WHAT'S NEXT?
SUMMIT

What's Next Tour: Oregon

EVENING RECEPTION LOCATION

Saturday, July 16
5:00 PM – 7:00 PM

McMenamins Wilsonville Old Church
30340 SW Boones Ferry Rd
Wilsonville, OR 97070

MEETING SPACE LOCATION

Saturday, July 16 – Sunday, July 17

Hilton Garden Inn,
Kruse Room
14850 Kruse Oaks Dr
Lake Oswego, OR 97035

Saturday, July 16 | 10:00 PM – 4:00 PM

9:30 – 10:00	Registration and Breakfast
10:00 – 10:30	Welcome and Intro
10:30 – 12:30	Climate Change Issue Update
12:30 – 1:15	Lunch and Connect Discussion
1:15 – 2:15	Creating an Issue Campaign, Part 1
2:15 – 2:30	Break
2:30 – 3:30	Creating an Issue Campaign, Part 2
3:30 – 4:00	Debrief and Close

Sunday, July 17 | 11:00 AM – 2:00 PM

10:30 – 11:00	Registration and Breakfast
11:00 – 11:30	Welcome and Intro
11:30 – 1:30	What's Next Brainstorm
1:30 – 2:00	Debrief and Close

PART 1: ISSUE ANALYSIS

In this section, you will analyze where your issue currently stands and the ecosystem that already exists with that issue. This is the foundation upon which you will build your issue strategy.

The issue I am working on is:
_____

What I know about my issue:

	Yes	No
I know where decision makers stand on this issue	◯	◯
There is legislation on this issue at the state of local level	◯	◯
Partner organizations are working on this issue	◯	◯
I/my chapter has the capacity to work on this issue	◯	◯
There is community support for this issue	◯	◯

Provide more details about what you currently know about your issue in your community. For example, where do decision makers stand? Which partner organizations are working on this issue?

Using your answer above and the decision tree on Page 10, what action should you take on your issue?

ISSUE CAMPAIGN DECISION TREE

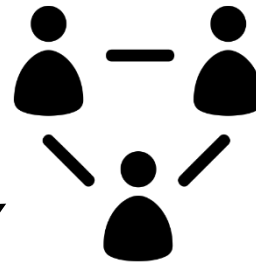**Question 1:** Where do decision makers stand on this issue?

For OR Against

Unsure

Question 2: Is there legislation?

Question 4: Are partner orgs working on the issue?

Yes

No

Yes

No

Question 3: Do you have capacity?

No

ACTION: Work with partner organizations

Question 5: Is there community support?

Yes

ACTION: Apply pressure to elected leaders

Yes

ACTION: Host community engagement events

No

ACTION: Find Another Issue

PART 2: CREATING AN ISSUE STRATEGY

DEVELOPING A STRATEGY

One of the most important parts of your issue ecosystem is your strategy, which informs your tactics and helps you craft a cohesive message. Think of your strategy as the roadmap to achieving your campaign's goals of building our movement and winning on the issues. The route you choose is based on your team's strengths and the motivations of the decision maker you want to influence to help achieve your campaign goal.

A strong strategic foundation clearly states the problem, what success looks like, your campaign objective, your target, target's motivations, and theory of change. If you can state your theory of change with confidence, you have a solid strategy and are ready to start planning tactics!

What does success look like for you and your team on this issue? *Remember: success does not necessarily mean winning on an issue campaign. Refer to "Win on Issue" point 2 on Page 25 and the decision tree on Page 26 for what success on an issue can look like.*

Issue Campaign Objective: *What does your campaign aim to achieve? Be as specific as possible.*

Targeted Decision Maker: *Who has the power to make the change you want to see, and needs to be persuaded to do so? Your campaign may rely on more than one decision maker, but it is okay to focus your planning around just one decision maker for now.*

PART 2: CREATING AN ISSUE STRATEGY

THEORY OF CHANGE

Your theory of change is an overall articulation of what your campaign will achieve, and why you believe it will be successful. In other words, a theory of change justifies the existence of your campaign. Use the following structure to build a succinct and plausible theory of change.

1. **W: The Problem you've identified:** The problem is W
2. **X: The policy solution your campaign will achieve; your campaign's objective:** To solve the problem, this campaign will achieve X.
3. **Y: The targeted decision maker:** The decision maker with the power to make X happen is Y.
4. **Z: The specific action you want the targeted decision maker to take:** This campaign will persuade Y (decision makers) to do Z by [insert your campaign's tactics and how they will send the message the decision maker needs to hear in order to feel motivated to take the action you propose].

Sample: Campaign Issue – Raise the Minimum Wage for all university employees to a living wage.

