Annotated Agenda

**WHERE WE’VE BEEN AND WHERE WE’RE GOING**

We recommend that this module be the first module of every recruitment or introductory training for OFA.

**TIME ALLOTTED: 45 minutes**

**PRESENTER(S):**

**MATERIALS NEEDED:**

* Projector and PPT
* Scratch paper & extra pens/pencils

**GOALS FOR THIS SECTION:**

* Understand OFA’s mission and culture
* Become familiar with what OFA has accomplished and what’s on the horizon
* Understand the importance of the Obamacare campaign, which will be the top priority issue area this spring

**SKELETAL AGENDA:**

* Introduction and Goals
* OFA’s Mission
* Where We’ve Been and Where We’re Going
* OFA’s Structure
* Key Takeaways and Closing

**ANNOTATED AGENDA**

**0:00 – 0:04 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 – 0:03 Goals

* **[Slide 2]** So our goals for this session are that by the end you will:
  + Understand OFA’s mission and culture
  + Become familiar with what OFA has accomplished and what’s on the horizon
  + Understand the importance of the Obamacare campaign, which will be the top priority issue area this spring

0:03-0:04 Agenda for this session

* **[Slide 3]** We’re just about to wrap up our introduction.
* Then we’ll dive right into the OFA mission, starting with a super fun activity.
* Then we’ll take a minute to recap where we’ve been and look ahead at where we’re going,
* After that, we’ll talk very broadly about our national and state structure and where you fit in,
* And we’ll close with key takeaways.
* So with that, let’s jump into our mission!

**0:04 – 0:26 OFA Mission and Structure**

0:04 – 0:15 What is OFA through your eyes?

* **[Slide 4]** Okay, we are going to jump right in with an exercise!
* We’re going to take a minute to practice articulating what OFA is and what OFA does with an exercise called speed dating.
* Please don’t move until I say go.
* What we’ll do is have everyone in the room form two lines, facing one another.
* Then, one partner will have thirty seconds - no more, no less! - to explain what OFA is and what OFA does.
* After that, I’ll provide some additional instructions.
* Okay, so you have 30 seconds to move *silently* into two lines. Then, wait for the start signal.
* Okay - go! [Allow participants 30-60 seconds to move into two lines.]
* All right - is everybody ready? Okay, remember, you have 30 seconds to explain what OFA is and what OFA does.
* 3-2-1-GO! [Allow 30 seconds for participants to practice.]
* Okay - time’s up! Raise your hand if your partner had a really good explanation. Can you share with the group? [Call on one person to share their 30-second explanation with the larger group. If you are using a wireless microphone, bring the microphone to the person.]
* Okay, great, now we’re going to switch. So if you were listening last time, you’re going to practice this time. Remember, just 30 seconds.
* 3-2-1-GO! [Allow 30 seconds for participants to practice.]
* Okay - time’s up! Raise your hand if your partner had a really good explanation. Can you share with the group? [Call on one person to share their 30-second explanation with the larger group. If you are using a wireless microphone, bring the microphone to the person.]
* Okay, now we are going to switch partners. So, if you are [pick a direction, such as “facing me,” “standing with your back facing the wall,” etc], take one step to the right. Now you have a new partner.
* Okay, we’re going to try it again, but with an extra layer! This time, you’ll still have 30 seconds, but this time, you have to weave in your personal story. So it’s not just about OFA - it’s about OFA and YOU.
* Okay, so if you were listening in the last round, it’s time for you to practice. Remember, 30 seconds for defining OFA while sharing some of your personal story!
* 3-2-1-GO! [Allow 30 seconds for participants to practice.]
* Okay - time’s up! We’re going to share out, but we’re going to let the second partner practice first. So if you were listening, it’s time to practice. 30 seconds to explain OFA while using your personal story.
* 3-2-1-GO! [Allow 30 seconds for participants to practice.]
* Okay - time’s up! Raise your hand if your partner had a really good explanation. Can you share with the group? [Call on two people to share their 30-second explanation with the larger group. If you are using a wireless microphone, bring the microphone to the people.]
* Okay, great! Go ahead and take a seat.
* [Allow participants 30-60 seconds to move back to their chairs.]

