Community Organizing on Shale Gas

A Clean Air Council Guide

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About this Guide

Organizing local campaigns may be one of the most effective ways to create meaningful change on the issue of shale gas development. Clean Air Council has worked with dozens of groups to help community leaders tackle shale gas issues affecting them. This guide is a response to local leaders who expressed an interest in learning organizing skills to better respond to an ever-expanding industry, and to learn about different approaches being used successfully in Pennsylvania communities.

Leaders and organizers are constantly face with urgent permit deadlines and project proposals, and often do not have the luxury and time to wade through stacks of organizing manuals or toolkits. This guide includes simplified explanations of key organizing skills, guidance on how to build a local campaign, and resources for use in the field. The Council included specific examples of what has worked in the field. It is important to recognize that there are many other ways to develop and think through your campaign. Be sure to choose a process that works for you and your community.

About Clean Air Council

Members of the Protect Our Children Coalition meet to discuss strategy. Photo from Michael Bagdes-Canning, used with permission.

Clean Air Council is a member-supported, non-profit environmental organization dedicated to protecting everyone's right to breathe clean air. The Council is headquartered in Philadelphia and works through public education, community advocacy, and government oversight to ensure enforcement of environmental laws. The Council has members throughout Pennsylvania, and works on issues across the state. Please visit cleanair.org for more information.

1 Developing a Campaign

What is Community Organizing?

Members of the Protect Our Children Coalition work on power mapping. Photo from Michael Bagdes-Canning, used with permission.

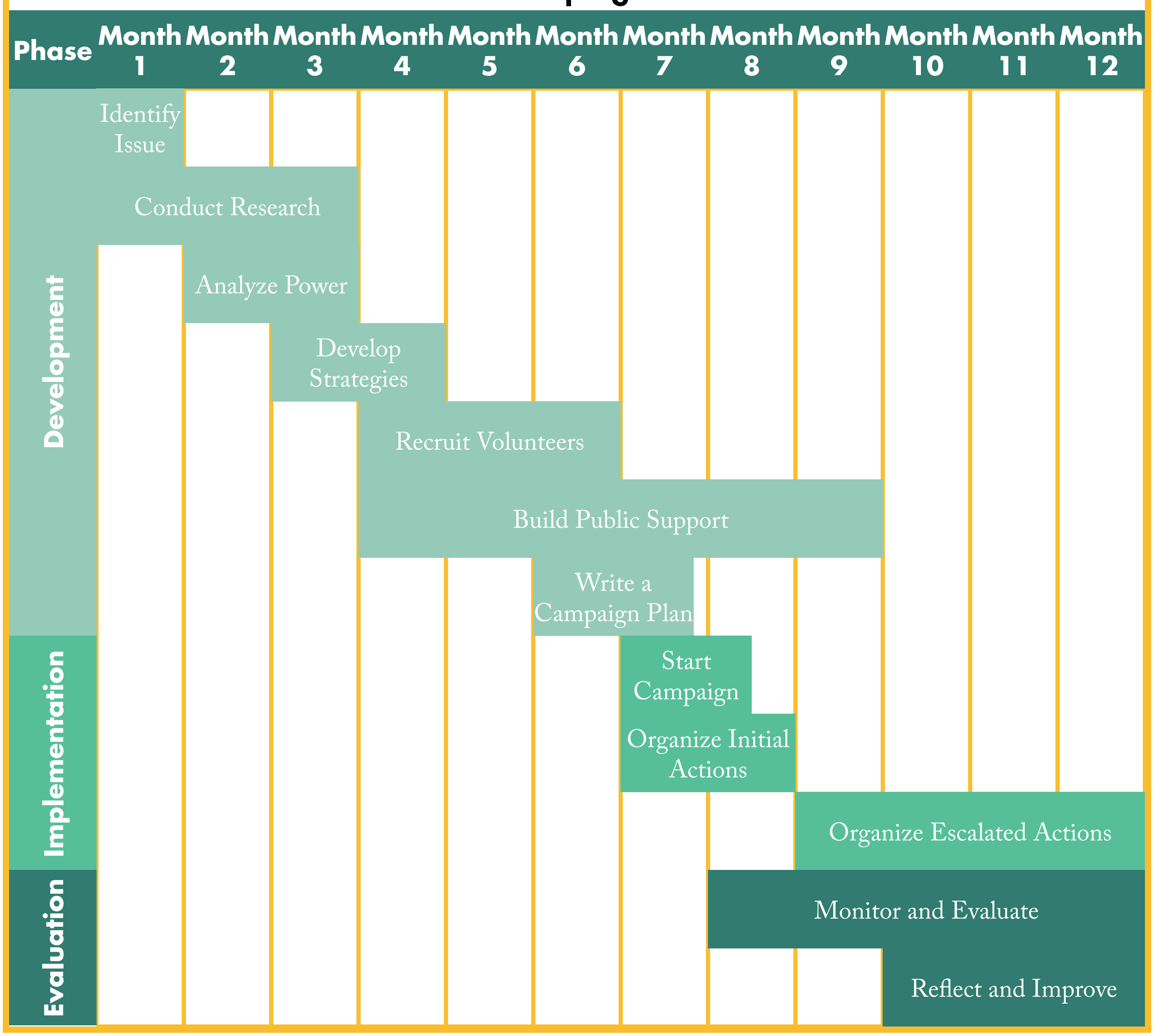
Organizing is when people take collective action to advance a common goal. A campaign is when members of a community strategize about how to influence someone with power to make a decision that helps meet the community's specific goal. Campaigns involve planning a set of related actions with a clear timeline to achieve a goal.

