign:

- Problem: Why your group is taking on its current campaign.
- Solution: What your group is doing about the problem.
- Plan: Your campaign's upcoming events and tactics.

### Ask:

Explain the ways that students can get involved and ask them to sign up.

### Other Issues:

Quickly mention any other projects or campaigns your group works on.

### Personal Story:

Why you got involved.

### Wrap-up & Thanks:

Thank the class for their time and attention.

# Phonebanking

As soon as a student has expressed interest in getting involved by filling out a volunteer card, you need to call them. Assuming they signed up through a table or class announcement, the interaction was probably quick and didn't involve much conversation. Your phone call can help you make a personal connection with a new volunteer and compel them to get involved.

Students who fill out volunteer cards want to know more about the organization and how they can get involved. Don't disappoint them. Contact them quickly, while their interest is fresh. You should also reach out to them through email and texting, but talking to them on the phone is the most effective way to get a new volunteer involved in the organization.



Since you will be collecting a lot of volunteer cards during the recruitment drive, you may need to set up phonebanks several times a week, where groups of volunteers will get together and call all of the new people who filled out volunteer cards.

You will usually use phonebanks to invite new people to volunteer. However, you can also organize phonebanks to invite back past volunteers or invite people to attend an upcoming event.

## Running a Successful Phonebank

- 1 Have a plan.** Set your goal for the number of new volunteers you need, then figure out the number of hours you will need on the phone to call and recruit those volunteers.
- 2 Sign up volunteers and coordinators.** Have phonebank volunteers sign up for one-hour shifts. There should be coordinators for each shift and for the night overall.
- 3 Train your volunteers.** Everyone should go through a quick but thorough training before they begin calling.
- 4 Make the phonebank fun.** Play music, bring candy, create contests, or find other ways to keep people excited and motivated.
- 5 Prioritize your list.** Call the most recent and most interested contacts first.
- 6 Coordinators should check in on volunteers periodically.** Listen in and give them feedback and encouragement.
- 7 Challenge people to do more.** As volunteers finish their shifts, quickly speak with them about their experience and performance and ask them to sign up again – and to coordinate a shift next time.



## Best Practices for Phonebanking

- **Be friendly and connect with people.** People get involved with a campaign because they care about the issue and they like the people they might work with. Take time to get to know them and connect with them on why they were interested in volunteering. Smiling while you talk is also an easy way to be friendly over the phone. The person is more likely to volunteer if you have a good conversation with them.
- **Have a clear and specific ask.** Know the volunteer activity you want them to join. Have a clear description of what they would do and when they should be there. Ask confidently if they can volunteer and get a clear commitment. If they can't come to that event, invite them to other upcoming events or let them know you'll call again in the future. You can expect half the people you call to be free for an upcoming volunteer shift and to commit to attending for a specific time - but only if you give them all the details and have a direct ask.
- **Double-dial and just keep dialing.** Like many aspects of organizing people, phonebanking is a numbers game. The more numbers you dial, the more people you'll talk to. It's typical for half or less of the people you call to pick up so keep that in mind and just keep dialing. You can expect to talk to anywhere from 5 to 8 people in one hour of calling, if you dial diligently and keep your conversations to 5 minutes or less. Many people won't pick up calls from an unknown number, so you should double-dial them to increase their likelihood of answering.
- **Text the people you didn't reach.** At the end of each phone shift, send text messages to everyone who didn't answer the phone. Texting gives you one more chance to reach these students, plus some students are more responsive to texts than phone calls.

## Sample Phone Rap

“ Hi! My name is Frank. I'm calling from MASSPIRG. Is [NAME] there?

Hi. How are you doing?

I got your name from a card you filled out in Professor [NAME]'s class today, and I was calling to let you know how you could get involved. Do you have a couple minutes to chat?

First though, I was wondering what interested you about MASSPIRG and our campaigns? [Connect and get to know the person. Ask follow-up questions.]

Well, as you heard in class, we're working to save the bees. Millions of bees are dying off and we rely on them to pollinate everything from coffee to chocolate to strawberries. No bees means no food. So MASSPIRG is working to convince the Department of Environmental Protection to ban the worst of the bee-killing pesticides.

We need to get a lot of people involved in order to win the campaign, so tomorrow we'll be setting up a table on the student union plaza, handing out information about what we're doing, and asking people to get involved.

We'll be out there from 10-2. Do you think you could help out for a couple hours in that time?

Great! [Confirm the time.] Just show up a couple minutes early and ask for [COORDINATOR'S NAME]. She will be coordinating the event.

Any questions? It was good talking to you! Have a great night, and we'll see you at [TIME] tomorrow on the plaza. Bye!

”



# Visibility



Visibility builds your organization's credibility, tells people who you are, and demonstrates that your group is worth supporting. It informs the campus about your group's accomplishments, increasing your reputation as a group that gets things done.

Visibility also sets the stage for students to get involved in your campaigns. Good visibility makes recruitment easier—as people see your publicity around campus, they become more likely to sign up when your recruitment drive approaches them.

## Tips for Visibility

- 1 **Be creative.** The goal is to be the coolest and most noticeable thing on campus.
- 2 **Document it.** Take photos, shoot video, etc. If you've created something cool, you should document it. Plus, you can use those photos and videos to create visibility on social media.
- 3 **Ask everyone to help.** Visibility is one of the easiest things to do, especially for new volunteers. Always be looking for ways to get more people involved. When you recruit a new volunteer, give them a stack of posters to hang up in their dorm. When someone fills out a volunteer card, hand them a flier with 3 ways they can help right away, like chalking all the classrooms they go to, wearing a t-shirt or a wristband, or handing out fliers to all of their friends.
- 4 **Know the limitations.** Visibility cannot replace one-on-one interactions like tabling and phonebanking. Passive visibility by itself won't fill the seats at an event. The point of visibility is to get your story out there and build a buzz around all the amazing work your organization is doing.

## Principles of Visibility

- **Know your audience.** Figure out what positive message appeals to the widest range of people in your audience. Keep your message clear and simple.
- **Promote your activities.** Use visibility to promote meetings, events, reports, accomplishments, service projects, and your campaigns. Campus-wide events like Earth Day, career fairs, and voter registration drives are great visibility opportunities.
- **Use a wide range of visibility types.** Reach a wide range of audiences by using many different forms of visibility.
- **Know the rules.** Some campuses have restrictions on where you can hang posters, where you can set up tables, etc. Make sure you know the rules and follow them.

# Types of Visibility

When you're trying to be visible, the sky's the limit. Here are a bunch of visibility tactics that you can try. You should also get creative and come up with some new ones.

## CHALKING

- On chalkboards
- On sidewalks
- On the side of a building (check the rules first, though!)
- On busy street intersections
- Along paths to campus so people see it on their way to school

## ANNOUNCEMENTS

- In classes
- At group meetings
- In dorm hall meetings

## HANG POSTERS

- On bulletin boards in classrooms, hallways, outside, etc.
- In your office windows
- In dorm windows
- On dorm room and apartment doors
- Inside bathroom stalls
- In the bookstore
- In local cafes, bars, grocery stores, etc.
- On telephone poles
- On outdoor kiosks
- In dining halls

## SEND AN EMAIL

- To faculty
- To your organization's email list
- To campus club lists
- To departmental lists
- To the whole school (often can be done through the student government)
- To local community organizations
- To dorm hall lists

## PUT UP A BANNER

- In large lecture halls
- In the dining halls
- In each dorm entrance
- In the campus union
- In office windows

(Continued)







## SOCIAL MEDIA

- Have your volunteers and coalition partners post using the same hashtag(s)
- Ask everyone share the same post on their stories
- Tag volunteers and coalition partners in posts

## FLIERS

- Tape behind chairs in lecture halls
- Hand out on street corners
- Hand out on the campus quad
- Tape to bicycles
- Put on car windshields
- Put "table tents" in the dining halls or local eateries
- Hand out outside of huge halls when classes are changing

## TABLING

- Have a big sign or prop
- Have cool costumes - superheroes, animal suits, anything that grabs attention
- Have a big banner or prop people can sign
- Hand out buttons, wristbands, water bottles, candy, etc., with your message on it
- Have a ton of volunteers wearing matching campaign t-shirts

## STUNTS

- Flash mobs
- Conga lines
- "Honk for \_\_\_\_" at a busy intersection
- Get volunteers to all wear the same thing (bright shirt, ribbon, etc.) on the same day with your message boldly displayed

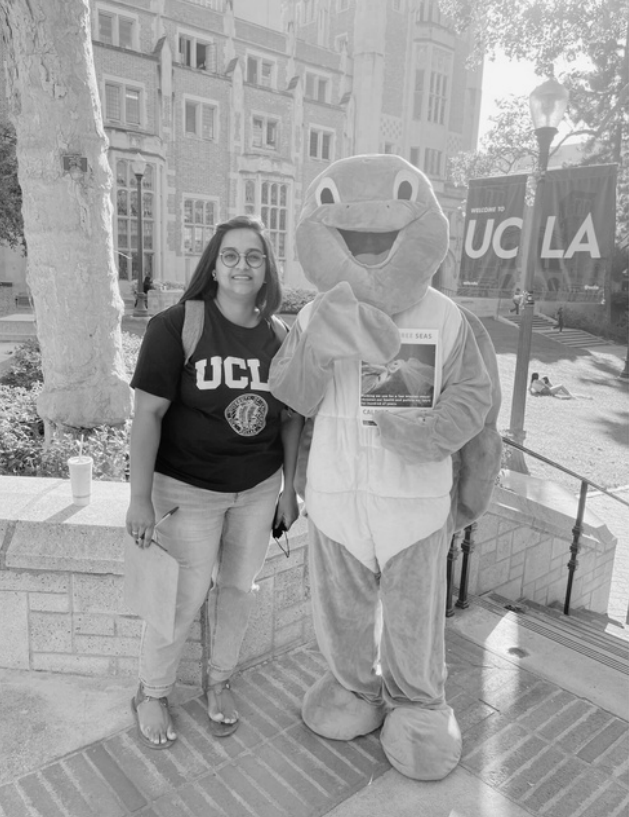
## WEBSITES

- Post events to online campus calendars
- Post info on your website
- Get local bloggers to cover your event or campaign
- Get local sites to link to your group

## CAMPUS MEDIA

- Submit letter to the editor
- Submit op-ed
- Send news release
- Hold news conference
- Invite to an event
- Get campus paper to donate ad space for a campaign message





# Online Organizing

The internet provides countless tools for promoting your organization and inviting new people to participate. Face-to-face is still the most effective way to recruit new members, but you should also have a plan for using online tools, including email lists, websites, and social media.