0:15 – 0:20 How We Will Be Successful: Our Mission

* **[Slide 5]** Okay, a lot of you said a lot of the things we are going to cover shortly. Here’s a look at the four pillars of OFA
  + Empower– We are growing our movement from the ground up, finding and training the next generation of grassroots leaders
  + Educate– When we arm our training volunteers with quality information on the issues, they are able to take meaningful action
  + Activate– All of our actions focus on driving the conversation, influencing key decision makers, and engaging new and existing grassroots leaders in meaningful ways
  + Collaborate– In partnership with other organizations, we strengthen the progressive movement

0:20 – 0:22 What Organizing for Action is Not

* **[Slide 6]** Okay, now that we’ve defined our mission as an organization it’s important to clarify common misconceptions of who we are:
* First, we are not the re-election campaign. During the 2008 and 2012 campaigns, OFA was known as Obama for America. This is no longer the case – we are a non-profit focused on advancing the second-term legislative agenda of the President.
* In the same vein, we are not an electoral organization. OFA will not play any part in campaigns, local or national, regardless of candidate. This is so we can focus our resources and efforts solely on advacing the President’s second-term agenda.
* Finally, we are not a partisan organization. In fact, quite the opposite – we are always looking to identify unlikely allies who agree with the President’s vision on our priority issue campaigns. This means we partner with Democrats, Independents and Republicans who share our views both on the national and local levels. As an example, while we may have difficulty forming a national-level partnership with the National Rifle Association (NRA), we certainly look to partner with individual NRA members who agree with our belief that expanded background checks are good for gun violence prevention. These can make our events that much richer and more meaningful when trying to persuade a Member of Congress that our views match the views of their constituents.

0:22 – 0:23 In One Sentence: Who We Are

* **[Slide 7]** So here is the one-sentence version. It’s actually pretty simple. Does anyone want to volunteer to read this slide out loud? [Have a volunteer read the slide text out loud, and then repeat it.] That’s right: We are a grassroots organization dedicated to supporting the agenda Americans voted for on November 6th, 2012.

0:23-0:26 Our mission translates into three goals

* **[Slide 8]** You will get a lot more training on what goes into an effective, strategic issue campaign, but I wanted to frame the way we define success by showing you this visual.
* In order to support the agenda Americans voted for in 2012, we need to do three things, and they all depend on one another and can happen in a number of different orders.
  + We need to influence key decision makers. If we’re moving legislation through Congress, that means we need to influence certain Members of Congress to vote a certain way. If we’re promoting Obamacare, which we’ll talk about in more depth in the future, we need to influence consumers who could enroll in the marketplace, or influence the people whose advice those consumers listen to most.
  + Something that helps us influence key decision makers is shapring the narrative. What we’re really talking about here is having an impact on the conversation around a specific issue, be it in the news or on social media. We want the prominent headlines to support our positions, which oftentimes influences key decision makers in and of itself.
  + Finally, we need to build capacity. We need a strong, robust volunteer organization. We need to raise money to support our organizing efforts. We need to find locations where we can hold events. All of these things are part of creating a sustainable grassroots movement, which makes it easier to shape the narrative and easier to influence key decision makers.
* Now, why do we have these three things in this venn diagram?
  + The reason we have laid these three goals out like this is because we are most successful when we are doing all three of these things - but we can also make progress by doing just one at a time.
  + So over the long run, we want to build capacity, shape the narrative, AND influence key decision makers, in order to support the agenda Americans voted for in 2012, but we don’t have to do them all at once.
  + It’s also important that we don’t assume we need to accomplish one of these things before we can accomplish the others. For example, if we focus only on building a strong organization because we think we need to have all the resources and people in place before we can shape the narrative and influence decision makers - we will never get there.
* We will come back to this concept often, and it will make a lot more sense as you get more issue organizing experience, but I wanted to plant that seed now - that our three objectives are to build capacity, influence key decision makers, and shape the narrative around these issues.
* **[Slide 9]** With that, let’s go ahead and dive into where we’ve been and where we’re going!