Employees of the university do not make a living wage, forcing many to take on a second job to make ends meet, which stands against our values as an academic institution. The President of the Board of Trustees has the power to solve this problem by approving a recent resolution to raise the minimum wage, brought fourth by the Board of Trustees. Our campaign aims to persuade the President to approve this resolution by sending the message that the vast majority of the University Community—students, employees, faculty, and community members alike-- wants her to do so. We will begin by hosting information sessions to inform students and community members about the issue and solution and build a list of supporters of the issue. We will use those sessions to build capacity for rallies, office visits, and press conferences that convey this message of support to the President online, in the media, and in person. Since the President is nearing retirement and has shown she cares deeply about preserving her legacy as President, we believe she will be persuaded by this message as communicated by these messengers.

PART 3: PLANNING YOUR TACTICS

Tactics are strategic actions you can organize to broadcast your message to others, and directly target the decision maker. Tactics include, but are not limited to: press conferences, issue roundtables, letters to the editor, signature drives, office visits, and digital targeting.

One tactic alone does not persuade a decision maker. It takes a combination of strategically planned tactics to ensure the decision maker and the people who have an influence over the decision maker hear your message. Hence, tactics must build upon each other and spread across a period of time, so the decision maker can see that your issue is in fact important and will not go away without action.

Use the tables on the next page to develop a tactics strategy for your issue campaign. Think about at least four tactics you can use in a period of time to broadcast your message through different mediums, and targeting different audiences. Use the examples below for ideas of tactics you could use. Keep in mind you can repeat tactics, so long as you keep it relevant enough to attract the attention of the decision maker you are targeting. *Refer to the issue ecosystem overview on Pages 27 – 28 for additional reference.*

EXAMPLES OF TACTICS

Earned Media Event: In many cases decision makers are very attentive to the press coverage in their local and regional markets because they know that such coverage both reflects opinions of the people they represent and influences the opinions of others. Earned media events can be any type of action events (i.e. roundtable, rally, film screening) where media outlets are invited. The events directly align with the campaign strategy, providing evidence of the theory of change argued by the supporters of the issue.

Press Conference: A press conference is another type of earned media event. The main difference between an earned media event and a press conference specifically is that a press conference exclusively presents the theory of change argued by the campaign through speakers. There is not necessarily an action involved. Hence, it is important that the remarks, location, and signage at the press conference express the main goal of the positions the campaign is advocating for. The visual and location should express in sound and pictures why the community supports our position on the issue.

Letters to the Editor: Decision makers represent many people, and letters to the editor are another way in which they can hear directly from another group of people and through a different medium. Letters to the Editor are more authentic and easier to organize than other tactics. Thus use this tactic in between more complex tactics to keep a continuous drumbeat of activity around your issue.

Digital Organizing: Digital organizing is important for two reasons. First, it is meeting people where they already are. Social media can help you spread the story of your issue campaigns that you can directly control. Sometimes despite your best efforts, no news outlet will come to your earned media event. However, if you do a good job telling the story of the action on social media through photographs and quotes, you can still succeed in getting the attention of the public and the elected official you are attempting to persuade.

PART 3: PLANNING YOUR TACTICS

TACTIC 1

Type of tactic:

Event title:

Description:

How does it persuade the decision maker?

How does it build capacity?

Target audience (type of people who should attend):

Attendance goal:

TACTIC 2

Type of tactic:

Event title:

Description:

How does it persuade the decision maker?

How does it build capacity?

Target audience (type of people who should attend):

Attendance goal:

PART 3: PLANNING YOUR TACTICS

TACTIC 3

Type of tactic:

Event title:

Description:

How does it persuade the decision maker?

How does it build capacity?

Target audience (type of people who should attend):

Attendance goal:

TACTIC 4

Type of tactic:

Event title:

Description:

How does it persuade the decision maker?

How does it build capacity?

Target audience (type of people who should attend):

Attendance goal:

PART 3: PLANNING YOUR TACTICS

Now that you have identified five tactics you want to use in your campaign, think through how you would sequence these events so that you are leveraging the capacity you have, while building the capacity you need at any given moment throughout your campaign. In other words, if you don't have a lot of people involved when you start your campaign, you'll want to start with tactics that can send a strong message to your decision maker—even without a huge crowd—while also getting signups from supporters you can involve in the campaign moving forward.