## Principles of Online Organizing

- **Grow your online contact lists.** Make sure to collect email addresses from everyone you interact with and add them to your organization's email list. Expand your reach on social media by encouraging people to like and follow your organization's profile pages.
- **Build your relationship with key players.** Remember that picking up the phone or having in-person meetings is almost always better than sending an email or text message. However, use email and social media to follow up and cement your relationships by saying thanks, sending personalized campaign updates, letting people know you saw something good they did, etc.
- **Leverage the online presence of others.** You can dramatically extend your reach and impact by collaborating with partners who have a strong online following. Make sure to acknowledge and highlight their contribution.
- **Connect your online and offline efforts whenever possible.** When a new volunteer works at their first event, ask them to post a photo on their account. At big events, ask attendees to post about it and give them a hashtag to use.
- **Extend the life of your successes.** Increase the visibility of your victories by capturing and sharing these moments online. Make the most of events by posting before, during, and after they happen.
- **Provide recognition to your supporters.** Thank your leaders, volunteers, and partner organizations. The more you give credit to your people for your campaign's successes, the harder they will want to work for you and the campaign. When you succeed, give others the credit. When things go wrong, take responsibility yourself and figure out how to improve.
- **Provide value by posting great content on a frequent basis.** Content is king. Come up with compelling content that your supporters and partners will be excited to read and share.
- **Foster conversations.** Don't just broadcast out your message over and over, always asking for actions and favors. Develop a two-way relationship with your online community. Promote good content posted by others and ask your followers for feedback and input.
- **Build for the long-term.** Keep in mind that the people you are working with – students, faculty, groups, etc. – will increase in power and influence over time. Cultivate these relationships now.
- **Use the tools that will make the biggest impact.** There are too many online tools for you to use all of them all the time. Figure out which tools will make the biggest difference for your campaign and focus on those. If a particular social network isn't going to help you win your campaign, ignore it and instead spend your energy somewhere it can be useful.



## Tips for Online Organizing

- 1 Find out the lay of the land.** Ask around to learn what people in your community are already using to communicate and organize. Whether it's hashtags or subreddits, using what already exists can help you get connected in the community.
- 2 Only start an official account if you're ready to invest in it.** Whether it's Instagram, TikTok, or Twitter, if you decide to start an official account for your group, make sure you are ready to keep it updated.
- 3 Post quality content and ask your supporters to share it with their friends.** Generate a steady stream of pictures, videos, breaking news, campaign updates, and other content that people will find valuable and worthy of passing on.
- 4 Follow and engage with the most influential accounts.** Prioritize groups and accounts that have the most followers, since they can do the most to build your own following. This can range from your campus's official accounts to the biggest meme accounts.
- 5 Promote your official accounts.** Link to them from your website and in email messages. List it on your campaign materials.
- 6 Ask supporters for input** and ideas about campaigns and events.
- 7 Use hashtags.** Use relevant hashtags in your posts to increase engagement.
- 8 Track your progress.** Use the analytics from your accounts to track the growth of your likes, visits, etc.

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## Protecting Your Online Reputation

### **When you are online, you are always a public figure.**

Ensure that your profile and related content—photos, posts, tweets, messages—are consistent with how you wish to present yourself as a student leader. Use common sense and remember that everything you post can be associated with both you and your organization. Don't assume that private posts and messages are safe—these can end up being reposted for the public.

### **Always exercise discretion, thoughtfulness, and respect.**

If you would not say it in public, do not write it. Don't use slurs, personal insults, obscenity, or engage in any conduct that would not be acceptable in the classroom or in a public place. Show proper consideration for others' privacy and for topics that may be considered objectionable or inflammatory. If in doubt, don't post it.

# Leadership Development



You'll always want to have tons of volunteers, but unless you also have a lot of leaders, your organization won't be as effective. Leaders are the people who not only participate in campaign activities, but also take on the responsibility for planning events, coordinating logistics, and preparing and training other volunteers. Not everyone will choose to be a leader, but by recruiting lots of volunteers and giving everyone the opportunity to take on leadership, you'll find the leaders that you need.

Leadership development is the essence of organizing – it's about helping build up the people in your group to the point where together your group can get far more accomplished than if you just did everything by yourself.

Moreover, your campaign is tackling big problems and there is lots of work to do. You need leaders if you want to be successful. In order to work effectively on a large campaign and coordinate all the volunteers you will have, you need to develop leaders from within your ranks. Plus, students graduate, so you need to constantly be replacing yourselves. You need people who can step up and do your job when you're gone.

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## The Leadership Ladder

The leadership ladder is the chain of activities that moves a volunteer from doing basic volunteer tasks up to taking on more difficult leadership opportunities. The ladder makes leadership opportunities more accessible by breaking them down into relatively small steps. Each volunteer will have different skills and interests, so each will end up following a different leadership ladder.

The most common first step up the leadership ladder is for a new volunteer to complete a volunteer task and then coordinate other people doing the same task. For example, after a successful stint at

a tabling event on Monday, a volunteer might be asked to coordinate a tabling event for an hour on Wednesday. If the volunteer is willing to take on even more responsibility, they could help recruit additional volunteers for the next tabling event or take responsibility for creating the visuals for the table.

Once a student has started up the leadership ladder, talk with them at debriefs and individual meetings to gauge what their next level of involvement should be. Any time a volunteer takes on more responsibility or a more challenging activity, they are taking a step up the ladder.

## Principles of Leadership Development

- **Look for leadership potential in everyone.** Anybody who supports your campaign might be interested in getting actively involved. Anybody who gets involved once has the potential to take on more.
- **People who care about the issues need to be motivated to act upon their concerns.** Most people don't know what they can do to make a difference or how their actions will help. You need to communicate that there are solutions as well as problems.
- **Create opportunities for people to take on more responsibility.** It is hard for a new volunteer to know what next step to take. You need to develop a leadership ladder for each person, giving them opportunities to continue to learn and grow.
- **People stay involved because they feel challenged personally and because their efforts are making a difference.** Once somebody masters a basic task, they should be given something more difficult to tackle—either training other people to do the basic task, or dealing with a more challenging situation themselves.
- **People take on more responsibility because they feel needed.** If you need a person to do more, you need to tell them that. People need to know that you're counting on them. After each activity or event, you should be talking to volunteers about their next activity.
- **People develop as leaders because someone takes the time to give them meaningful feedback and build their confidence.** Once a task has been completed, don't just assign another one – stop and talk about how it went, what could have gone better, which pieces went well, how they felt about the experience, etc.
- **People stay for the long term because they feel like part of a community.** Develop a group culture that is fun and supportive and that encourages people to get to know each other.

“Leaders aren't born, they are made. And they are made just like anything else, through hard work.”

Vince Lombardi

## Common Leadership Positions

### Campaign Coordinator:

Oversees all aspects of the campaign, including management of other coordinators.

### Recruitment Coordinator:

Oversees recruitment and development of new volunteers, including tabling, phonebanking, visibility, and training.

### Grassroots Coordinator:

Oversees grassroots tactics such as petitioning and call-in days that require extensive public outreach.

### Coalition Coordinator:

Oversees partnerships with other organizations and VIPs.

### Media Coordinator:

Oversees outreach to news outlets to promote the campaign and generate media coverage.

### Event Coordinator:

Oversees all aspects of a single event, including recruitment, visibility, and logistics.



# Skills Trainings

Training sessions help you deepen people's investment in your campaign. Participants gain the skills they need to carry out campaign responsibilities effectively, while also learning about the larger vision of what is being accomplished by the campaign and your organization.

## Principles for Skills Trainings

- 1** **Hold trainings on a regular basis.** You will constantly have new volunteers coming into your organization who need to be trained. During the recruitment drive, you will need to hold training sessions frequently.
- 2** **Formal trainings require preparation like any other event.** Big trainings should be organized just like any event, including advance planning, publicity, recruitment, and logistics.
- 3** **Not all trainings need to be formal.** Some skills, like tabling and phonebanking, are simple enough that you can teach them on the spot. With these activities, you can run quick trainings for new volunteers at the beginning of their volunteer shift.
- 4** **Everyone has more to learn.** Hold advanced training sessions for your more experienced members, such as your campaign coordinators. By providing them with training on more advanced skills, you will rapidly increase your group's depth of expertise.
- 5** **Simple, sample, practice.** That's the basic outline for any good skills training: provide a simple overview of the skill, demonstrate a sample of the skill in use, and then have trainees spend most of the training practicing the skill.
- 6** **Roleplays should take up most of the training.** Practice makes perfect, so spend most of the training letting trainees practice the skill. Start the roleplays by setting goals for the attendees for what they should accomplish. The trainer should check in with trainees during the roleplays to give quick feedback and encouragement. After the training, debrief with each trainee about how the roleplays went.

## Sample Training Agenda

- Introductions
- Describe the campaign and why your group's work is important
- Explain why the skill you will be teaching is important
- Review the skill
- Give an example of the skill – demonstrate it
- Set goals for the activity and lay out expectations
- Do roleplays – these should take up the bulk of the training
- Wrap up

# Check-ins & Debriefs



Each time you involve someone in your group's activities, you have the opportunity to increase that person's ability and interest in continuing to work on your campaign. To maximize this opportunity, you should build in the time to check in with each student while they volunteer and to debrief them when they finish an activity.

A check-in is when you provide a volunteer with a quick piece of feedback during the middle of their volunteer shift. These brief interactions help to keep volunteers on the right track. If a volunteer is doing well, then the check-in is a chance to provide encouragement and motivate them to perform even better. If a volunteer is struggling, then the check-in can help them adjust their approach and finish their volunteer shift on a strong note.

Similarly, a debrief consists of a quick evaluation of the success of an activity, conducted immediately when the activity is completed. A debrief might be done one-on-one with someone who just completed a volunteer activity, or it might be a group debrief with your whole organization after holding a big event.

