Annotated Agenda

**YOUR ROLE AS A SUMMER FELLOW**

We recommend that this module should take place early in your training.

**TIME ALLOTTED: 45 minutes**

**PRESENTER(S):**

**MATERIALS NEEDED:**

* Projector and PPT (usually)
* Flip chart paper
* Markers
* Scotch tape
* Optional: small pieces of paper for participants to write their self-expectations

**PREPARATION FOR THIS SECTION:**

* A large piece of butcher paper or section of wall where participants can tape their self-expectations.
* Label this section: expectations of yourself

**GOALS FOR THIS SECTION:**

* Participants have context for why their organizing work as Fellows will be important to OFA strategic goals
* Participants understand expectations of the Summer Fellowship program and resources available to them
* Participants set commitments and norms for their participation in the Fellowship program

**SKELETAL AGENDA:**

* Introduction and Goals
* Your legacy this summer
* Expectations for organizing fellows
* Fellows norm setting
* Next steps

**ANNOTATED AGENDA**

**0:00 – 0:02 Introduction**

0:00 – 0:02 Welcome and Personal story intro

* **[Slide 1]** [Trainer should share personal story as it pertains to the training. Don’t forget to use challenge - choice - outcome, and practice it just like you would any other part of the training!]
* That’s why I’m so excited to be here to talk with all of you about who we are as an organization.
* We’re going to get into a SUPER interactive activity right off the bat, but first, we’ll take a minute to review our agenda for this session.

**0:02 – 0:20 Your Legacy This Summer**

0:02 – 0:04 Your Legacy

* **[Slide 2]** This morning in our introduction we talked about the legacy that you will build this summer.
* You are Organizing for Action’s third class of Fellows, so what you do this summer will continue to build our movement.
* You have the opportunity to move OFA forward on each of our issue campaigns, to lay the foundation of this organization going forward by building chapters, and to make sure our issue priorities drive the narrative during healthcare enrollment.

0:04 – 0:05 Goals

* **[Slide 3]** So to lay out how we’re going to get there, in this session we’ll go over some of the nuts and bolts of this summer and what you’ll do with your time in order to affect this impact.
* Our goals for this session is that you will:
  1. Understand the programmatic objectives of the Summer Organizing Fellowship.
  2. Set personal objectives for what you want to gain from and contribute to the fellowship.
  3. Have next steps for getting started and being successful in your fellowship.

0:05 – 0:06 Agenda for this session

**[Slide 4]** So we’ll go through the sections that we’ll cover in this session.

* We’re almost through the introduction,
  1. Next we’ll talk a little more about the elements of the Legacy you’re going to build after this summer.
  2. Then we’ll talk about some of the nuts and bolts of the program and expectations for Organizing Fellows.
  3. After that we’ll talk together about setting norms for our statewide Fellows team.
  4. Then we’ll wrap up and talk about next steps from here.
* **[Animation cue]** So let’s go ahead and get started talking about how you’re going to build your Fellows legacy this summer!

0:06 – 0:09 Remember 2009?

* **[Slide 5]** Does anyone remember what was going on in American politics in August of 2009? [Let participants respond until someone talks about the debate over the Affordable Care Act.]
* **[Animation cue]** That’s right. As Members of Congress went back to their districts that August there were very contentious town halls, largely about passing Obamacare. Does anyone remember the dynamics of this debate and the people advocating on each side?
* [Let 1-2 participants respond until they talk about Tea Party (or similar) activists opposing the bill. Ask them if they remember the people advocating for health care and how they were portrayed in the news media? If anyone has personal experience with 2009, ask how they were balanced in real life.]
* These memories of 2009 are very helpful as we supported Obamacare enrollment efforts during the Fall of 2013 and Spring of 2014. Alongside the efforts of a number of coalition partners, OFA was able to contribute to the over 8 million individuals who successfully signed up for healthcare. You’ll also notice that we accomplished this, not by driving this narrative with yelling and intimidation, but rather with displays of positive issue organizing and mobilizing our neighbors.
* This approach will ring true this summer as you continue pushing forward on OFA’s issue campaigns – like comprehensive immigration reform, climate change, economic security, equal rights, and of course, continuing to spread more information about the successes of Obamacare.