Phases of a campaign

Issue campaigns can be broken into three distinct phases: development, implementation and evaluation. The timing of each of these phases is based on the local circumstances that surround the campaign, and you might find that your group has to re-visit some of the components of each phase as needed.

In the Council's organizing experience, one of the quickest ways to flesh out your campaign plan is to agree on a goal and create a power map (see page 6). These two steps answer important questions about who to target, what to ask for, and potential strategies to explore.

Generic Campaign Timeline



Developing a Goal

SMART test

Your campaign goal is the ultimate result you need to achieve that will successfully address your issue. Campaign goals must pass the SMART test:

- Specific
- Measurable
- Ambitious
- Realistic
- Time bound

An example of a goal that passes the SMART test is: Achieve a 50% emissions reduction in Volatile Organic Compounds (VOCs) at natural gas compressor stations in our county by 2015. Notice that the goal does not explain how the group will achieve it, but it includes all of the information necessary to evaluate whether or not the goal is ultimately achieved. This goal easily passes some of the SMART goal criteria because it is specific (one type of pollutant at a specific type of shale gas infrastructure in a specific county), measurable (50% reduction of VOCs), and time bound (complete the goal by 2015).

Most of the discussion about potential goals will focus on whether or not your group's goal is ambitious enough (or too ambitious), or if it is even realistic. Those criteria can be more accurately determined by evaluating your group's own assets and capacity to take action and by evaluating the political context in which your group wishes to achieve the goal. For instance, if your goal is related to passing legislation related to fracking and shale gas infrastructure, your group should question whether the current Pennsylvania Legislature would be the most realistic option for achieving any type of environmental or public health protections.

It is best to determine a goal as part of a team process with a diverse group of people that is representative of the impacted community. There are many ways to lead the discussion, but there are two activities explained in detail below that can assist you in getting the group to develop the most appropriate goal. After either of these activities, you can use the SMART tool to evaluate your draft goal statements.

Community visioning activity

This visioning exercise focuses on big-picture thinking about what types of changes people want to see in their community related to shale gas infrastructure. While the ideal version of your community may not be achievable in the short term, the group's vision is a starting point for figuring out potential campaign goals that could eventually lead to a community achieving the vision.

1. Depending on the size of the group you're working with, break up into smaller groups of 3 – 4 people.
2. Ask groups to draw or describe what it's like to live with natural gas infrastructure in their community right now.
3. Allow the group to work for about 10 – 15 minutes if possible.
4. Next, ask groups to draw or describe how they would like their community to look in an ideal world (still in the context of shale gas).
5. Allow the group to work for about 10 – 15 minutes if possible.
6. As the group leader, listen in on group discussions to ensure that everyone is participating and that the group is staying on track. If the groups are large, you can ask one person to volunteer to be the facilitator and one person to present their ideas back to the main group.
7. Invite each group to share their ideas to the rest of the larger group. Ask them to describe the main differences between the existing and ideal drawings and what types of things they could do to move towards the "ideal" community vision.
8. Ask each group to write ideas from the previous step on paper so that they can later be used to develop a goal statement.

An example of a community vision from a Pennsylvania group is:

"To protect regional air quality and health of [our community] from potentially harmful air emissions released through the processes of shale gas extraction, production and transport."