Check-ins and debriefs are tools which you can use to train, recruit, retain, and manage your organization. They provide a way to connect with people and provide them with context for interpreting their volunteer experience.

Debriefs are usually longer interactions, since they occur at the end of an activity. Many first-time volunteers won't be sure whether they were successful in carrying out the task they were assigned. The debrief is an opportunity to congratulate volunteers on what they did well, or to give them a morale boost and provide feedback on what they can improve on next time.

For example, a new volunteer who just petitioned outside a store may need reassurance that it is common for shoppers to ignore a petitioner. They also may need feedback on how to grab people's attention more effectively in the future. Finally they may need overall reassurance that petitioning is an important strategy in the overall campaign.

In addition, for volunteers who performed well, the debrief is a good opportunity to challenge them to take on more responsibility.

## Holding a Check-in

- **Check-ins should be part of every volunteer activity (tabling, phonebanking, etc.).** If you are coordinating a volunteer activity, you should plan to make one or two rounds of check-ins during each shift.
- **Check-ins should be quick, from one to three minutes.**
- **Observe the volunteer's performance.** You should perform the same volunteer activity from someplace nearby — close enough to hear and see the volunteer in action, but far enough away not to disrupt their work. Observe them just long enough to assess their performance.
- **Give feedback, then demonstrate.** If the volunteer is struggling, give them one piece of specific feedback on how to improve. Then show them how to do the activity properly, making sure to emphasize the skill that you told them to work on.
- **Leave them with positive momentum to finish out their shift.** When the check-in is over, the volunteer should have a clear understanding of which skill to work on and how far they have left to reach their goal. Encourage them to finish strong.

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### SAMPLE OUTLINE FOR CHECK-IN

**Observe:** Watch the volunteer discretely for a couple minutes as they perform the activity.

**Icebreaker:** Ask a general question about the activity.

"How are things going so far?"

**Review:** Ask a specific question about how they are doing.

"How many signatures do you have so far?"

**Feedback:** Based on your observations, give them one piece of simple feedback.

"You're doing most things well, but you'll get more people to stop if you give them a wave and a smile and start talking to them when they're about ten feet away. That gives them time to consider and stop before they walk past you."

**Demonstrate:** Perform a demonstration of the feedback you just gave.

"For the next person who walks by, I'm going to show you how I greet them."

**Practice:** Have the volunteer practice implementing your feedback a couple times while you watch.

**Reinforce Goals:** Remind them of their goal for the volunteer shift.

"You need eight more signatures to hit your goal."

**Wrap Up:** Give a final note of encouragement.

"Keep up the good work!"



## Holding a Debrief

- **Debriefs should be built in at the end of every activity and event.** They should become so routine that your volunteers would never think about leaving before participating in a quick debrief on how things went.
- **Debriefs should be brief, from one to five minutes.**
- **Debriefs should be clear and specific.** Let the volunteer give his or her explanation for what happened before you give yours. Compare their actual results to the goals. Feedback should focus on one or two problems, no more. This allows the volunteer to accept the feedback and to have the confidence that they can do the task again. Use demonstrations and roleplays to show them what to do differently.
- **Debriefs should always end on a positive note,** giving the person feedback that by changing just one thing, they will excel at the task.
- **Debriefs should end with an invitation.** Ask the person to participate in an upcoming activity.
- **Debriefs are not the time to get into deeper issues about the person's role in the organization.** The debrief should be a quick assessment of how things went. Schedule a time to meet later to discuss weightier matters.
- **Also debrief coordinators.** In a big campaign with lots of people involved, coordinators of activities should debrief their volunteers, then the organization's leaders should debrief the coordinators.
- **Use debriefs as an opportunity to reinforce goals.** The emphasis should be on how the volunteer performed in comparison to their goals, rather than just how they felt about the experience.
- **Use your own experience.** Sharing your personal story reminds the volunteer that you've been through what she or he is going through.

## Sample Outline for Debrief

**Icebreaker:** Ask a general question about the activity.

"Did you have fun?"

**Review:** Ask a specific question about how they did.

"How many signatures did you get?"

**Evaluation:** Why did they do well or not do well?

"Great! What worked for you?" or "That's fewer than most people got. What do you think went wrong?"

**Next Step:** Decide what they are going to do next.

"You did really well. What I would like to do is have you coordinate the petitioning at the union tomorrow. How does that sound?" or "You'll find it gets easier the more you do it. What I would suggest is that you come in for the training session on petitioning tomorrow at 4 p.m. We are going to do a lot of roleplays to give people practice. How does that sound?"

**Wrap Up:** Give a final note of encouragement and thanks.

"Thanks for all your help—we're really going to win this campaign with all of these signatures."

# Individual Meetings

While most recruitment is done through wholesale outreach – speaking to classes, tabling passers-by, etc. – true organizing happens on an individual and personal basis. Individual meetings are your opportunity to transform new recruits into motivated activists and leaders.

In an individual meeting, you work with a student to answer questions, further their interest in the campaign and the organization, develop personal rapport, and deepen their level of commitment. In a successful meeting, you will be able to find out what motivates a new volunteer, create common ground, and develop leadership opportunities for them.

You should hold an individual meeting with each new recruit shortly after their first volunteer experience. It is at this point in the leadership ladder that a new recruit is likely to have lots of questions about what you're doing and why, and be wondering how or where they can fit into the group's efforts.

You should also hold individual meetings with your top leaders each week so that you're constantly checking in with them, building your relationships with them, and advancing their involvement.

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## Holding an Effective Individual Meeting

In order to be an effective leader and hold productive individual meetings, you need to be:

- 1** Knowledgeable about the campaign and the organization.
- 2** Enthusiastic about what the organization is doing and why you are doing it.
- 3** Sincere about why you are involved and why you want others to get more involved.
- 4** Confident about what you're doing without being overbearing.
- 5** Perceptive about what the volunteer is saying and how they are reacting to what you're saying.
- 6** Able to build rapport and put a new recruit at ease.
- 7** Creative about developing opportunities for new volunteers to get more involved in the campaign.

## Sample Individual Meeting Agenda

- **Intros:** You should tell each other about your respective backgrounds, issue interests, activities, etc. Look for opportunities to build common ground and listen for clues about their motivation and level of commitment.
- **Chit-Chat:** Try to bring the person out of their shell. Find out about their motivation, what you have in common, etc.
- **Share information:** Give a brief update on the campaign and organization and make sure the volunteer knows what the group is doing and why.
- **Answer questions:** Make sure that questions and concerns are addressed. If necessary, think of ways to draw the person out.
- **Describe opportunities for involvement:** Based on what you've learned about the person and what needs to get done, this is your opportunity to pitch a level of commitment and activity tailored to this individual volunteer.
- **Determine interest and commitment level:** Based on their reaction to the opportunities you described, figure out how much this volunteer is willing to do, what their abilities are, what their level of confidence is, etc.
- **Reinforce interest and motivation:** Use what the volunteer has said and your own interests to build rapport and provide context for the agreed-upon activity.
- **Bring specific activity back to the bigger picture:** Reinforce the context of what you're doing and why. Explain where their next activity fits into the campaign plan and why their participation is important.
- **Answer any additional questions:** Be sure the person has confidence and enough info to move forward. Listen for and address any buried fears.
- **Set up follow-up:** Schedule when and where you'll meet next. Let them know where to call with questions, who else will be in touch, etc.

## Preparation Checklist for Group Meetings

- ☐ Have you set concrete, realistic goals?
- ☐ Is the location familiar, accessible, and adequate?
- ☐ Do people know how to get there?
- ☐ Do you have a meeting facilitator? Have they helped prepare the agenda or been fully briefed?
- ☐ Have you spoken with all those who will play a part in the meeting to see if they are prepared?
- ☐ Have you given appropriate people a chance to have input on the agenda?
- ☐ Do you have a turnout plan and enough people making confirmation calls?

### Does the agenda:

- ☐ Accomplish the goals?
- ☐ Encourage commitment?
- ☐ Provide visible leadership roles?

### Have you asked people to serve as:

- ☐ Facilitator?
- ☐ Note-taker?
- ☐ Timekeeper?
- ☐ Guest speaker?

### Have you prepared:

- ☐ Chairs and tables?
- ☐ Whiteboard/butcher block?
- ☐ A/V equipment?
- ☐ Sign-in sheet?
- ☐ Sign-up sheets for tasks?
- ☐ Background materials?
- ☐ Proposals?



# Running Group Meetings

During the course of your organizing there are many reasons to have (or not have) meetings. Before planning a meeting, you should be sure that you need one, that you know what you want to accomplish, and who will be involved in accomplishing it.

Meetings are generally the best forum for making group decisions, developing a group plan, delegating responsibilities to a group, and building a sense of accountability and community.

If your goal is to disseminate information without getting input, train an individual in particular skills, or give a particular student feedback on their work, a group meeting may not be your best option.

## Planning a Meeting

- **Before organizing a meeting, make sure you need one.** Once you have decided that it is appropriate to have a meeting, you need to prepare for it. This includes:
  - Defining the goals
  - Preparing an agenda
  - Developing a list of attendees
  - Identifying someone to facilitate the meeting
  - Preparing the facilitators and attendees
  - Anticipating pitfalls
  - Planning an opportunity to debrief with meeting leadership
- **Figure out the logistics.** The logistics of a meeting often dictate whether the meeting will be successful. Consider the following:
  - Is the location easily accessible? Is the time convenient? Can you avoid conflicts with classes, other meetings, etc.?
  - Is the room the right size for the group? (It is always better to have lots of people in a smaller room than to have too few people in a large room.)
  - Are the chairs set up so that it is easy for people to see?
  - Is there a chalkboard, whiteboard, or butcher block for brainstorming?
  - Is there a sign-up sheet?
  - Are there materials for people to take?
  - Are there refreshments or a plan for post-meeting socializing?
  - What is the scheduled duration of the meeting?
- How will you ensure that people show up for the meeting (confirmation calls, etc.)?
- **Know your goals.** The agenda should serve two basic functions: enable your group to achieve the meeting's goals and create an atmosphere that makes attendees comfortable. Figure out which decisions or discussions need to take place at this meeting.
- **Plan your follow-up before the meeting.** No matter who is at a meeting or what decisions are made, every meaningful meeting requires follow-up. Before the meeting, make sure that there is a plan and timeline for following up on the decisions that will be made and tasks that will be delegated.
- **Prepare all participants.** Everyone coming to the meeting should have a basic sense of the goals of the meeting, how everyone will participate, and who else will be in attendance. The people facilitating the meeting will also need to have a sense of all of the possible outcomes. In addition, the facilitators should have a sense of what needs to be done coming out of the meeting and who at the meeting is best suited to do each task.
- **Anticipate pitfalls.** The only way to ensure a smooth, well-run meeting is by anticipating problems and developing solutions before the meeting occurs.