**0:26-0:36 Where We’ve Been and Where We’re Going**

0:26-0:28 Our launch

* **[Slide 10]** Organizing for Action launched back in January of this year, where we held a national conference with over 4,000 people to talk about the future of our movement.
* This movement is about the people that are involved in it, and we wanted to make sure that our launch reflected this philosophy.
* At that time, all we knew was that we wanted to support the agenda Americans voted last year, and that we wanted to keep building grassroots power at the local level.
* We have come a long way since then, and built one of the most effective issue-based organizations in our country.

0:28-0:31 What we did over spring and summer

* **[Slide 11]** Shortly after our launch in January, we held our first National Day of Action on February 22.
* We were more successful than we ever could have imagined, and from there, went on to really shape the conversation around our key issue campaigns throughout the country.
* Here’s a quick look at what we accomplished this past spring and summer.
* **[Play video]**

0:31-0:33 We made history and won August

* **[Slide 12]** After a successful spring and summer, we started to realize just how much of an impact we could make.
* We got this crazy idea that we could actually WIN the month of August.
* In terms of the Congressional Calendar, does anyone know what major event happens in August every year? [Ask participants to share ideas.]
* That’s right - Members of Congress go on recess and go back to their home states and districts. Their job while they are there is to listen to their constituents and where they stand on the issues.
* For a lot of people, when they think about August Recess, they think about 2009, when the Tea Party was out at town halls in full force, and all the headlines were about all the people who were anti-Health Care Reform.
* So in 2013, we went into August with a plan. We set out to OWN August, and that’s what we did.
* **[Animation cue]** Our issues’ supporters completely drowned out the opposition, our volunteers earned a ton of media coverage, and the dominating narrative was in support of our issues.

0:33-0:36 August 2013 was a turning point for the organization

* **[Slide 13]** We did not let up on any of our issue campaigns.
  + We continued to change the conversation on Climate.
  + We continued organizing to make sure Washington knows that the fight to prevent gun violence is not over, and we are not backing down.
  + We continued organizing to push the House of Representatives to pass Comprehensive Immigration Reform.
  + But in addition to all of these issue campaigns that are focused on legislation, we launched our most prominent issue campaign, Obamacare, which is already a law.
* **[Slide 14]** We have had much success in our work. We changed the momentum on Obamacare. These were the stories that were in the press:
* **[Slide 15]** And these were not
* **[Slide 16]** We changed the conversation on climate. This graph shows the number of conversations on Twitter about Climate Deniers. There was a 176% in mentions of Climate Deniers on Twitter between 2012 and 2013.
* **[Slide 17]** Our Members of Congress can’t say no one cares about comprehensive immigration reform.

**0:33-0:44 Our Organizational Structure**

0:33-0:36 Our National Structure

* **[Slide 18]** First, let’s talk about our national structure, starting at the Headquarters level.
  + Jon Carson is our Executive Director, and he oversees six main departments.
  + The four core departments that will be at the forefront of supporting you are Grassroots, Issues, Development, and Digital.
  + The Digital department houses the email team that helps support a lot of your big events, a web team to manage the website and the new tools that will become available over time, and a team to manage our presence on social networks to make sure as many people as possible have a point of entry into OFA.
  + The Development team houses fundraising staff who each cover a different region of the country, mostly dealing with higher dollar donors, and recruiting them to the national board of trustees. They also have a grassroots fundraising director, who works with the Grassroots team to make sure you have all the resources you need to be effective in grassroots fundraising in the states.
  + Our Issues Department keeps track of all the different pathways to victory for our different priority issues. They have a campaign manager for each of the key issue campaigns, and they also handle national political relationships, so that wherever possible, they can also connect you with local coalition partners.
  + And the grassroots department is your direct line of support.