This group's vision to protect air quality and public health set the stage for volunteers to set a more specific goal focused on how to work towards reduced air pollution from fracking infrastructure.

Newspaper headlines activity

The following exercise is good for exploring a more specific goal statement that would help a group work towards the broader vision defined in the previous activity.

1. Depending on the size of the group you're working with, break the participants into smaller groups of 2 – 3 people.
2. Ask each group to develop a newspaper headline for 2 years in the future that would show what you'd like your group to ideally achieve on the issue of shale gas development.
3. Allow the group to work for about 15 minutes.
4. Listen in on group discussions to ensure that everyone is participating and that the group is staying on track. If the groups are large enough, you can ask one person to volunteer to be the facilitator and one person to agree to present their ideas back to the main group.
5. Invite each smaller group to share their ideas to the rest of the larger group.
6. Ask each group to write these ideas down on flip chart paper to help develop a goal statement.

Develop goal statements

1. Ask the small groups to take their headline and try to make it into a good goal statement by adding the specifics and checking to see how realistic it is.
2. Write out the goal statements from each group on a large sheet of paper so that the entire group can see it.
3. Use the SMART tool described above to evaluate each goal.
4. Depending on how many goal statements remain after evaluating, ask participants if the goals are similar enough to attempt combining certain elements into one goal or different enough that the group needs to choose one. If the group decides to pick one goal statement, you can use a scoring matrix (see Appendix) to analyze the pros and cons of each one, or the group could do a simple voting process.

Analyzing a Campaign Target

A target is a specific person (or group of people) who has the power to make the decision that achieves your goal. It is usually the person (or people) who makes a final decision, although it could also be someone below the top decision-maker who has a lot of influence on the final decision. A target may be very obvious or may require some research. For instance, in shale gas infrastructure campaigns, targets may be midstream or pipeline companies, local elected officials like mayors or township supervisors, state agencies like the Department of Environmental Protection (PA DEP) or the Pennsylvania Legislature. Power mapping (explained below) can be used to identify a campaign target. The campaign demand can often help you identify the appropriate target. The information about what makes your decision-maker tick in general, who influences them, and what makes them change their mind should be the focus of your power mapping and research.

Power mapping activity

Your group should consider forming a subcommittee to power map the target and develop potential strategy options.

The following are step-by-step instructions on how to lead a power mapping activity. Power maps can be used in two ways. One way is to figure out who the target of a campaign should be if it's not already obvious. The second way is to figure out who influences the target and what leverage points your group might pursue.

Supplies needed: markers, paper, and Post-It notes.
Time allotment: 1 hour

1. Break people into groups of 4 or 5.
2. First, make sure the group has determined its campaign goal (see page 4).
3. Explain that a power map can be used to determine potential targets for a campaign goal or to determine who has the most influence over the target.

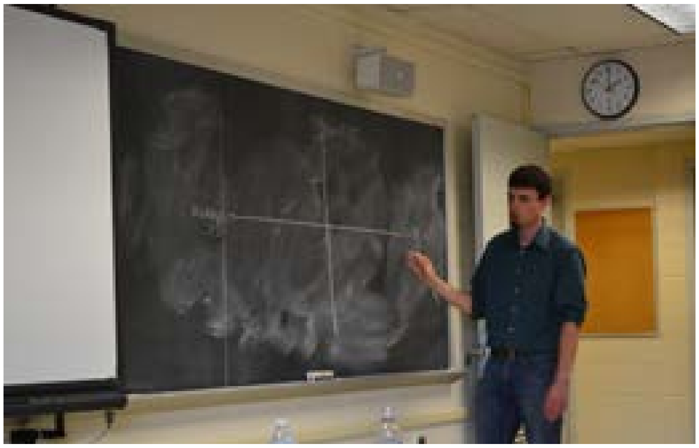


Photo from Michael Bagdes-Canning, used with permission.