The most difficult part of running a successful meeting is dealing with group dynamics. The meeting facilitator needs to feel comfortable in that role. They may need to encourage some people to speak while discouraging others, lay out their own opinion, or solicit input from the group.

The facilitator is responsible for making all participants feel comfortable, as well as for making sure the meeting accomplishes its goals within the time available.

Another common problem with meetings is the tension between giving attendees the opportunity to participate and have input, while still following through on plans developed prior to the meeting. To address this, first, do not create a false sense of power. Participants in a meeting should only be asked to brainstorm or offer input into decisions which they can truly influence. It is better to lay out a decision that has already been made and ask for appropriate feedback than to pretend that a decision is about to be made and ask for input which will be disregarded.

Second, provide adequate context to any decision or discussion taking place in the meeting. If people know how, why, and by whom a decision has been made, they will be able to understand where they fit into the process and what real input they can have.

**Debrief after the meeting.** Everyone who helped organize the meeting should participate in the debrief. Stick to critiques of the meeting itself — feedback to an individual or small group should be done privately. The meeting debrief is used to assess a number of factors:

- Was the agenda appropriate?
- Did your key group members attend the meeting?
- Was anyone missing?
- Were the facilitators well prepared?
- Were the participants well prepared?
- How were the logistics?
- What is the appropriate follow-up for each person in the group?
- What should be done differently next time to improve the meeting?

## Sample Group Meeting Agenda

- **Introductions**
- **Overview of the meeting:** Review the agenda, outline the meeting's goals, and give context for why the meeting is important.
- **Reports:** Share information and updates with the group.
- **Discussion of plans for the week:** Consensus building, troubleshooting, brainstorming, planning, voting.
- **Delegate tasks:** Have people sign up for upcoming tasks.
- **Skills training:** Run a training on a skill that is relevant to upcoming events.
- **Wrap-up:** Quickly review everything that was accomplished or decided at the meeting.
- **Announcements:** Announce upcoming social plans or other events.
- **Adjourn**



# Grassroots Organizing

In order for your campaign to succeed, it's usually necessary to demonstrate grassroots support from the public. Occasionally, the decision maker on your issue will support your campaign on its merits alone. But more often than not, your campaigns will face opposition from powerful, well-funded interests, and you will need grassroots support to counter their influence.

## Campaign Planning

- 1 Define the problem you're trying to solve.** How you define problem will determine how you approach the campaign.
- 2 Define the solution.** The solution is the inverse of the problem. For example, if you define the problem as "Plastics are polluting our beaches" your campaign may focus on beach clean-ups. If you define it as "we make and use way too many single-use plastics" your campaign will focus on stopping the use and production of single-use plastics.
- 3 Decide what forum you'll work in.** The forum is *where* you will try to make the difference in the campaign. There are three main types of forums:
  1. Legislative - Local, state, federal
  2. Executive - A decision made by executive order (ie. Mayor, Governor)
  3. Institutional - Public or private, corporate boardroom, president of an institution (ie. campus, a corporation, a sports arena)
- 4 Define your goal.** The goal is *who* you want to get to do *what* by *when*. Your goal should have a target (the who), an action (what you want the target to do), and a timeline (by when). For example: *Our goal is to convince the mayor to stop using single-use plastics at city events by the end of the school year.*
- 5 Figure out your strategy.** The strategy is your theory of how you'll get the target to do what you want. For example: *Our strategy is to show the Mayor that she'll have more support from the business community if she signs our solar bill.*
- 6 Decide your tactics.** Tactics are the specific activities used to implement the strategy. There are thousands of tactics you could use! Pick a handful and set clear numerical goals. For example:
  1. Collect 500 petition signatures
  2. 20 small business owner sign-ons
  3. 5 lobby meetings



# Principles of Planning

- **Be ready for plans to change.** Keep in mind that your plan will constantly evolve and you should update it regularly. Inevitably, things will not go according to plan or new opportunities will arise, so your plans should change.
- **Set measurable goals.** Use numerical goals for every aspect of the campaign. Goals give you concrete things to shoot for that keep you motivated.
- **Work backward.** For each of your goals, work backward from the goal to figure out what you need to do and when you need to do it. First, think through all the steps that will be required in order to meet the goal. Then, figure out when these steps need to happen in order to meet your goal on schedule.

*For example, if your goal is to hang 500 posters in Week 3 of the semester, then you will need to design the posters, get them approved, get them copied, and recruit 20 volunteers to help hang them. All of these steps should be completed by the end of Week 2, so that the poster hanging can happen in Week 3.*

*Working backward helps make sure you plan for all the details that each task will require, and also makes sure you accomplish those tasks early enough to be able to stick to your timeline.*

- **Set your priorities.** What are the most important things to focus on this week? Today? Pick the tasks that absolutely have to get done and make them your priorities. You will always be pulled in a dozen directions, but you can stay on track if you make sure you get your priorities done.
- **Use your plan!** Don't throw it in the desk drawer and ignore it. Consult it regularly. Also, make sure to share your plan with those around you. They will help hold you accountable, plus your plan can serve as a model for how others should be planning their own work.
- **Re-evaluate and adjust your plan daily and weekly.** Figure out if you've kept up with the goals and timeline you set. If not, try to determine why you're off track. If you're off track, figure out what you have to do and when in order to catch up to your goals. If necessary, reduce your goal if it's no longer realistic to attain. Or, if things are going better than projected, consider increasing your goal.
- **Seize opportunities that come up.** Sometimes you will want to add new projects or events to the plan that weren't in it originally. Opportunities will present themselves and you will want to take advantage of them. Don't feel boxed into your plan or limited by what's in it. If a good new idea comes along, try and see if there's a way to fit it into your plan.
- **Use your plan to amplify your efforts.** Figure out what you realistically can expect to get done yourself. Then, try to delegate everything else in your plan to others. By using your plan, you can delegate tasks ahead of time and help ensure that more is going on than just what you can do alone.

## Deciding your target, strategy, and tactics

Should you target the Mayor or the Lead City Council Member? Should you get 1,000 petitions from students or focus on getting faculty to write letters of support?

Thinking through the following questions will help you decide how to plan and focus your campaign.

- **Setting your target.** Who has the power to make the decision that will win your campaign? Is it a single individual (e.g., the university president) or a group of people (e.g., the student government)? The decision maker will be your campaign target.
- **Who influences the target?** Identify all of the individuals and institutions that influence the campaign target (e.g., faculty members, political figures, student groups, alumni, etc.).
- **Which have the most influence?** Rank the people and groups you've identified based on their level of influence on the target.
- **Which of these does your group have influence over?** Identify the groups that you know and have access to. These are the people and groups you should prioritize getting on your side.
- **Assess the opposition.** Is your campaign likely to have opposition? If so, estimate your opposition's influence over the target. Of the people and groups that influence your target, which of these does the opposition have influence over?
- **Who are the "swing" groups?** Of the groups you've identified, which ones are influenced by both your group and by the opposition? These will be the most important, and the most difficult, groups to win over.
- **What will you need to win this campaign?** What are your resources? What other resources can you get from allies?

## Making a Campaign Plan

- **Make a planning grid.** You can do this on paper or in a spreadsheet. Create a grid that has a column for each week in the campaign, and the far right column should be for the campaign goals. Down the left side, each row should be dedicated to one realm of your group's work. There should be rows for things like: Petitioning, Educational Events, Other Campaign Tactics, Leadership Development, Coalition Building, Recruitment, and Weekly Priorities.
- **Set your goals.** Once you've outlined your plan, the first step is to put in campaign goals for each realm, which go in the far right box of each row. These goals should represent what you want to accomplish over the course of the entire campaign timeline (for example, the goal for Petitioning might be to gather 1,000 signatures).
- **Work backward from your goals.** Go through the rows, one by one, and work backward, figuring out what tasks need to be done to meet your goals, and placing each task in the week that seems best for it.

Some things will be easy to place in a specific week because they are scheduled for a pre-determined date or time period. For example, anything related to your recruitment drive needs to go in the first few weeks.

Once those fixed events are in place, the weeks prior to them should be filled in to include the preparations that are necessary for those events. Figure out what preparation needs to be done (reserving space, inviting speakers, recruiting volunteers, making signs, etc.) and how far in advance it should happen.

Once you've done all these things, there will usually be a few additional goals in each row that still need to be worked into the plan. Place them in the plan at the times that seem to make the most sense for them.

- **Check for feasibility.** Go through the plan for each week, by looking at one column at a time. Watch out for weeks that seem like they might be too busy. If your three biggest events of the semester are all planned for the same week, you may want to adjust your plan to spread them out. Go through and tweak the plan to spread out the work as best you can.
- **Set your priorities.** Now, go through and fill in the Weekly Priorities row. For each week, choose up to three realms or events that will be the top priorities for that week.

**No social advance rolls in on the wheels of inevitability. It comes through the tireless efforts and persistent work of dedicated individuals. ”**

Martin Luther King, Jr.