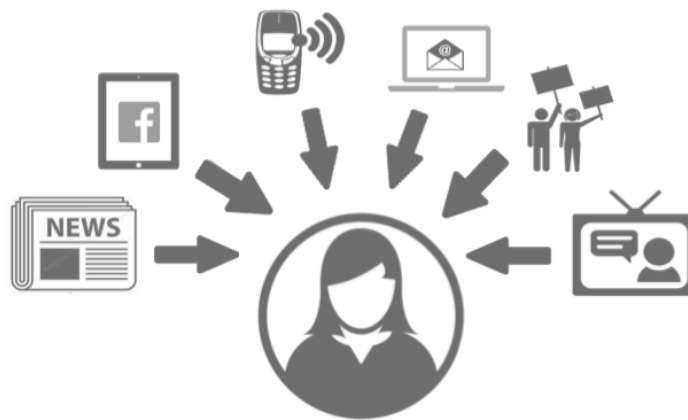|	Event Title	Ask(s) made at event
Tactic 1		
Tactic 2		
Tactic 3		
Tactic 4		

ISSUE ECOSYSTEM: OVERVIEW

An issue ecosystem is the environment surrounding a decision maker. The goal of an issue ecosystem is to create the conditions for decision makers to take action on the issue you care about.

Think about a fruit tree: the tree needs a lot of different conditions to line up for it to grow and produce fruit. It needs to be planted in an area with the right amount of sunlight, water, and nutrients in the soil—and it needs all of these things to work in tandem with one another. Even if the fruit tree receives plenty of water, but it's planted in the wrong soil and receives little sunlight, it will not grow.

Just like a fruit tree will not grow without the right combination of sun, soil, and water, a decision maker will not take action on the problem you care about without the right combination of tactics, voices, and messages. Here's why:

- *A variety of tactics*– Using multiple tactics—press, digital, and in-person—ensures that your message is heard by the decision maker and shows him or her that people who care about your issue are everywhere. Tactics that are strategically spaced on a calendar keep the issue popping on the decision maker's radar.
- *A variety of voices*– Multiple groups working on an issue shows more support for that issue and each organization contributes its unique voice to the conversation on the issue.
- *A message that appeals to the target's motivations*– All decision makers are motivated by something. It is the job of you and your partner organizations to figure out what that motivation is and how to appeal to it.

Decision makers are surrounded by many issue ecosystems every day. If you and your partner organizations are not part of an issue ecosystem around a decision maker, the opposition is filling that space with their message or the issue is not on the target's radar.

Another important aspect of an issue ecosystem is your ability to successfully and effectively work with coalition partners. In order to establish meaningful partnerships, you should identify your own strengths, and then combine those strengths with the strengths of your partner organizations.

ISSUE ECOSYSTEM: PROBLEMS AND POSSIBLE SOLUTIONS

Problem	Possible Solution
Issue does not have enough steam	**Choose your issue carefully and change takes time:** Organizing does not happen in a vacuum. While there are issues that you and others might be passionate about, there are others that might take priority at a given moment. This does not mean you stopped organizing around your cause. Instead, it means that you organize strategically, considering the broad political environment and mood. The more you fight for your issue, and the longer you expose your message, the more likely you will win on the issue. But that win takes time, as the political mood environment and mood changes.
No clear strategy or effective tactics	**Tactics must validate the strategy:** It takes a variety of tactics to create an effective issue ecosystem. That is, we cannot count on just one method of communicating with a decision maker to make the change we want to see. We need a combination of tactics—in the press, online, and in person—and a staggered calendar to keep our issue on a decision maker's radar. However, and equally important, your tactics and strategy must work together to reinforce the message. In other words, the tactics that you select must support your strategy, which achieves your goal.
Motivations of Key Decision Makers	**The motivations of key decision makers must be targeted:** Like all people, decision makers have certain motivations that influence the decisions they make. The best chance for a decision maker to take action on the problem we want to solve is for our issue advocacy work to appeal to his or her motivations. There are several possible motivations a decision maker could have—here are just a few: career and legacy, validation, and reputation.
No collaboration or coordination	**Stronger Together** The goal of working with partner organizations is using each other's complementary strengths to make progress on an issue. Building relationships with partner organizations and coalitions enables you to work effectively within an issue ecosystem and make the most of the strengths you have.
Tactics do not reinforce each other	**Organizing = One tactic leads to the other** If you organize a meeting or an event and there is not a clear follow-up activity, then you failed to organize. When organizing around an issue, make sure to plan tactics that help you build towards the next action.