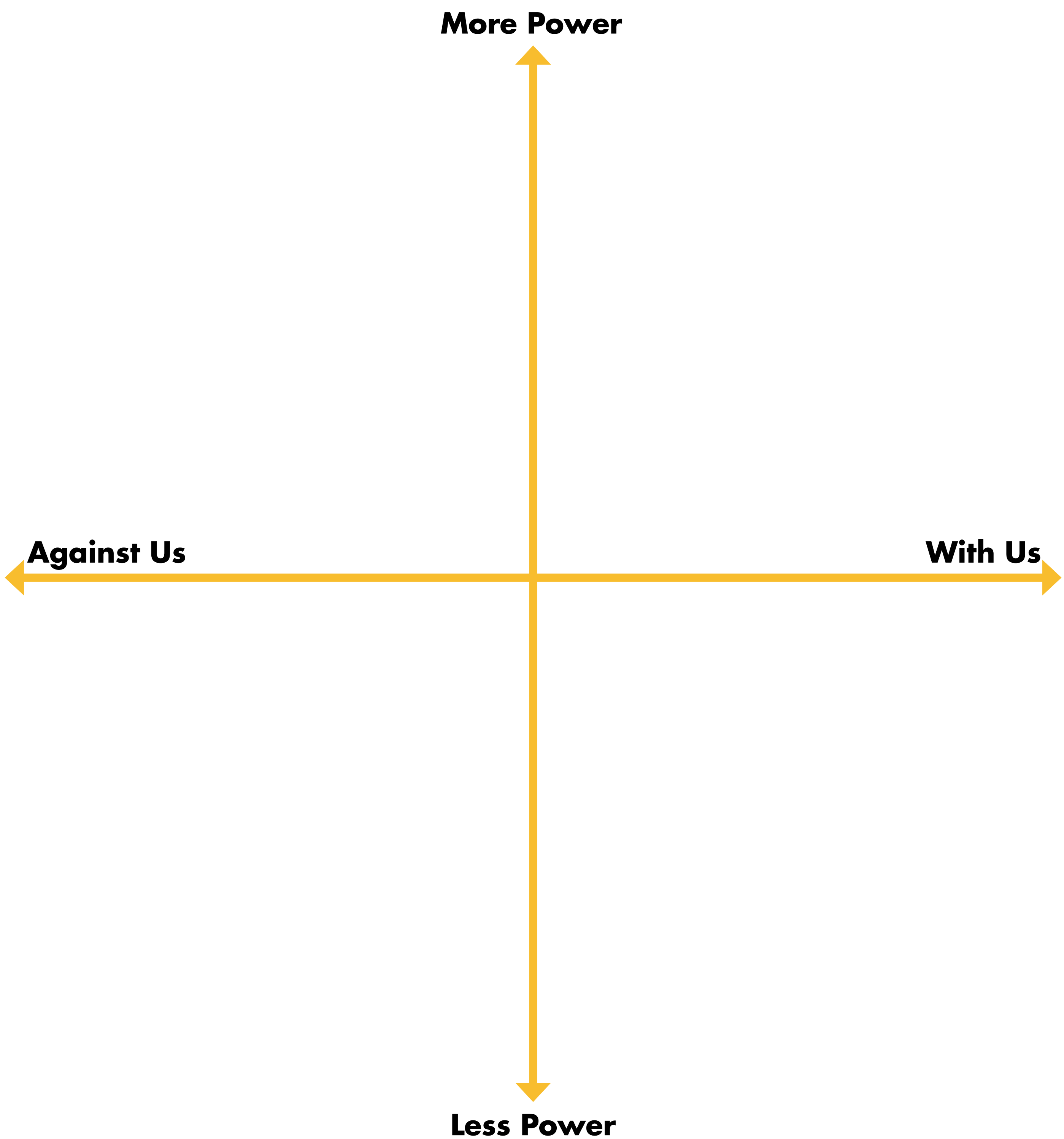
Map #1 – Who has the power to give us what we want?

Ask the group to:

1. Draw out a power map grid (see page 7).
2. Use Post-It notes to list organizations or people who have influence on the campaign goal and issue (write one stakeholder per Post-It note).
3. If you have one, place your group on the map or place yourself on the map.
4. Identify the people or group with the most influence over your goal and place their Post-It note on the map (this may take some discussion and moving around of notes).
5. Place all of the Post-It notes around the grid according to each stakeholder's level of influence on the goal and whether or not they support or oppose your campaign goal.
6. Draw connections between different groups or individuals and the target and each other to show the connections and relationships (write words to describe if helpful).

Power Map

Fill in the chart below according to the directions in either the Map #1 or Map #2 activity.



Map #2 – Who has influence over the target?