# Sample Campaign Planning Grid: Campaign to Save the Bees

	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Goals
<b>Grassroots Organizing</b>	Collect 200 petitions (20 hrs of tabling)	Collect 200 petitions (20 hrs of tabling)		Collect 100 photo petitions (10 hrs of tabling)	Collect 25 handwritten letters at panel discussion		Collect 300 petitions (30 hrs of tabling)	Collect 300 petitions (30 hrs of tabling)	1000 petitions to the city council. 100 photo petitions. 25 handwritten letters to the city council.
<b>Educational Events</b>	Book room, A/V, etc. for panel. Send donation requests for BBQ.	Send panelist invitations	Confirm panelists	Book BBQ location. Follow up on donation requests.	Faculty Panel Discussion	Reserve grill, etc., for BBQ	Pick up food, supplies for BBQ	BBQ Without Bees event	100 attendees at "BBQ Without Bees" event. 50 attendees at panel discussion.
<b>Community Service</b>	Book shifts at campus garden		Volunteer at campus garden			Volunteer at campus garden			2 trips to campus garden, 20 volunteers at each.
<b>Media &amp; Visibility</b>	Prep posters, giant bee prop for round #1	Visibility round #1	Social media drive #1	Prep posters, leaflets for round #2	Visibility round #2	Social media drive #2	Prep posters, leaflets, banner for round #3	Visibility Round #3	3 rounds of visibility (each round: 200 posters, 1 prop). 2 rounds of social media promotion (each round: add 50 followers to each account).
<b>Coalition Building</b>	Prep fact sheets, endorsement forms for faculty, businesses	Make target lists of faculty, businesses	Faculty outreach (visit 20 faculty)	Faculty outreach (visit 20 faculty)	Business outreach (visit 20 businesses). Invite faculty to panel	Business outreach (visit 20 businesses)	Follow-up visits to undecided faculty, businesses	Send thank you emails to all endorsers	10 faculty campaign endorsements. 10 business endorsements.
<b>Recruitment</b>	Collect 100 volunteer sign-ups. Phonebank for petitioners (10 hrs of calling)	Collect 100 volunteer sign-ups. Phonebank for petitioners (10 hrs of calling)	Phonebank for garden event (8 hrs of calling)	Phonebank for photo petitioners (5 hrs of calling)	Phonebank for panel discussion (20 hrs of calling)	Phonebank for garden event (8 hrs of calling)	Phonebank for petitioners (12 hrs of calling)	Phonebank for BBQ Without Bees (20 hrs of calling)	Collect 200 volunteer sign-ups. Have 50 students volunteer.
<b>Leadership Development</b>		Phonebanking Training	Event Planning Training	Visibility Training	Coalition Building Training	Petitioning Training			Recruit 10 coordinators. 5 skills trainings.
<b>Weekly Priorities</b>	Volunteer recruitment	Volunteer recruitment	Campus garden event	Faculty outreach	Panel Discussion	Business outreach	Petition drive	BBQ Without Bees	



# Petitioning



Petitions are one of the best ways to show broad support for your campaign and influence decision makers.

From an organizer's perspective, petitioning is the most effective way to reach a large number of people through one-on-one contact. As a result, a big petition drive is a powerful mechanism for recruitment, education, and outreach.

## Reasons to Petition

- Demonstrate wide support for the group or a specific campaign.
- Educate the student body.
- Create visibility for the organization.
- Train students in basic skills.
- Identify and recruit new students to join the effort.
- Build your email list.

## Tips for Petitioning

- 1 Ask everyone and use a catchy opening.** You will get more people to stop and talk to you if you greet them with a short, upbeat opening. Smile, wave, and make yourself approachable.
- 2 Make sure people fill out the petition completely and legibly.** Check that each signer fills in their address, phone number, email address, and other pertinent information so that you can follow up with supporters.
- 3 Tell everyone about volunteer opportunities.** Ask enthusiastic signers to get involved in the campaign.

## Planning a Petition Drive

- **Have a plan.** Establish a timeline and signature goals for the petition drive as a whole, as well as for each petitioner. The success of a big petition drive depends on executing a well-planned and coordinated effort.
- **Make time for training.** Petitioners should attend a training session that includes a discussion of the petition drive's goals, as well as lots of roleplays.
- **Have a strategy for where and when to petition.** High-foot-traffic areas should be the priority, like dining halls during meals and along major walkways or outside academic buildings during classes. However, you may need to diversify your locations to reach the widest range of people. For example, music majors might never eat in the cafeteria, but they may frequent the concert hall. On a residential campus, organizing a door-to-door petition drive in the dorms can be an effective way to reach a majority of students.

# Event Organizing



Most campaigns include at least one big event. There are lots of reasons for doing big events.

- **Volunteer opportunities.** Big events have lots of moving parts, so they provide a wide range of volunteer opportunities for students.
- **Visibility.** Your group will gain visibility through your publicity of the event and through media coverage, as well as from the direct involvement of the people who attend the event.
- **Advancing your campaign.** Big events can be a tool to reach a lot of people and achieve your campaign goals, such as generating political actions or raising awareness about an issue.
- **Coalition building.** Big events provide a great opportunity to work closely with other organizations and VIPs.
- **Leadership development.** Planning a big event is one the best ways for your leaders to learn how to be effective organizers.

## Organizing a Big Event

**1 Build a coalition.** The larger and broader the coalition sponsoring the event, the more attention and credibility it will receive, and the easier it will be to get a good turnout for the event. As much as possible, you want to involve other groups in organizing the event.

- Create a target list of coalition groups.
- Speak to as many groups as possible and sign them up for some level of involvement (endorsing the event, helping to publicize it, providing volunteers, etc.).

**2 Plan out the logistics.** It's important to nail the logistics of the event.

- Start planning early.
- Set the date as early as possible.
- As soon as you have the date, set your location. Find a room or location in a central place.

- If necessary, line up food, supplies, and materials.
- Reserve any necessary equipment (e.g., microphone and speakers)
- Make the necessary visuals.
- Confirm everything!

**3 Get presenters, speakers, or MCs.** Many types of events require you to get speakers or presenters. These include panel discussions, lectures, movie screenings, debates, etc. You might also want a good speaker who can kick off a service event or other activity. Here are the steps for finding presenters:

- Research and prepare a list of speakers to invite. Depending on the event, potential speakers might include leaders from coalition groups, local elected officials, faculty members, etc.
- Call or visit potential speakers to invite them.

- Some speakers will ask you to send them a written request for their attendance. In that case, send them the letter, then call after a few days to follow up.
- Make sure that all presenters are familiar well in advance with the topics, the format for the event, and how much time they will have to speak.

4

**Generate media and publicity.** Publicity will be critical to turning out people for your event. Start by choosing the message for your event—what will catch people’s attention and make them want to attend? Once you have a message, design the materials that you’ll need. There are lots of types of visibility you should include in your plan:

- Get the media to cover your event—ask them to do an announcement about the event beforehand, then to come cover the event when it happens.
- Hang posters around campus.
- Chalk the campus sidewalks.
- Hand out fliers.
- Make announcements in classes related to the topic of the event. Ask the professors if they will give their students extra credit for attending.

5

**Turn out attendees for the event.** In addition to visibility, there are more active tactics you should use to ensure turnout:

- Visit meetings of coalition partners to make sure they will attend. Ask them to get the word out to all of their members.
- The night before the event, phonebank people who filled out volunteer cards to invite them to attend.

6

**Recruit volunteers.** Many big events will require lots of volunteers. With a river cleanup or service event, volunteer turnout and event turnout are the same thing. With other events, like a panel discussion or an Earth Day celebration, you may need lots of volunteers to help with set-up, clean-up, or working at a table.

7

**Hold the event.** This is when all of your hard work needs to pay off, so make sure you have reliable students trained and prepared to oversee all of the moving parts.

- Get there well in advance to set up – arrange chairs, get sound equipment set up, hang banners or signs, etc.
- Greet presenters as they arrive. Assign a volunteer to assist each of them and keep them company.
- Keep the event running on time.
- Have a volunteer coordinator set up who can quickly plug volunteers into their roles as soon as they arrive.

8

**Follow up.** Even though the event is over, your work is not. You need to strike quickly to capitalize on the opportunities created by the event, as well as to acknowledge everyone involved.

- Follow up with the media to confirm coverage.
- Send thank-you letters to presenters.
- Debrief with leaders.
- Check in with coalition partners.

“Success depends upon previous preparation, and without such preparation there is sure to be failure.”

Confucius



## Sample Event Planning Calendar

### River Clean-up

A big event requires a lot of advance planning. Some events might take six months or more to plan. You need to set goals, work backward from those goals to determine what needs to be accomplished, and then make a week-by-week plan to make sure the event is planned out. Below is a sample plan for a big river clean-up.

	Week 1	Week 2	Week 3	Week 4	Week 5: The Event	GOALS
<b>LOGISTICS</b>	Scout location, reserve site	Make donation calls for gloves, trash bags	Pick up donations, call public works to pick up trash	Identify drivers for carpools	Print out directions, confirm public works	Book location, gloves & bags donated, set up carpools
<b>VISIBILITY / MEDIA</b>	Hang 100 posters	Hang 100 posters, submit 4 LTEs	Chalking, call to confirm LTEs	Advisory sent to all media targets	Media calls, confirm media	200 posters, chalking, 4 media hits, 2 LTEs printed
<b>VOLUNTEERS</b>	cards: 40 hours; 200 sign-ups	Call volunteer	Table: 40 hours; 200 sign-upssign 20 raps; 200 sign-ups	Class raps to up vols:	Confirmation calls to all vols: 30 hours	75 vols at the event: 150 say yes; 600 signed-up vols
<b>COALITIONS</b>	Make target list of 20 groups, meetings call leaders of 10 groups	Attend	Sign on 5 co-sponsors, get them to set goals for tur nout	Confirm groups		5 co-sponsor groups
<b>PRIORITY FOR WEEK</b>	Logistics	Coalitions	Volunteers	Volunteers	Confirm vols, media	

# Coalition Building

Frequently, your campaigns will be waged against well-funded opponents with far greater resources than you can muster. Working with other groups should be one of the most important elements of any campaign, as a way to level the playing field. By utilizing coalitions, you rely on the old saying, “there is strength in numbers.”

---

## Reasons to Build a Coalition

- **Portray strength.** A coalition gains strength from having a list of participating organizations representing diverse interests and greater memberships— the sum of which is greater than the individual parts.
- **Consolidate resources.** Other groups may be able to provide the campaign with technical expertise, financial resources, name recognition, or people power.
- **Build power and influence.** By working with influential organizations, your group becomes more influential itself. Powerful coalition partners can help you get better access to the media or decision makers.
- **Become more influential.** Regular participation in coalitions establishes your group as a leader, which leads to increased credibility, name recognition, and respect within the community.

“We must all hang together, or assuredly we shall all hang separately.”