0:09 – 0:11 4 years later…

* **[Slide 6]** Here is an example of how the tide has changed in 2014. A constituent in Rep. Heck’s district attended a town hall event and laid out a compelling argument about why the ACA is helping people like him. He was respectful, positive, and honestly curious as to why his member of Congress was opposed to a law that had been held up by the Supreme Court.
* Another important piece to remember about this… this constituent attended the town hall and only spoke for himself and the business he owned. Although he volunteers with OFA, he was not there as an official representative of OFA. This is a perfect example of how we are grassroots driven. Local volunteers can carry a powerful message that will have a significant impact on their member of Congress.

0:11 – 0:13 Reality and Perception

* **[Slide 7]** So let’s look back at this idea we discussed before lunch. Part of the function of issue organizing campaigns is to make sure that Members of Congress see the reality of their constituents concerns. We want to make sure that people on the ground are still talking about the agenda they voted for in November 2012, so Members of Congress know what their constituents really stand for.
* What is this reality we’re trying to make sure lawmakers perceive? **[Animation cue]** For example, that 90% of Americans support universal background checks before gun sales. That 70% of adults say climate change should be a priority for lawmakers. Millions of Americans are enrolling in affordable healthcare plans. And that business and families from both ends of the political spectrum agree that comprehensive immigration reform is vital for our economy and our future.
* But it takes more than polls to convince Members of Congress to do the right thing for their constituents. Our earned media and advocacy actions over the summer will paint a picture for lawmakers that support for the President’s agenda is passionate and strong right in their own backyard.

0:13 – 0:16 Your role this summer

* **[Slide 8]** Fellows will fill a variety of roles in OFA this summer, so when you meet with your manager you’ll hear more about your specific role. However, everyone will be taking these five primary organizing actions:
  1. Coordinating earned media events
  2. Digital organizing
  3. Recruiting volunteers
  4. Collecting stories, and
  5. Grassroots fundraising
* [**Slide animation]** All of these actions help to build chapters and further issue organizing actions! Your work will be critical in furthering the goals of our whole organization.

0:16 – 0:19 This summer will be intense!

* **[Slide 9]** So when I talk about a time of intense activity what types of actions do you think we’ll be taking? Let’s start with earned media events. Who has ideas of what types of events we may be doing to get earned media? [Take 2-3 ideas from the crowd until you have all or most of the responses on the slide.]
* **[Animation cue]** Yes, that’s great. We will do all these things to gather earned media for our issue.
* What about grassroots organizing? What types of things do you think we’ll do over the summer to mobilize our communities and get more volunteers involved? [Take 2-3 ideas from the crowd until you have all or most of the responses on the slide.]
* **[Animation cue]** Yes, those are all great ideas. [If they missed anything on the slide, mention it.] All of our actions are also opportunities to develop and expand our chapters. The last few months of enrollment will be a time when our organizing is in the news more, so more people will get interested in being involved.
* What about on the digital organizing front? What do you think we’ll do to amplify our organizing using digital tools? [Take 2-3 ideas from the crowd until you have all or most of the responses on the slide.]
* **[Animation cue]** Yes, you got it. [If they missed anything on the slide, mention it.] Digital is our best medium to make sure our story is always getting told on-message, so it’s an important aspect to include in our organizing.
* **[Animation cue]** The important thing to remember is that through all of these actions, we’ll also be building OFA chapters and developing volunteers to be leaders.

0:19 – 0:20 You will win this summer

* **[Slide 10]** This is a photo of Senator John McCain personally greeting some OFA volunteers who were holding an event to thank him for his support of gun violence prevention legislation. It is essential that we show bipartisan support for the issues we advocate for, and hold lawmakers accountable when they are not listening to the wishes of their constituents on these issues.
* We also have an opportunity through all this action to build chapters and develop volunteer leaders who will be able to continue issue organizing for the long-term.
* What does it mean to win this summer? When Members of Congress (and the media) look to their constituents, the story about healthcare will be that it is already working and new enrollees have great, affordable health coverage.
* Your work all summer will help OFA achieve these goals, and set up legislative victories in the summer and onward into the future.