Ask the group to:

1. If your group started with Map #1, re-use the Post-It notes from your first power map or begin this process if starting with Map #2.
2. Write the target's name at the top of the sheet as a title: "Power map on ____"
3. Place the notes on the paper according to how much influence they have over the target. Think creatively about professional, personal, community networks or people that may have influence. Write new Post-It notes if needed and place them on the map.
4. Draw connections between different groups or people with the target and each other to show the connections and relationships (write words to describe if helpful).
5. Think about groups or individuals who are connected with or who have influence over the groups and people already on the power map. Are there particular family members, religious leaders, or colleagues that have a lot of influence on the target's decision-making process? Write these new names down and place these post-it notes on the map in the same way as before (most or least influence and opposing or supporting your goal). Look for areas that have a lot of connections with the target and identify the stakeholders who exert the greatest influence over the target.
6. Identify whether your group could influence any of the stakeholders who have influence over the target.
7. Brainstorm different ideas for leveraging groups or people that could influence your target.

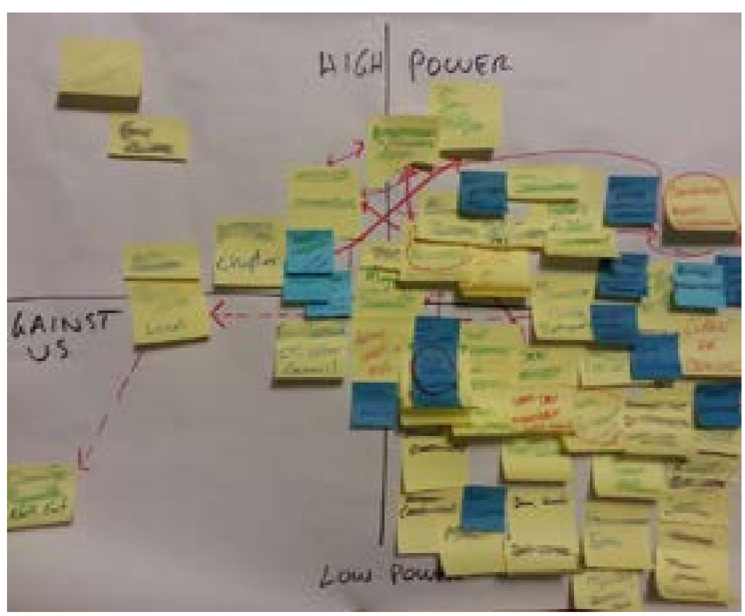
In one campaign the Council worked on, organizers learned that gas companies weren't going to listen to local residents, but that they might be influenced by state elected officials and the local Chamber of Commerce.

Additional target research

Now that your group has determined the campaign target and figured out who might influence them, you should research some key questions about the target based on historical evidence. Online news is a good place to start, but also make sure to reach out to groups or people you know who have experience with the target to ask for their insight. Your group can use the worksheet on p. 37 in the appendix to organize your research.

Try to answer the following questions:

1. Where does the target get their power?
2. What is the target's self interest and/or self-motivation (both broadly and on this issue)?
3. Has the target changed their mind in the past?
   - *If so, what caused him/her to change positions?*
4. Have any groups ever launched campaigns on your target?
   - *If so, what strategies worked and what did not in the past?*



Example of a complex Power Map. Photo from Clean Air Council.

Determining Campaign Demands

What is a demand?

After your group has agreed on a campaign goal and identified a target, you'll need to figure out the specific demand or "ask" of the target. What is the program, procedure, policy, or action you want to create or change to achieve your goal? A demand is typically a concrete measurable request you can make to a specific person or small group that would fix the problem.

How to determine demands

To figure out the specific campaign demand, you may need to work with a larger network of people to make sure there is broad support for it in your community. You might also consider reaching out to third-party groups or organizations for things such as technical expertise. Your group will probably have to do some in-depth research on the policies, politics, laws, and other factors that relate to your issue in order to get a good handle on what the demand could be. This initial research is best done by a smaller research subcommittee who can develop a list of possible demands. With a larger core group of leaders, try to narrow down the options to two or three possible demands. The subcommittee that first researched the potential demands should present them to a larger group representative of the community and discuss the pros and cons of each one. Try to vote on or come to consensus on one demand that makes the most sense for achieving the group's main goal. Some discussion about strategy is appropriate during this stage because the types of resources and skills that people in your group bring to the table could affect the type of demand you choose.