OFFLINE AND ONLINE ORGANIZING TOOLS

Tool	Type	Description
Community Engagement Events	Offline	In order to achieve our goals of winning on the issues and growing chapter membership, we plan to provide a menu of civic engagement programs and tools that educate people on the issues and gives them a number of ways to take meaningful action. Events should tie into the work you're doing with your chapter on your issue. • *Community Service Project*– Service projects should fulfill an actual need in your community and are a great way to introduce potential new volunteers to the work you do. • *Panel Discussion/Issue Forum*– Discussions and forums educate people about and issue and create moments of collaboration with partner organizations. • *Social Impact Documentary Film Screening*– Film screenings provide an entry point for potential new volunteers and educate on an issue you work on while providing compelling, new content for long-time supporters
Partner Organizations	Offline	To win on the issues, we cannot go it alone. Allied partner organizations can provide vital intel on pending legislation, where elected leaders stand on the issue, and can link you to a whole network working on an issue you care about. Best practices for working with partner organizations: • Learn what common goals you share • Find out what tactics or events you can collaborate on • Share how you define success for this issue campaign • Find out in what areas you can support one another • Share what strengths each of you bring
Social Media and Email	Online	We often think of digital organizing and offline organizing as speaking different languages. The reality is that they are one language– organizing. Like all organizing tools, each platform has specific strengths and uses: • *Social media*– tells the story of the work you do from start to finish and contributes to the larger conversation that surrounds the issues we work on. Think of social media as a recruitment tool because it widens your pool of possible supporters by making them interested in what you're doing. • *Email*– Strengthens your network of supporters by through regular communication and conversation. Through email, you have the opportunity to build your case for your work and make low-bar asks.
Connect	Online	Think of Connect as your virtual field office– it is where you welcome volunteers to your work, nurture their development, inform them about what's going on, and provide meaningful action for them to take.

WHAT'S NEXT SURVEY

Organizing for Action is a long term movement that is about creating change in our communities across the country. We are in this for the long haul because our communities need organizers to fight for the issues we care about. This is about us. We are OFA and we decide what's next for our movement.

We need to hear from you as we collectively figure out the direction our movement takes. Spend some time reflecting upon where we've been and use the knowledge and wisdom you've collected to advise where our movement goes next!

First and last name: _____ **Email:** _____

In what years have you been involved in this movement?

○ 2007   ○ 2008   ○ 2009   ○ 2010   ○ 2011

○ 2012   ○ 2013   ○ 2014   ○ 2015   ○ 2016

As we continue our important issue advocacy work, what issues are important for us to work on?

○ Climate Change   ○ Immigration Reform   ○ Expanding Equality   ○ Gun Violence Prevention   ○ Health Care

○ Women's Issues   ○ Supreme Court   ○ International Issues   ○ Criminal Justice Reform   ○ Voting Rights

Is there another issue you would like to work on that is not listed above? Write it in the space below.

Is there an issue(s) that you worked on, or wanted to work on, that OFA does not organize around?

What do you think is Organizing for Action's greatest accomplishment?

Does your work with OFA make you feel civically engaged? If so, in what ways? If not, why not?

To what degree do you feel like elected leaders listen to people like you?

What motivates you to work in this movement?

What do you enjoy most about being a volunteer with OFA?

Are there barriers that prevent you, or people you know, from volunteering more?

What would you like to see OFA accomplish in the future?

What should our mission be in the future?

How do you see yourself involved in this movement in the future?

CONNECT

What is Connect?

Connect is a platform that helps progressive organizers find each other and take action in local communities. This is a powerful communication tool for committed organizers to create real and meaningful change in communities across the country.

Being a part of Connect is a great opportunity to stay in the loop with the latest OFA news and organizing updates, check on the progress of issue campaigns in your area, and take advantage of training resources to hone your organizer toolkit.

How can YOU use Connect?

Connect is a great way to gather information, but it's also important for you to be actively participating in the conversation. Here are some of the posts that you'll see on Connect:

- **Updates and Announcements**: You can view Connect to see volunteer updates, as well as announcements about changes in any issues or policies.
- **Call to Action:** We encourage you to post invitations to activities like phone-banking, rallies, film screenings, and other community engagement events. These events are great for getting to know other folks in your area, and build chapter capacity.
- **Report-Backs:** We love hearing about events that you have hosted or attended. Report backs are a great way to share updates on your local activity.
- **Best Practices**: Sharing best practices with your fellow volunteers gives them ideas on how to approach certain issues, and the tactics that work best in hosting events.

What are the groups?

There are three main types of groups on Connect:

- **National Issue Groups:** These are groups that focus on each of OFA's national issue areas and allow volunteers to engage in a national dialogue about important issues. It's a good place to post report-backs about events you have hosted and share **best practices**, empowering other volunteers to take action and allowing HQ to hear about the work you're doing.
- **State and Chapter Groups:** Volunteers get a chance to interact and engage with others in their area through state and local chapter groups. It's the place to post your community engagement event **invitations** or **updates and announcements**.
- **Specialty Groups:** There are also groups such as, "Fulfilling the Promise," or, "OFA Training," that might not fall into either of the two categories above, so they're considered to be Specialty Groups. They are usually more specific to target audiences, and allows volunteers to discuss issues that are more unique to their interests.