

## OFA COACHES HUDDLE

# Fall Fellowship Program

### Phase 1: Recruitment and selection

As fellows leaders, you will be reviewing applications, conducting interviews, and will make final selections.

<b>8/14</b>	Application launches
<b>8/24</b>	Interviews begin
<b>9/12</b>	Application deadline
<b>9/19</b>	Interviews conclude
<b>9/19</b>	Offer letters released

### Phase 2: Orientation and curriculum implementation

Fellows leaders will organize orientation trainings for newly-accepted fellows. After their orientation training, fellows will participate in weekly webinars for six weeks. Fellows leaders will check-in weekly with their fellows.

<b>9/23</b>	Orientation trainings (HQ staff will deploy to selected cities)
<b>9/27</b>	First fellows webinar—online program begins (every Wednesday thereafter)
<b>11/1</b>	Last webinar—online program concludes
<b>Nov-Dec</b>	Community Engagement Events—fellows must hold a community engagement or mobilizing event in order to graduate from the program

### Phase 3: Debrief

Fellows leaders work with one another and the training team to assess what worked well and discuss opportunities for improvement.

<b>Nov</b>	Fellows leaders submit program assessment
<b>Nov</b>	Debrief interview with training team

### Program metrics and expectations

The Community Engagement Fellowship has two important goals at its core:

- 1) Coach, train, and empower new organizers
- 2) Grow and support OFA chapter structures

## **Fellows leaders will be able to accomplish both of these goals by meeting these metrics:**

### **Plan and organize one orientation training**

The purpose of the orientation trainings is to welcome fellows, introduce them to the logistics of the program, as well as the curriculum, and begin building a community of learners. Fellows leaders will receive guidance and training to plan and lead these events on September 23. Selected cities will receive in-person support from OFA staff and/or alumni trainers. You'll be notified via an email from Bobby if your city is chosen.

### **Onboarding goal: Metrics vary by program**

Each fellows leader will receive a fellows onboarding goal—the number of fellows each leader is responsible for bringing to the program. Goals were set considering the following criteria: local demand, management structure, and historical data. We expect to onboard an average of 8 fellows per fellows leader for the fall program. However, our priority is quality over quantity. Select fellows that are committed to the program and likely to graduate. Work with Bobby to adjust your goals if needed.

### **Plan and organize one in-person meeting around the middle of the program**

To increase retention, fellows leaders will organize one in-person meeting with fellows around the middle of the program. This is an opportunity for fellows to re-connect and build their relationship with one another, assess their learning growth, and review their program goals.

### **Graduation goal: 80% of onboarded fellows**

Fellows leaders are expected to graduate 80% of their on-boarded fellowship class. Fellows leaders will work closely with the training team to learn leadership tactics that can increase retention rates.

## **Expectations for fellows leaders**

**Weekly meetings:** Fellows leaders will attend check-in meetings every Tuesday from August 23 - November 7. All meetings will be online at 7:30 p.m. CT.

**Weekly assessments:** Fellows leaders are expected to submit weekly reports assessing their program. The data collected will help the training team provide necessary resources and support.

**Weekly fellows check-ins:** In order to provide adequate support to fellows, fellows leaders are expected to meet with their class—either on the phone or in person, at least once a week.

**Review fellows homework assignments weekly:** Fellows leaders should provide coaching, constructive feedback, and direction to their fellows on their assignments each week. Feedback should be both written and verbal.

## **Fellows curriculum overview**

Fellows will participate in a total of six online courses or webinars, beginning on Wednesday, September 27. Webinars are live every Wednesday at 7:30 p.m. Central. The webinar series will prepare them to organize community engagement events from start to finish. They will also learn basic organizing tactics that will help them plan, recruit, carry out, and

debrief the event. They are expected to work with your local chapter to run a community engagement event by the end of the program or shortly thereafter. Fellows who miss an excessive number of webinars and do not complete assignments with their team will not graduate from the program. If they must miss a webinar, they should tell you as their fellows leaders, and make sure to watch the class recording the day after.

#### **Community Engagement Events • 9/27/2017**

Understand what community engagement events are and examples of event types. During this session, fellows will decide which type of community engagement event they will organize by the end of the program.

#### **Action Planning Sessions • 10/4/2017**

In this session, fellows will become familiar with the process to plan a successful community engagement event. They will learn best practices and key lessons to lead a group of volunteers to plan and organize the event.