Determining Community Strengths

Determining your group's strengths

Once your group power maps the target and settles on its campaign demands, group members should determine the strengths of their own group using an assets inventory exercise. The exercise highlights the skills and experiences that individuals in the group can bring to a campaign, rather than focusing on a community's needs. Often, groups of people find that they might have a lot more collective resources than they would have guessed. The analysis of what moves your target to make a certain decision combined with your own group's capabilities should drive the main strategy that you ultimately decide to use.

Erie residents perform an assets inventory for an off-shore wind campaign. Photo from Clean Air Council.

Assets inventory exercise

An assets inventory is a specific process for determining group strengths and resources in order to determine the best course of action on a campaign. The following describes types of assets and step by step instructions on how to lead an assets inventory exercise.

1. Review the group's campaign goal and ask if there are any questions about it.
2. Set up areas for small groups to work and, if available, place markers or pencils, Post-It notes or index cards, and some large sheets of easel paper at each station.
3. Depending on the size of your group, divide participants into groups of no more than 4 people and have them sit around the materials.
4. Ask each group write down the following 5 asset categories across a poster board or sheet of paper: individual, groups, institutions, physical, and economic.
5. Ask groups to write/draw examples of their own individual strengths or skills, experiences, or passions. The following phrases are an easy way for people to start thinking about their own individual strengths.
    - "Gifts of the head" (things they know something about and would enjoy talking about or teaching others)
    - "Gifts of the hand" (things they know how to do and enjoy doing)
    - "Gifts of the heart" (things they care deeply about)

    Ask groups to place their words or pictures under the "individual" category on the large sheets of paper. (allow 7 minutes for them to write or draw as many assets as they can).
6. Ask groups to write or draw examples of voluntary associations, clubs, and social networks in their community (allow 7 minutes for them to write as many assets as they can). Ask people to place their words or pictures under the "groups" category on the large sheets of paper.
7. Ask groups to write/draw examples of formal institutions and professional entities in their community that might support the campaign (allow 7 minutes for them to write as many assets as they can). These could include businesses, government bodies, or non-profit organizations with a staff and budget. Ask people to place their words or pictures under the "institutions" category on the large sheets of paper.
8. Ask groups to write/draw examples of land, buildings and other local physical resources that could be used in the campaign (allow 7 minutes for them to write as many assets as they can). Ask people to place their words or pictures under the correct category on the poster board or large sheets of paper.
9. Ask groups to write/draw examples of economic resources in their community (allow 7 minutes for them to write as many assets as they can). Economic resources can include "what people produce and consume, businesses, informal economic exchanges, barter relationships…" (Snow 2011). Ask people to place their words or pictures under the "economic" category on the poster board or large sheets of paper.
10. Next, ask each group to use all of the assets on their paper to create a project or program that would achieve the group's defined goal. Allow about 10 minutes.
11. Share (1 or 2 people share the group's project ideas with the entire group).

Snow, L. (2001). The Organization of Hope: A Workbook for Rural Asset-based Community Development. Chicago: ACTA Publications

Selecting a Strategy

Once you've completed the power map and the strengths inventory, your group can use the Strategies Checklist tool below to narrow down the strategy options to a short list based on what you know about the campaign target and whether or not your group has the capacity and resources necessary to use and implement a particular strategy. A subcommittee should try to narrow the options down further by reviewing the group's capacity and the findings from the group's target research. The subcommittee should discuss the potential outcomes of taking one approach over another. After having thought through the strategy options carefully, the subcommittee should present the options back to the larger group.

What strategy should we use?

A campaign strategy is a plan your organization crafts to help you achieve your goals. The approach that your group chooses should reflect the skills and resources your group brings to the table and be paired with what would realistically move the campaign target to make the decision that would achieve your group's goal.

In one campaign the Council worked on, organizers discovered that the campaign target paid particularly close attention to opinion pieces or letters to the editors published in newspapers the target read. Since Council staff are adept at writing media pieces and knew that the target also listened carefully to religious leaders, organizers decided to use a media strategy using messengers the target would listen to. On several occasions after reading published articles, the target's staff called Council organizers to discuss our concerns.

Campaign Strategies Checklist

The strategies checklist (below) gives a quick glimpse of the main types of campaign strategies to help evaluate if your group has the capacity to implement a particular approach.

Direct Action Strategy. Are we able to do the following?

- Turn out a large number of people.
- Get the target into a room with us.
- Control the agenda and the target. This step requires advanced constituent leadership and a large team of leaders who can each play a specific role.

Disruption Strategy. Do we have the following?