0:20 – 0:20 Agenda slide

* **[Slide 11]** Ok, now that you understand the goal for your work this summer, let’s talk about some of the nuts and bolts of our Summer Fellow program.

**0:20 – 0:34 Expectations for Organizing Fellows**

0:20 – 0:23 What do these people have in common?

* **[Slide 12]** Who recognizes any of these historical figures and can tell me what they did?
  1. [Choose one person to talk about each figure. Should bring out the below relevant information, so the trainer should mention it if the participant does not.]
  2. [Far left is Cesar Chavez. Chavez was a farmworker who worked in the fields until 1952, when he was hired as an organizer for the Community Service Organization, a Latino civil rights group. He continued as an organizer for the rest of his life and eventually founded the union that became the United Farm Workers. For those of you whose first organizing role this is, watch it – it probably won’t be your last.
  3. [Next is Harvey Milk, whom many of you will be familiar with from the movie “Milk.” He became the first openly gay man to be elected to public office in California, when he won a seat on the San Francisco Board of Supervisors. Politics and LGBT activism were not his early interests; he was not open about his homosexuality and did not participate in civic matters until around the age of 40. Milk was posthumously awarded the Presidential Medal of Freedom in 2009.]
  4. [Right of the middle is a Martin Luther King Jr, arguably one of the most famous community organizers in our country’s history. Dr King was a minister. In that role, he held several community positions, including the Birmingham African American Committee that investigated injustice in their community. It was in that position that he ran the Montgomery Bus Boycott and never turned back as an organizer.]
  5. [Far right is Susan B Anthony. She was one of the important advocates in leading the way for women’s rights to be acknowledged and instituted in American law. Anthony was also an anti-slavery activist. In 1836, at age 16, she collected two boxes of petitions opposing slavery. In 1850, she read a speech by Lucy Stone, which catalyzed her to devote her life to women’s rights. For those of you in the room who consider yourselves shy, Anthony was very self-conscious of her appearance and speaking abilities. No matter who you are, you can become a great organizer.

0:23 – 0:25 Organizing is about empowering yourself and others

* **[Slide 13]** No matter your specific role as a Fellow this summer, we will all be organizing people in our communities.
* Can I have a volunteer to reach each one of these various definitions of community organizing? [Take three volunteers, one to read aloud each definition.]
* How do you think these ideas relate to being able to enact the policies that the American people voted for in 2012? [Take feedback from 2-3 people. Make sure the following is mentioned:]
  1. When people get together they have power to influence decision makers to listen.
  2. Empowering every-day people give them the skills to make change.
  3. The role of Fellows is critical to expanding our ability to organize and empower more people in our communities.

0:25-0:26 This summer you will become an organizer

* **[Slide 14]** This summer you will become an organizer.
* The goal of the Summer Organizing Fellowship is to make each and every one of you a master organizer so that you can unlock that potential in our communities’ and make the change the American people voted for in 2012 a reality.

0:26 – 0:27 Program logistics

* **[Slide 15]** So first the basics of the program.
  1. First, the program lasts from July - August
  2. Next, remember that while you are an OFA volunteer you represent OFA. And although we are an independent organization, because the media associates us with the Obama campaign, your actions will also be seen as a reflection on the President. Keep this in mind in all of your interactions, including on social media.
  3. Through the interview process, you’ve already indicated whether you are a part-time Fellow available 15 hours a week, or a full-time Fellow available 40 or more hours a week. It’s important that once you set your schedule with your point of contact that you remain consistent so that your team can count on you.
  4. Next, you’ll have a manager who is your primary point of contact with OFA. This person will act as your mentor and your coach, and might be a staff member or likely an experienced volunteer leader.
  5. And finally, there will be lots of opportunities for skill building and additional training as you go through the program. Your manager will also provide additional training for you so you can meet your personalized organizing goals.