Benjamin Franklin, at the signing of the Declaration of Independence

## Coalition Models

Before building a coalition, it's important to consider the way the coalition will be structured. In choosing which model to use, consider how long the campaign is likely to last, the resources required, the level of interest in the issue, and how well the potential coalition members work together.

**Endorsement model:** This is the “paper tiger” model - a list of endorsers is built to lend credibility and breadth to the effort. The members of the coalition might do little beyond adding their names to the list of supporters.

**Associate model:** With this model, participating groups and their leaders are encouraged to play an active role in the campaign, but decision-making still rests with your group.

**Partner model:** The partner model assumes that groups in the coalition are active participants and share control of the campaign. Groups in the coalition work together closely on a daily basis. Each group's level of input into the coalition is generally based on how many resources they bring to the table. There are usually two ways to set up this coalition:

- **Collective:** Representatives from the coalition groups meet frequently to make decisions.
- **Separate organization:** An entirely new organization is created to run the campaign.

## Building a Coalition

- 1 Determine which model to use and set goals.** Which model will best suit your plans? Once this is decided, consider how the coalition can be most helpful. Ask yourself:
  - What image do you want?
  - What resources are needed (financial, volunteers, issue expertise, access to the media, access to decision-makers, etc.)?
  - Who can you build relationships with through this campaign?
  - What groups would you like to be working with?
- 2 Make a list of organizations to approach.** Some organizations will come quickly to mind, but others will require serious thought. Come up with as broad-based a list as possible. Be creative! Consider who needs to be influenced and work backward. Analyze all the advantages and disadvantages of potential coalition partners. In general, the better you know who's out there, the easier this list will come together. If you are new to an area or the issue, it might be helpful to get some tips from other groups or other issue experts.
- 3 Create a coalition packet.** Assemble a set of materials that describe the issue, the campaign, and the coalition. You should lead with a cover letter that outlines the campaign and asks groups to join the coalition. Include supporting materials like fact sheets, news clips, reports, etc. If the coalition is going to be small and focused on key leaders, the materials should be personalized for each target.
- 4 Contact your target groups.** Call the groups on your list and set up a meeting to sit down with each one. Set a strategy for how to prioritize groups – you might approach easy groups first to get the ball rolling, or focus your time on the major players. At these meetings, explain your plan for the coalition and make a pitch for them to join.

Most groups won't be able to commit on the spot, so give them the coalition packet and make a plan to follow-up. Ask about their decision-making process. Do you need to attend any meetings? Do you need to contact another division of the organization?

- 5 Get their decision.** This process can be time consuming since many groups have more than one step before endorsing or joining a coalition. Persistence and attention to their schedule will pay off. Pay the most attention to the priority groups—once a core of supporters has been established, it may become easier to get other groups on board.

Depending on the structure of the group, you might need to lobby individual members of the organization. If other coalition members have influence with the group or its leadership, use them in your lobbying effort. Be

prepared to answer questions and to provide convincing reasons why the group should endorse the issue or get involved with the campaign. In addition to thinking through what you want from each group, think about how they will benefit from their involvement in your coalition.

- 6 Get the commitment in writing.** Try to get a specific letter of endorsement from each group, in addition to getting permission to use their name on the coalition's endorser list. Ideally, the letter should include a brief description of the organization, a reference to the issue (a bill number or initiative name), and a call for legislative or citizen support for the campaign.

Get clear permission to use the organization's name on letterhead, in press releases, and otherwise "speak with its voice." As much as possible, anticipate other opportunities for the group to participate in the coalition and get them approved up front.



7

**Maintain structure and communication.** Make a plan for how you will keep coalition members informed about the campaign. How formal will the coalition be? How will decisions be made? How will the members stay informed on developments in the campaign? Will the coalition meet weekly, monthly, or never? Even in the case of a “paper tiger” coalition, you need to communicate on a regular basis. At a minimum, you should send monthly updates, pass along great news stories, invite groups to attend relevant hearings and meetings, etc.

8

**Use the coalition.** Hold a news conference to announce its formation. Circulate petitions within the ranks of the organizations. Send decision-makers updated endorser lists and individual letters of support. It’s important to encourage involvement as well as accountability within the coalition.

Think of an endorsement as the beginning of a longer-term relationship. Ultimately, you want to know and trust your coalition partners (and vice versa), get their support on other issues, and win their support of your organization itself.

## SAMPLE OUTLINE FOR COALITION PITCH

- **Make sure you’ve contacted the right person to discuss joining the coalition.** If not, find out the appropriate person to contact.
- **Give a brief presentation on what you’re asking of them.** Don’t push for an immediate decision; instead, give them the coalition packet and ask them to take your request back to their group. Tailor your pitch, depending on the group you’re addressing.
- **Find out about their process.** Ask how they make decisions like these and whether there are other people or committees you should speak to about the coalition.
- **Make a follow-up plan.** Let them know when you will be contacting them again to check on their decision.

## Types of Coalition Member Activities

### Media

- Generating letters to the editor (LTEs)
- Co-signing LTEs or op-eds
- Attending an editorial board meeting or helping to set it up
- Attending press events
- Doing radio feeds
- Sending out news advisories or releases
- Producing materials
- Making calls to reporters

### Grassroots

- Collecting signatures
- Writing letters from the organization to the target
- Generating letters from members to the target
- Making and generating phone calls and emails to the target
- Putting an article about the campaign in their newsletter
- Turning out members to district meetings and other events

### Coalition

- Identifying other groups and getting them involved
- Sending packets and making follow-up calls
- Making presentations to potential coalition partners

### Direct Advocacy

- Setting up or attending district meetings
- Attending a lobby day
- Allocating lobbyist time to the issue
- Helping to identify the power players
- Setting up and attending meetings with VIPs

### Fundraising

- Participating in joint fundraising activities from grassroots to grants
- Writing a letter to funders in support of the program
- Donating phones, paper, staff time, etc.

### Research

- Co-authoring a report
- Helping with surveys or data collection

# Email Organizing

Your organization should maintain an email list, made up of students who have expressed interest in volunteering with your group or have signed a petition or other action. You should email this list on a regular basis – once a week is a good rule of thumb – with information about your campaigns and how to get involved.

Some common reasons to email your list include:

- Recruiting volunteers
- Recruiting interns
- Inviting students to a meeting or event
- Announcing a new campaign or victory
- Asking students to sign an online petition

You should track the response rates that each email receives, in order to determine which content generates the biggest returns. If your email newsletter software tracks this data, pay attention to the “open rate” (percentage of recipients who open an email), “click rate” (percentage of recipients who click on a link in the email), and “action rate” (percentage of recipients who take the action asked in the email). Double-down on the issues and actions that get the best rates. Set goals to increase these rates from week-to-week and semester-to-semester.

---

## Sample Email Alert Structure

Although there will be times when you choose to break these rules, the following structure is a good starting point for any email alert.

If you are having trouble writing brief email alerts, try simplifying your core message down to one sentence for each of the following bullet points. Use that as your starting point and add more language back in only if necessary.

### **Problem**

A major loophole in the Clean Water Act leaves more than half of our nation’s streams and 20 million acres of wetlands virtually unprotected from polluters.

### **Solution**

We need to stop toxic waste from being dumped into the rivers and streams we love and depend on for swimming, fishing, and drinking.

### **Urgency/Challenge**

The Environmental Protection Agency is considering this issue, but they’re under huge pressure from Big Ag and Big Oil not to act.

### **Campaign/Call to Action**

That’s why we’ve launched a campaign to convince the EPA to close this loophole. Ask the EPA to protect all of our waterways: [www.ACTION.org](http://www.ACTION.org)

### **More Information**

Our waterways face pollution every day from factory farms and coal and oil companies that use our streams and wetlands as their personal sewers. And these are critical waterways – they provide the drinking water for 117 million Americans.

### **Second Call to Action (Optional)**

You have a huge opportunity to help us protect our waterways. Please take action today and tell the EPA why you care about America’s rivers and streams: [www.ACTION.org](http://www.ACTION.org)

### **Tell-a-Friend**

It only takes a minute to help. And if you forward this message to your friends and family, we’ll really get the word out there.

# Writing Effective Email Alerts

How many times have you deleted an email without even getting past the first sentence? You're not the only one.

Here are some tips for writing effective email alerts that get read.

- 1 Know your audience.** Most of your email list is likely made up of students who are mildly interested in your campaign but have never taken the time to volunteer. Write with these people in mind, not your hard-core supporters.
- 2 Connect to your recipients' lives.** Let them know how your issue affects them personally.
- 3 Make it urgent.** Be clear about why you are sending the alert today instead of three weeks from now or next year.
- 4 Have one clear ask.** Ask for one action from the reader, and make it hard to ignore - put the ask in its own paragraph, in bold text, and repeat the ask a couple times.
- 5 Get to the point.** Let your recipients know what you want from them within the first few sentences of your email message, and have a link to the action.
- 6 Use everyday language.** Write your alerts as if you were writing to a friend who doesn't know anything about your campaign. The average member of the public cares about protecting the environment, not Senate Bill 3582.
- 7 Be someone.** You, the author, are a human being. Sign your name to your email action alerts. Write in the first person - "I need your help to protect our oceans," instead of "Your help is needed to protect our oceans."
- 8 Don't forget the subject line.** The subject line is the single most important sentence of your entire email message. Well-designed subject lines can double the number of people who open your email alerts.
- 9 Follow up.** Thank your activists for their help. Make sure to report back and let the people on your mailing list know what happened after they took action.

## Email Checklist

Use this checklist to make sure you haven't missed anything when crafting your email action alert.

### Does your email alert answer these questions?

- ☐ Why is the issue urgent?
- ☐ How does this issue connect to the recipient's life?
- ☐ What is the campaign's problem?
- ☐ What is the campaign's solution?
- ☐ What can the reader do to help solve the problem (in one simple action)?

### Make sure your alert includes these basics:

- ☐ Compelling subject line
- ☐ Link to more info
- ☐ Request that people forward the alert
- ☐ Signed by a real person
- ☐ From a real organization
- ☐ Organization's website
- ☐ Clearly marked beginning and end

### Does your email alert read well?

- ☐ Is it personalized?
- ☐ Would you send this to your mom?
- ☐ Do you ask any questions?
- ☐ Is it written in the first person?
- ☐ Is it repetitive?