- A core group of leaders and a broader membership base who are willing to confront and challenge the power of the state, police, or security officers, and at least some of whom have experience doing so.
- A well-informed, trained, and disciplined membership.
- A strong tactical team of leaders who can make quick decisions and negotiate with authority figures.

Minieri, J., & Gestos, P. (2007). Tools for Radical Democracy: How to Organize for Power in Your Community. San Francisco: Jossey-Bass.

Campaign Strategies Checklist, Continued

Legislative Strategy. Do we have the following?

- The ability to move people in decisive legislative districts to move their own legislator.
- Enough people in enough districts to get a critical mass of support for the legislation.
- The ability to move legislative leaders, such as committee chairs.
- A staff person or leader who can dedicate the time needed to follow up with legislative staff on the status of the legislation and related matters.
- Leaders that have the skills to negotiate and compromise over policy issues.
- Knowledge of the process for city, state, and federal budget development and bill making.
- The ability to write legislation or relationships with groups who could help do so.
- Time to work the resolution of the issue through the slow process of legislation adoption.

Advocacy Strategy. Do we have the following?

- Access to targets, policy makers, and decision makers.
- Knowledge about what is happening in the field or in the community that shows our credibility as community representatives.
- The capacity to do effective research and to develop easily understandable policy recommendations (either internally or with outside assistance) that deal with our issue.
- A target who responds to rational and good-government arguments as opposed to ideology.
- A base of organizational power that will make the target listen to your ideas.

Alliance-Building Strategy. Do we have the following?

- The ability to compromise and negotiate with other groups working on the issue.
- The ability to bring some people or resources to the table and be able to use them when needed.
- The ability to find other groups that have power, want to work on our issue, and will make it a real priority for their organization.
- The membership support to move slowly on an issue and devote time to sharing control with other institutions.
- Members and leaders who can regularly participate in alliance-building activities.

Media and Public Education Strategy. Do we have the following?

- A comprehensive media plan with clear goals and objectives, including target audiences and a clear message.
- Organizational capacity and commitment to deal with the multifaceted components of implementing a media plan.
- Leaders and members who can deliver a message about complicated issues in understandable sound bites to both reporters and live audiences.

Legal Strategy. Do we have the following?

- An in-house legal team or a partner organization that has expertise in legal matters.
- A leadership and board that is willing to integrate a legal strategy into the campaign.

Deciding on Actions

What are actions?

Actions are the specific activities your group will do to move the target or decision-maker to give your group what you want. The actions your group chooses should be based on the strategy you have selected, and should focus on creating opportunities to influence the target outside of the normal public process. Public hearings, community meetings, and zoning hearings are examples of effective venues for advocating your stance, but actions that are part of an issue campaign typically engage the target outside of these normal regulatory processes. Public venues could also be used as a platform for implementing campaign actions designed to pressure specific decision-makers.

When the Federal Energy Regulatory Commission (FERC) approved the Cove Point natural gas export facility despite public outcry, a group of 25 impacted landowners and supporters engaged in civil disobedience by blocking FERC's office for the day. This shut-down stopped office operations, brought more attention to the issue, and galvanized supporters.

The target research subcommittee should revisit some questions about the target to brainstorm potential actions.

Try to answer the following questions:

- How does the target think, act, and react to things and why?
- What has moved the target on issues in the past?
- How many people in your group have participated in this type of action before?
- How many people are needed for each action?
- What types of resources are needed for each action?

Ask the subcommittee to brainstorm two possible actions that would 1) advance your strategy, 2) use your group's capabilities, and 3) move your target. Actions should be planned out along the timeline and trajectory of your entire campaign in a way that starts with low-hanging fruit actions. Organizers should then escalate the type of action used if the decision-maker is not budging. The smaller subcommittee should present ideas for actions to a larger group and get approval. Ideally, the main points of your campaign should be written down on paper as a plan you can refer to in order to monitor progress and make changes along the way.

Action Activity Chart

You can use the chart on the opposite page to help choose the best actions for your campaign. In the first column, rank the most appropriate actions for your group to take on your issue based on campaign strategy. In the second, determine which actions the target is most likely to respond to and which ones are likely to be ineffective. In the third column, list any actions you know have been effective in the past.