#### **Event Management • 10/11/2017**

Keeping track of all the moving pieces that go into an event can be challenging. In this session, fellows will learn management tactics and tools to delegate responsibilities and ensure tasks are completed on time.

#### **Recruitment: Grassroots Tactics • 10/18/2017**

In this session, fellows will learn grassroots best practices for reaching out to supporters and volunteers and inviting them to the event.

#### **Recruitment: Digital Tactics • 10/25/2017**

In this session, fellows will learn strategies for online recruitment. Following this session, they will be able to effectively tell the story of their event online.

#### **Tying It All Together • 11/1/2017**

In this session, fellows will integrate the different organizing tools you have learned throughout the program to implement their community engagement event.

## **Managing the learning journey**

The fellowship curriculum will train fellows to organize community engagement or organizing events, which they are expected to implement by the end of the program, or shortly thereafter.

### **What are community engagement events?**

Community engagement events function as entry-points for people who are concerned about an issue, but may not know much about it or more importantly, what to do about it. Here are three examples of types of community engagement events that can engage new people on the issues: film screenings, speaker series or panel discussion, and community service projects.

#### **Film screenings**

Documentary films are powerful tools to educate people about an issue. The audience can identify, and often empathize with the people in the film who are coming forward to tell their story. Following the screening with a discussion allows participants to get even more information on the issue they came to learn about.

### **Speaker series**

This type of event is useful when you want to dig in on an issue and provide more in-depth information from a speaker or speaker(s) who have some experience with the issue. Speakers may include, community leaders, public servants or elected officials, authors, faith leaders, coalition partners, etc.

### **Community service**

Community service projects are a great entry point to bring together your neighbors and groups for the greater good of improving your community. It lays the foundation for finding common ground on the issues you all care about, thereby, opening the door to conversations that may lead to future actions. These events can range from creating a community garden to upgrading a community center with solar panels.

### **What are mobilizing events?**

Mobilizing events function as events where people take direct action around an issue and the goal is to recruit others to join in that action. Here are six examples of mobilizing events:

#### **Earned media**

A key strategy for persuading elected officials on an issue is to bring their attention to the broad public support or opposition that exists for the issue you are working on. You can use earned media to get your issue covered in the local press—and in front of your elected leaders. When we say “earned media,” we mean stories that run as news in a local newspaper, blog, radio, or TV station. They are “earned” because an event was planned that was newsworthy enough to be covered by one of these sources—this is the opposite of paid media (such as advertisements).

#### **Signature drives**

Signature drives are a tactic we use to raise awareness and build support for an issue in our communities. It is where you ask people in the community to sign up to show their support or opposition on an issue, such as Obamacare, climate change, or gun violence prevention.

#### **Phone banks**

Phone banks are an important and vital way to recruit for events, as well as spread a message to fellows constituents and make asks of them. It is also a good way to engage organizers who have not been involved before.

#### **Elected office visit**

The ultimate goal of organizing around the issues you care about is to persuade elected officials to support your position on those issues. Meeting face-to-face with him/her or a staff member is an opportunity to share your personal story with the people who represent you. They make decisions based on what they hear from their constituents, so meeting with them in person helps to them understand your point of view and starts to build a relationship on trust.

#### **Town hall meetings**

These events are opportunities for constituents to interact directly with their elected officials and their staff, ask questions about where they stand on issues, share concerns, and press for answers on policy proposals, legislation, and their stances on upcoming votes.

#### **Community action meetings**

A community action meeting provides a space for people to meet, discuss the issues that are important to the community and could include recent actions taken by Congress or a specific need that needs to be addressed

locally. These meetings bring people together to determine next steps as a group and seek to build a network of community members—providing an outlet for people to channel their energy in a positive way.

### **Which type of issue and event should my team choose?**

The beauty of the Community Engagement Fellowship is that your fellows will determine as a team what issue they wish to organize around, define what success will mean for them, and from there, what event best fits those needs.

For example, if you live in an area where mobilizing events are not effective, then consider a community engagement event to educate people about a specific issue. On the other hand, if you live in a place where you can influence your elected official, then a mobilizing event may better fit the mold.

We look forward to the issue you and your team choose to work on, whether it be on the local, state, or federal level.