### Is your email alert formatted well?

- ☐ Count the number of lines in each paragraph. If any paragraph has more than 5 lines, edit it down.
- ☐ Count the number of lines in each sentence. If any sentence goes more than 2 lines, edit it down.

# Working with the Media



The media is one of the most powerful and influential institutions in our society. By deciding which news stories get covered, the media shapes public opinion and defines which issues are considered to be important. Getting media coverage should be a priority for all of your campaigns.

Good media coverage enables you to educate and influence thousands of people within a given media market, helping you to win reforms. Building media relations is the key to getting coverage as well as a critical piece of any power building strategy – the people who determine what’s news are people who influence your ability to make things happen.

---

## Reasons to Generate Media Coverage

- It advances your group’s goals. Effective use of the media in a campaign is one of the most important tools you can use to achieve campaign victories.
- It educates and influences opinion leaders they read and watch the news). It educates and influences the public (they may read and see it, too).
- It builds name recognition and credibility for your organization.

## Media Opportunities

Anything you’re doing can be made into a media opportunity if you can create an appropriate “handle” – something for the media to latch onto. Common examples include:

- Launching a campaign
- Pressuring an individual or group to take action
- A campaign victory
- A visibility event to educate the public
- Releasing a report
- Organizing a big event
- Public criticism or protest when something went wrong
- Commenting on a current event that highlights the need for your campaign
- Bringing influential groups or VIPs to add support to our efforts



## Principles of Media Organizing

- **Make sure you have a good media list.** Pull together a comprehensive list of on-campus and off-campus media outlets, including newspapers, TV and radio stations, and local news websites and blogs. Figure out the best contact people for each outlet, along with their contact information.
- **Get to know the media.** Beyond just their contact info, find out what the audience is for each outlet, which communities they cover, and which legislative districts they reach.
- **Become a media junkie.** Read the campus and local papers whenever they come out, listen to the radio news shows, and watch the TV news when you can. Also follow top local reporters on social media. You'll quickly get a sense of what types of news each outlet tends to cover. You will also be able to see which reporters cover each type of issue.
- **Ask coalition partners for tips on getting media coverage.** They will often know which outlets or reporters are most interested in public interest issues and how best to approach them. If a coalition partner seems to know a reporter particularly well, see if they can introduce you.
- **Call up reporters and introduce yourself.** Find any little excuse to call (e.g. call and compliment them on a story they just did). Update your contact info for them, find out how and when they prefer to be contacted, and ask what issues they're particularly interested in.
- **Meet in person with campus media VIPs.** Campus media outlets are the ones you will pitch most frequently, so it's important to build good relationships with them. Fortunately, campus outlets are much more accessible than off-campus media. Set up in-person meetings with the editor-in-chief and news editor at the campus paper, as well as the news editors at any campus radio or TV stations.
- **Promote your work online.** Reporters use social media to look for potential stories. Anytime you hold a media event or do something newsworthy, post it on your organization's website and social media accounts. Post during and after media events, with links to videos, pictures, quotes, press statements, and highlights.

“Whoever controls the media—the images—controls the culture.”

Allen Ginsberg



## Building Media Relationships

Effective media work requires much more than sending out news releases. You will only get consistently good coverage if you build relationships with your media contacts. It is one thing to know the names of top newspaper reporters in your area who cover your issues, and something very different to talk with them regularly, get your calls returned frequently and happily, and get called by them when they need a quote for their next story.

- **Make their jobs easier.** Give them information at times and in formats that are easy for them to use.
- **Personal contact is important.** Media outlets receive thousands of releases weekly. Make sure they remember you.
- **Meet face-to-face with the beat reporter who covers your issue area.** If possible, get introduced to them by a shared contact like a coalition partner.
- **Thank them when you get good coverage.**
- **If they did not cover your event, follow up with them and find out why.**
- **Congratulate them on good stories even when you are not covered.**
- **Know who the gatekeepers are.** These are the people who decide if a reporter gets assigned to your stories.
- **Ask for advice and feedback from reporters.** How could your media outreach have been done better, presented better, or written better?
- **Give them ideas for hot stories, whether or not they're yours.**
- **Never lie.**

---

## Tips for Pitching Reporters

- 1 **Do your research.** It's not enough to just know a reporter's beat. Look up past stories they have written so you know what they like to cover. If you can make it seem like the story you are pitching is tailored to what that reporter likes to cover, you will be more successful.
- 2 **Ask reporters what they like to write about.** If you haven't already done this, don't hesitate to just come out and ask generally: how do you decide what you're going to write about?
- 3 **You're doing them a favor, not asking for help.** It's easier to show them this when you know what they like to cover. Reporters need you, because you are the one who can give them the story they are looking to write. Make the reporter feel like you are familiar with their work and you are pitching them something that is right up their alley.
- 4 **Make a strong pitch.** As soon as you have the reporter's ear, they are already thinking about how they are going to pitch the story to their editor. If you present a thorough, well-organized pitch, the reporter can often use the same pitch to pass the idea by the higher-ups. Hand the story to them—make it as easy as possible. Let them know what supporting materials you can send.

## Tips for Media Pitch Calls

Any time you hold a news conference or newsworthy event, you will need to call reporters and pitch them on your story.

- 1 Make the calls.** Reporters get a ton of emails every day. You can only use email to pitch if you have a very good relationship with a reporter.
- 2 Be friendly!**
- 3 Make sure you're talking to the right person for the topic of your pitch.**
- 4 Always ask if the reporter has a moment to talk.** If they're on deadline or busy, just quickly ask for a good time to call back.
- 5 Have your pitch ready to go.** This is the 30-second rap you will tell reporters to interest them in the story. Your pitch should deliver your message and stress the elements of your story that you think the reporter will be in to.
- 6 Know what makes your event appealing to reporters.** Emphasize how good the visuals will be and the newsworthiness of your speakers.
- 7 Don't get discouraged.** Reporters will almost never commit to covering something, so don't let that bother you.
- 8 Leave with a follow-up plan.** It could be sending the advisory, a news release, or background materials.
- 9 Be prompt.** If you say you are going to get information to a reporter, let the reporter know how long it will take and make sure you follow through on time.

## Sample Media Pitch

Hi, is \_\_\_\_\_ there?

Hi \_\_\_\_\_, this is \_\_\_\_\_ from CALPIRG. How are you doing? Great!

I wanted to give you a heads up that next Thursday we're going to be holding an event here on [CAMPUS].

The event will take place at [LOCATION] with [LIST PARTICIPATING PEOPLE/ ORGANIZATIONS]. I thought this would be of interest to you because [MAKE YOUR PITCH].

Does this sound like something you'd be interested in covering?

*[They will likely be noncommittal. This is fine - it doesn't mean they're not interested.]*

Great. I will email the advisory over to you. Can you give me your email to make sure I have it listed correctly? I'll give you a ring to follow up and feel free to contact me as well. Take care!



# News Conferences

News conferences are one of the best ways to generate media. At a news conference, you invite reporters to come to a location and watch you make a presentation. A news conference can be part of a larger event – like a rally, town hall meeting, or community service project – or an event in its own right.

## Planning a News Conference

**1**

**Determine whether a news conference makes sense.** Make sure that your event is likely to succeed in generating media coverage. Factors to consider are:

- Are you presenting new information that the media hasn't seen before?
- Is there conflict around the issue?
- Will anyone important or famous be involved?
- Will you have compelling visuals for TV cameras to cover?
- If the issue is a national one, can you present a local angle?
- If you cannot answer "yes" to three of these questions, you probably should not be having a news conference.

**2**

**Figure out the logistics.**

- Timing is critical to a successful event. Know the news deadlines in your city. In general, media events should take place between 9:30 and 11:00 a.m. In most cities, Tuesdays, Wednesdays, Thursdays, and in some places Saturdays, tend to be best.
- Picking a location is a critical decision. The number one consideration is accessibility to the media. Ideally, the location should provide good opportunities for photographs or be relevant to the press conference. Before choosing a location, visit it in person at the time of day of the planned press conference to check for crowds, noise, parking availability, etc.

If you're considering a location that is out of the ordinary, call and ask a reporter if they would come to that spot.

**3**

**Find speakers.**

- It usually takes a few weeks to line up big name speakers. Leave yourself at least two weeks preparation time.
- Anyone who agrees to speak at the conference needs to know in advance who the other speakers are, what each speaker is going to say, and what questions to expect.
- Each presentation should be 2-5 minutes, each speaker should have at least one "quotable quote," and each speaker should be prepared to make their presentation without reading notes.

**4**

**Prepare materials.**

- Prepare and send out a news advisory three days before the event. The advisory should briefly state the who, where, why, and when of the event.
- Prepare a news release for distribution to members of the media. You will hand out the release to reporters who attend the press conference and email it to outlets that don't attend.
- Any news conference should have at least one good visual for the cameras. Examples of successful visuals include blown-up charts or graphs or a blown-up copy of a petition. Also be sure that there is a sign or banner with your organization's name clearly displayed.

“If you don't like the news, go out and make some of your own.”

Allen Ginsberg

5

**Make sure the media turn out.** Even the best planned event is a flop if no media show. The only way to ensure good attendance is to follow up with reporters individually.

- Everyone who receives your news advisory should receive a personal phone call three days ahead and then one day before the event.
- Anyone who seems mildly interested in the initial phone call should receive a reminder call the day before and the morning of the event.
- Call TV producers and the AP news service the afternoon before and the morning of the event.
- Keep good records on who you call and what they say so that you can follow up properly.

6

**Be prepared at the event.**

- Make sure you arrive early.
- A greeter should be stationed at the door with a sign-in sheet and a packet for reporters.
- No matter how many or how few people have arrived, do not start the event more than five minutes after the scheduled time.
- Introduce yourself and the speakers and be sure to keep things moving along.
- Leave up to 15 minutes for questions and answers.
- You may need to stick around afterward to do interviews with various reporters.

7

**Follow up with reporters.**

- Email your press release to everyone who did not attend the press conference.
- Call reporters who attended the news conference to answer any questions and find out if they will use the story.
- Call reporters who did not attend to try to interest them in the story and give interviews.
- Send thank you notes to all speakers, along with copies of news stories from the event.
- Save video files of TV appearances and clips of print stories.