0:27 – 0:28 Expectations of you

* **[Slide 16]** So let’s talk about some of the expectations we’re going to have of you this summer. Can I have the front row here read out these expectations, each person taking one?
* **[**Participants read from the slide.]
* Does everyone feel comfortable with these expectations? Thumbs up if yes, thumbs down if no, thumbs middle if so-so.
* Ok, looking pretty good. Let’s keep going so you know how OFA will support you meeting these expectations.

0:28 – 0:29 Expectations of us

* **[Slide 17]** Organizing is always a two-way relationship and whenever we ask something of you, we also know that you’ll be expecting something of us.
* Here are ways that your OFA team will support you in being successful in your summer fellowship. This time can I have each person in the back row read out one item?
* [Participants read from slide.]
* Ok, now how do people feel about taking on this challenge? Can I see thumbs again? [Look around the room.]
* Great.

0:29 – 0:34 Expectations of yourself

* **[Slide 18]** Ok, we have one more important set of expectations to discuss… what you are expecting of yourself this summer. Please take out a blank piece of paper to write these down on. We’ll take about three minutes for silent reflection so you can consider and write a response to these two questions:
  1. What do you want to get from the Fellows program?
  2. What will you contribute to OFA as a Summer Fellow?
* When you’re done writing your expectations, go ahead and come to the front here and get a piece of tape and tape them on the wall. Take a look at other fellows’ expectations and see if any resonate with you. Then you can go back to your seat and make a note of any self-expectations you want to add to your own list. [Give three minutes for people to come up and tape their expectations and read.]
* So, thank you all for sharing your expectations. This helps us know what you’re looking to get from the program and also what you’re going to give. We’ll keep these expectations up here if people want to look at them later.

0:34 – 0:34 Agenda slide

* **[Slide 19]** Next let’s take the spirit of these expectations and set some norms for ourselves.

**0:34 – 0:40 Fellow Norm Setting**

0:34 – 0:36 Organizer rules

* **[Slide 20]** To get our juices flowing, I want to share with you some of the baseline Organizer Rules. These were written out by the 2008 Iowa primary team and have been passed down to organizers ever since. Who can volunteer to read some [pick a row to read them so it moves quickly]?

0:36 – 0:40 Team Norm Setting

* + - * + **[Slide 21]** So that’s a good list to start. But we should make our own norms as fellows in our state. Who has some ideas of what rules to live by we should set ourselves? We’ll structure them as “we will” and “we won’t” statements [Draw a vertical line down the flip chart paper and write “We Will” on one side and “We Won’t” on the other.
        + [Take as many recommendations as you have time for and write them on the board.]
        + Ok, this is great. I’ll make sure your state coordinator/ lead has these and sends them out to all of you, so you can remember our own Fellow Rules to live by!

0:40 – 0:40 Agenda slide

* **[Slide 22]** So let’s just wrap up talking about next steps.

**0:40 – 0:45 Next Steps**

0:40 – 0:42 Next steps

* **[Slide 23]** Of course, we still have the rest of today’s training to complete, but let’s talk about how you’ll get started when you leave here today.
* You should have already received or you will be receiving shortly the name of your manager. Again, this could be a staff or experienced volunteer leader. Once you know who this person is, set up your first meeting so you can set your schedule and learn about your role. If you haven’t heard yet who this is, email the person who sent you your Fellows acceptance letter so they can connect you.
* Once you get connected to your manager, they’ll plug you into taking action and getting you any other training you need in order to be successful in your role!
* **[Slide 24]** As we wrap up, let’s just review our key takeaways from this session.

As a Fellow, your work this summer will play a critical role in moving forward OFA’s issue organizing goals.

Fellows will fill a variety of roles and will take these five primary organizing actions:

Coordinating earned media events

Digital organizing

Recruiting volunteers

Collecting stories, and

Grassroots fundraising

You have big expectations to fulfill this summer!

0:43 – 0:45 Q & A

* **[Slide 25]** We’ll answer as many questions as possible.
* If there’s any we don’t get to, write them down so you can follow up with your mentor or write them in your evaluation at the end of the day!