*Note—OFA is a non-partisan, issue advocacy organization with a mission to engage leaders and communities to build long-term organizing power around progressive issues. We are a 501(c)(4), which means we cannot coordinate with any political party or engage in any electoral work.*

## **Discussion: Managing the learning journey**

Now that you have reviewed the curriculum, it's time to begin planning how you will lead your team. In groups, discuss the following:

- 1) What are the top issues currently affecting your community? Are they local, state, federal issues?
  
- 2) Which of these issues do you think will be most effective for you and your fellows to organize a community engagement event around?
  
- 3) What kind of community engagement event do you think is most effective for organizing around that issue and why?
  
- 4) Think of the 4 steps below, then take the community engagement event you'd like to work on with your fellows and go week by week through the fellows webinars, deciding how each week will be used to plan, recruit, execute, or debrief:

# Planning / Recruitment / Execution / Debrief

Week 1

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Week 2

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Week 3

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Week 4

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Week 5

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Week 6

## Planning your orientation

Use this agenda to determine the time of your training and assign trainers to each session. As you formulate your agenda, consider the following recommendations:

**Determine your training time:** The orientation training should not last more than four hours. This time frame will help you keep fellows engaged and excited without overwhelming them with information. If your training venue permits, we recommend you begin your training no earlier than 10:00 a.m. and conclude at 2:00 p.m.

**Assigning trainers:** There are a total of 4 training sessions. We recommend fellows leaders lead the following two sessions: Welcome to the Family: We're OFA and Planning Your Learning Journey. If an OFA staff member or alumni trainer is assigned to attend your training, they should lead the following session: Sharing Your Personal Story. Otherwise, you should assign that session to chapter members, volunteers, and/or former fellows in your area. (all OFA staff and alumni will be prepared to lead the personal story session).

## Discussion I: Orientation logistics

Use the checklist below to review the tasks you will need to complete for your 2017 fall fellows orientation. If you are working as a team, please be sure to explicitly define which member will own each role.

Date to complete	Person responsible	Task
		Identify four proposals for fellows orientation venue—think about cost, technology, size of the venue, WIFI, parking, and proximity to your fellows
		Identify costs associated with the each venue proposal
		Secured and locked training location
		Stipend request due: Based on the number of fellows you have accepted, determine the amount of money you will be requesting to help implement your orientation  <i>Note: You will be sent an expense form where you will enter your estimated expenses in regards to venue, food, printing, and logistics. Please be aware that we will be communicating with you about the amount that you can expect to receive, so should not make commitments to spend money beforehand.</i>
		Have the keys to the location, or have coordinated with someone at the location so that the training team can set-up for training and cleanup afterwards
		Determined the room set-up for the training and lunch
		Secured a projector and screen to lead the training
		Trainers received their training materials and are ready to review and practice their modules
		Scheduled a run-through for all trainers
		Have received an approval for a stipend from HQ and purchased food for the training
		Have received pre-approved stipend and coordinated printing
		Have confirmed training participants both via phone and email

## Discussion II: Digital goals

Working with your group, review the tick-tock (detailed agenda) for your orientation training. Together, brainstorm how you will collect digital content and what you will need to meet your digital goals.

### Digital goals:

- Every fellow has a Twitter account
- Take candid photos
- Create a Twitter list
- Profile new fellows

### Tick Tock

### Task: What needs to happen during this session to meet your digital goals?

### Owner: Who will complete this task?

Set-up

E.g.: Tweet a picture of the training team hanging signs in the training room. Use #OFAFellows (Goal: Set an example for fellows that they should be tweeting during the event!)

Sarah

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Set-up

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Check-in

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Module 1: Welcome and intro

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Module 2: We Are OFA

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10-minute break

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Module 3: Sharing Your Personal Story (over lunch)

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10-minute break

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Module 4: Planning Your Learning Journey

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Module 5: Debrief and Close Goodbyes



## Discussion III: Curriculum planning

Knowing the curriculum, take a moment to review your training team and begin planning:

- Who will be responsible for each module?
- By when should they review the material?
- When will you schedule a run-through of the day to practice?

**Use the table below to type training session times and assign trainers to each session:**

<b>Duration</b>	<b>Session</b>	<b>Trainer</b>	<b>When will they have reviewed?</b>
45 Mins	Welcome and Introduction		
45 Mins	We Are OFA		
10 Mins	Break		
90 Mins	Sharing Your Personal Story (Lunch in between)		
10 Mins	Break		
30 Mins	Planning Your Learning Journey		
15 Mins	Debrief and Close		

**What date and time is your run-through going to be?**