# News Advisories

A news advisory is designed to inform a reporter or editor about an upcoming news conference. It is like an invitation to a party.

The advisory should include the date, time, place, and purpose of the news conference. If there are important speakers or exemplary visuals, the advisory should mention those. The advisory, however, should not tell the whole story. If it does, nobody will bother to come to the conference itself.

Writing the advisory should take about half an hour. Like a news release, it should be proofread before being distributed. The advisory should be emailed out three days ahead of your event and then re-emailed the day before. Follow-up calls should be made in between distribution of the advisory and the event itself.

## SAMPLE NEWS ADVISORY

### MASSPIRG

294 Washington St., Boston, MA 02108  
(617) 292-4800 • [www.masspirgstudents.org](http://www.masspirgstudents.org)

**FOR IMMEDIATE RELEASE**  
Tuesday, November 24, 2013

**CONTACT:**  
Samantha Gibb, MASSPIRG  
[samg@masspirgstudents.org](mailto:samg@masspirgstudents.org)  
617-555-1212

#### STUDENTS HOST “NO BEES, NO THANKSGIVING” LUNCHEON

**WHAT:** A coalition of students, faculty, and local business owners will be hosting a Thanksgiving luncheon with one small difference – they won’t be serving any foods that would be lost if the bee populations continue to die off. Scientists, farmers, and beekeepers are sounding the alarm: bee colonies are in collapse, dying off in unprecedented numbers. The luncheon will raise awareness about this issue and encourage the Massachusetts Department of Environmental Protection to take action.

**WHO:** Samantha Gibb, MASSPIRG  
Dr. Holly Golightly, Professor of Biology, UMass Amherst  
Sam Spade, Local restaurant owner

**WHEN:** Tuesday, November 24, 2013  
11:00 a.m.

**WHERE:** Main Concourse, UMass Amherst Campus Center  
1 Campus Center Way, Amherst, MA 01003

**VISUALS:** Popular holiday foods  
Students in bee costumes

###

*MASSPIRG is a statewide student organization that works to defend the public interest.  
Visit us at [www.masspirgstudents.org](http://www.masspirgstudents.org).*



# News Releases

A news release is your way to get a clear, concise, standard message across to interested reporters. It is designed to answer their questions before they ask them and to frame the issue as you want it to appear. In addition, it provides the basis for determining whether a particular media person is interested in your campaign.

You will need to prepare a news release in conjunction with all news conferences. The release will give reporters a consistent story about what you're doing. You will also want to write and distribute a news release when something happens that is important, but not visual enough for a news conference.

- Writing a release from scratch may take 1 or 2 hours the first time you do it. Once it is written, it will take less than 10 minutes per reporter to follow up.
- Your news release should follow the standard AP format:
  - At the top of the page, provide information letting reporters know the date when the news will be relevant and who to contact for additional information.
  - Your title should be catchy enough and accurate enough to get attention. In the opening paragraph, lay out the who, what, where, when, and why of your news.
  - The second paragraph should consist of a quote from a representative from your organization, meant to personalize your organization's position.
  - In the third paragraph, provide more factual details on your position – statistics, recaps of recent events, etc.
  - In the fourth paragraph, provide another quote from your organization or a quote from a coalition partner or VIP.
  - Additional paragraphs should provide additional information.
- Follow the “inverted pyramid” format, where the first paragraph provides the most essential information and the last paragraph is the least important to getting your point across. The assumption here is that reporters and editors will tend to cut your story from the bottom up.
- The release should be no longer than two pages and printed on your organization's letterhead.
- The best way to write your release is to work backward from your goals.
  - Start by coming up with your ideal news headline.
  - Then develop your ideal sound bite – one that is catchy enough to interest a reporter and clear enough to convey your message.
  - Then begin to flesh out the other paragraphs of your release, following the outline above.
  - Remember that it is good to quote other people, too, not just members of your organization. Plan ahead, since it takes time to have people from other groups write or approve their quotes.
  - Include as many specific and local facts as possible.
- Your release is usually only the first step to getting coverage. You will occasionally be able to just email out a release and read your story in the following day's paper. Usually, however, follow-up is required. Call each reporter or editor who received the release. Make sure they understand why your story is so critical. Enhance your pitch with new information that wasn't in the printed release.
- Working with the media is a process. Write down the responses you get from each reporter and editor. Keep track of what they like and don't like about your release. Look back at your notes from past conversations before calling them to help you frame your story appropriately. In addition, pay attention to how they end up covering your story. You should be able to tell what works and what doesn't by seeing which parts of the release they actually use.

# Letters to the Editor

Letters to the editor (LTEs) are a great way to get easy media coverage for your campaign. Letters are easy to write and have a good chance of being printed. In addition, the letters page is one of the most widely read pages in the newspaper, so you can use LTEs to get your message out to lots of people.

## Writing an LTE

- **Read and respond.** Letters written in response to recent stories that ran in the paper are more likely to be printed. Read the paper and watch for stories that relate to your campaign.
- **Find a hook.** Try to hook the reader – and the editor – right away. Use an interesting anecdote or question, a provocative statement, or a colorful story.
- **Find an author.** Make sure you have a strategy for who signs the letter – whether it should be someone from your group, another group, a local official, or an average citizen.
- **Make one clear point in your letter.** After you pick your main point, stick to it.
- **Use your personal experience.** Express your concern about the issue in your own way. Example: “I was in the supermarket when I noticed how elaborate and wasteful so much of our packaging is...” or “Even my 10 year-old daughter understands the importance of recycling.”
- **Show, don’t tell.** Wherever possible, give facts or examples rather than using rhetoric. It’s more convincing.
- **Double-check your facts.** Make sure your arguments are accurate – both the actual words and context in which they are used.
- **Show emotion.** With LTEs it is fine to express feelings of anger or frustration – but make sure you avoid overstatement, hyperbole, and hysteria.
- **Keep it short.** Short letters are more likely to be printed. It’s best to stay under 150 words.

## Submitting an LTE

Submitting LTEs is easy. Most newspapers state their policies for submitting LTEs in the paper (usually on the opinion page). Make sure you follow their procedures exactly. It’s also frequently effective to send in letters from several people on the same issue – this increases the chance that the paper will print one of them.

The author should follow up with the editor of the letters page to be sure they received the letter, that it meets the paper’s requirements, and to ask when they are planning to print it.

### SAMPLE OUTLINE FOR LTE

**State the problem** (why you personally are concerned).

*The nation’s bees are dying off at a shocking rate, thanks in large part to a new class of toxic pesticides called neonics.*

**Describe the problem** in a way that makes it more real for the reader.

*Bees pollinate about 70 percent of the foods we eat. Without them, we’d have no apples, no tomatoes, no coffee, and no chocolate.*

**State the solution**, both generally and specifically.

*It’s time for the state DEP to ban neonics. Otherwise, our whole food supply is at risk.*

**Summarize:** Wrap it up with the final “why” – again, the more personal the better. A single, well-written sentence wins your audience.

*We need to save the bees and protect the food supply for our kids and grandkids.*

# Lobbying Decision Makers

Meeting with decision makers - otherwise known as lobbying - can help you understand their perspective on the issue so you can run a more effective campaign and, once you've done some work in the community, lobbying is a great way to let decision makers know about all of the support you have in their district for your campaign.

## Goal of a Lobby Meeting

- 1 Educate the decision maker.** Your meeting should educate the decision maker on your organization, and the issue. Don't assume the decision maker or their staff already know about the problem, or why your solution is the best one.
- 2 Build relationships.** Decision makers and their staff are people too! Beyond the immediate issue you're working on, you want to deepen your personal and organizational relationship with the decision maker. When meeting with a supportive target in particular, you may be working to persuade them to do more, but also get strategic information such as who the other key people to talk to are and what messages might be most compelling to them.
- 3 Convince the decision maker.** Rarely will you convince the decision maker on the merits alone. If being right was all it took, we wouldn't need to run campaigns! Make sure you come to the meeting with all of the petitions, media hits, business sign-ons, etc that you've collected so you can deliver them in person.  
  
You should also use the most compelling message for the decision maker. You may care about single-use plastics because of its impact on the environment, but the decision maker may care largely because it impacts tourism in their district.



# How to Run a Lobby Day

1

**Schedule Meetings.** Pick a day during the legislative session and start scheduling three weeks prior. This may be as simple as emailing a staffer or filling out a meeting request form on the legislators website.

Be sure to include a list of attendees, a brief agenda, and a link to more information about your group. If you don't hear back, send a follow-up email and call the front desk.

2

**Prepare for meetings.** Your team can have up to six students. Each person should have a speaking role covering a part of the agenda. Roles can include: a team lead to introduce the group, notetaker, someone who talked about the facts, someone who talks about the campaign on the ground.

Your group should do research on the offices you're meeting with in order to cater your asks and messaging, and practice each meeting beforehand.

3

**Prepare the logistics.** If meetings are happening online, make sure you have a video link ready and test it beforehand. Have digital petitions, website links, and any videos you want to show ready beforehand. If meetings are in person, make sure your team dresses professionally, arrives early, and brings any petitions or media hits you want to deliver.

4

**Hold the meetings!** Speak truthfully from your experiences and treat each staffer or elected official with respect. Remember that no one expects you to be an issue expert - you're a student not a think tank analyst. Write down any questions you don't know how to answer and get back to them later. Just going to these meetings and showing legislators that their student constituents care makes a big impact.

5

**Follow-up.** Send a thank you email with any follow-up information you promised. You can also thank the legislator for meeting with you with a Twitter post or an Instagram story (make sure you tag their official account).

You can also follow-up with invitations to upcoming events like joining an issue panel or speaking at a town hall on campus.

## SAMPLE AGENDA FOR A LOBBY MEETING

**Introduction,** thank the member for something like voting yes on a bill and for their time.

**Connect!** Learn more about the staff person or legislator your meeting with.

**Introduce your group / organization**

**Campaign ask**

Describe the problem and solution - tell a personal story if possible

Describe the campaign and support for the issue in your community (how many petitions you have, coalition sign ons, etc)

Make your ask - this could be a commitment to vote yes, co-sponsor the bill, write a dear colleague letter, etc

Wrap-up by asking the member to participate in an event on campus and taking a photo with them!



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