0:36-0:38 Our Organizational Map

* **[Slide 19]** The grassroots department is built to be a lean, mean volunteer machine.
  + We have 5 Regional Directors, who each form and shape the program for their respective regions based on the unique needs of each state.
  + Each region is also supported by a Deputy Regional Director, who works directly with the State Coordinators and State Leads like [name of State Coordinator or State Lead in this state] here in [state].
  + **[Animation cue]** The State [Coordinators/Leads] are here to support the volunteers organizing in chapters. On the slide, you can see which states currently have a paid State Coordinator (green star) and those that have a volunteer State Lead (red star).
  + And then we have you, our Fellows, who will work closely with chapters to help us build capacity and execute successful issue campaigns.
  + **[Animation cue]** It is worth noting that OFA has over 200 chapters nationwide, with [# of chapters] here in [state].

0:38-0:41 Our State Structure

* **[Slide 20]** So now that we have a sense of the national mission of the organization, I want to take a minute to talk about our state:
  + First let’s talk about how three levels of organization will work together in our structure.
  + Every state will have a state lead or state coordinator who works with national HQ to make sure efforts in state coordinate with each other and with the national organizing strategy on each issue campaign. As part of this state structure, volunteers – and in limited cases some staff – will also help in providing resources to chapters and teams in the state, and will coordinate with statewide allied organizations to create strategic coalitions on our issue campaigns.
  + Chapters will be formed to coordinate actions that impact a larger area, for example an entire city or media market. Volunteer leads at the chapter level will coordinate the actions of neighborhood teams, and provide leadership training and resources for their members to empower them to take initiative in their issue campaigns.
  + Neighborhood teams will continue to play a role in the structure, executing issue organizing actions that impact just the neighborhood team’s community. They will provide their members training on organizing skills the team utilizes. Also, an important function of neighborhood teams will be to contribute to chapter-wide actions, often taking responsibility for aspects of large events.
  + Of course, it will take time to develop all these levels of organization so some states will have only one or two levels of this organization to start. Form will follow function in how this organizational model is built in each state.

0:41-0:44 Our Volunteer Structure

* **[Slide 21]** However, it is our volunteer structure that is the most important piece of our organization. Without it, none of the other parts of the org chart would have a purpose.
* Chapters organized by local volunteers who know their communities are the backbone of the organization.
* We will dive much deeper into the volunteer structure later today, but here is an example of how we organize our chapters in a state – specifically, here is how OFA is organized in [your state].
* You’ll notice there are [# of chapters] chapters statewide – in [list locations of chapters].
* These chapters are comprised of many individuals who have worked with previous iterations of OFA, as well as new volunteers who are looking to get involved in their communities by working on the important issue campaigns the President has set forward.
* Because securing earned media and press is one of our top tactics, you’ll notice that many of our chapters have also strategically developed to align with media markets, as denoted by the differently-shaded regions on the map.
* For example, our [list location] Chapter will host big events to secure press in the greater [same location] area media market, which is shaded [corresponding color] on the map; and so on and so forth.
* This allows our chapters to have the greatest impact – for example, by hosting successful, large-scale events that will be aired in one media market, as opposed to several smaller events in the same media market that may not secure as much positive coverage. That is, when appropriate, the volunteers in our state’s communities will often work together as a chapter rather than duplicating their neighboring volunteers’ efforts.
* **[Slide 22]** So with that, let’s move to key takeaways.

**0:44 – 0:45 Key Takeaways and closing**

* **[Slide 23]** Here are some key takeaways to highlight from today’s session about Who We are at Organizing for Action.
  + Organizing for Action is a grassroots organization dedicated to supporting the agenda Americans voted for on November 6th, 2012.
  + Grassroots volunteers are the most important part of OFA and are the power behind our organizing.
  + We win issue campaigns by building capacity, shaping the narrative, and influencing key decision makers in every state.
* So with that, I’ll turn it over to [trainer name] to talk about [next module]!