Action	Activity	Is the activity appropriate?	The target's response?	Was it successful?
Sit-in	Wait in an office and stay until you get what you want.			
March	People walk together past a location significant to your campaign target.			
Press conference	Hold a meeting for the press about an issue, report, or action.			
Blockade	Occupy a space to change the function or stop activity.			
Boycott	Ask people to stop patronizing a service or buying a product.			
Strike	Walk out of a job, school, or other place in protest.			
Rally	Gather people in a public space with speakers talking about an issue.			
Demonstration	Show opposition through action at a strategic location.			
Picket line	Disrupt entrance to a building to discourage people from entering.			
Street theater	Publicly perform a skit, song, or reading about an issue.			
Flyering	Hand out flyers to educate the public about an issue.			
Town hall meeting	Public meeting about an issue in the community.			
Accountability session	Public meeting where target is asked to give clear answers.			
Building or office takeover	Take over an office to stop it from functioning.			
Call-in day	Many people call a target on one day to compel him/her to act.			
Disrupting public meetings	Disrupt public meetings to prevent them from functioning.			
Banner drop	Drop a banner with a message in view of the target and media.			
Civil disobedience	Knowingly break the law to raise awareness of the issue.			

Inspired by list found in:
Minieri, J., & Gestos, P. (2007). Tools for Radical Democracy: How to Organize for Power in Your Community. San Francisco: Jossey-Bass.

Creating a Timeline

Chart your course

Once your group has set a clear goal and completed both an internal and external analysis through an asset inventory, powermap, or similar tools, you should be well-positioned to start laying out your anticipated work on a timeline.

1. Draw a big horizontal line on a large chalk board, dry-erase board, or roll of paper.
2. Determine the length of time it will take to achieve your group's goal. Write the current month and year at the start of the timeline on the left side. Write the anticipated month and year for achieving your goal on the right side. Draw a short vertical line above the start and end date to mark the date.
3. Next, figure out the approximate spacing for each month based on the start and end dates of the campaign and write each month on the timeline with a short vertical line to mark the date.
4. Ask your group to think about what major milestones or accomplishments would need to occur in order to achieve your campaign goal. Discuss the milestones together as a group to make sure that the milestones you select represent major events or achievements that would allow your group to advance toward the next milestone and eventually your campaign goal.
5. Ask participants to write down the major milestones on large Post-It notes and place them where they think the group can realistically achieve them. While participants can try to talk about the entire campaign milestones before committing anything to paper, it's often easiest for groups to think about one milestone at a time before discussing the next one. Encourage your group to write ideas for milestones down and place them on the timeline and allow flexibility in moving the Post-It notes around throughout the exercise.
6. Once your group is satisfied with the timing of each milestone, ask participants to determine the tasks that would need to be accomplished to achieve each milestone. The tasks should advance your group toward achieving the related milestone. Write these tasks down on smaller Post-It notes and place them on the timeline where they would need to be completed.
7. Review the milestones and tasks and encourage participants to make appropriate adjustments.
8. Review each task and determine which subcommittee or ask group members to volunteer to be responsible for working on the task. Ask group members to write their names on the tasks for which they have volunteered.

Erie residents completing a timeline for an off-shore wind campaign. Photo from Clean Air Council.

2 Recruiting Members

Introduction

One-on-one meeting between Clean Air Council staff and affected residents. Photo by Nina Berman, used with permission.

A large part of building a community group and running a successful campaign involves recruiting and keeping volunteers or members. Whether canvassing to petition your township supervisors to protect a school from fracking or trying to recruit a potential volunteer, your group has to recruit potential members that will eventually grow the organization and help implement campaigns. The following section covers some different ways to think about recruiting someone to work on shale gas issues. Your group's goal, internal capacity, and overall strategy will determine whether you need to ask a lot of people to take an action quickly, if you can spend more time building relationships with potential community leaders, or both.

Your group should continuously recruit new members and volunteers.

Canvassing

Canvassing or door-knocking can be an effective option for gauging the level of interest in your group or campaign and recruiting new members or volunteers to your group. Short meetings can also occur in other settings, such as community events where people are already gathered.

Be prepared

Know your group's mission or campaign and be able to give a short 30-second explanation of who you are and what you're working on. In about 5 to 10 minutes, you should be able to introduce yourself and your group's issue and learn about a person's concerns and interests. You should consider why the person you are talking to would have a personal interest in your work. How does your issue or goal relate to their lives and how could the person potentially benefit from participating in your work? Think of different volunteer opportunities that you could offer to a prospective member, but also be ready to think up some volunteer positions on the spot that would match the person's skills or interests.

Introduce yourself

- Explain who you are and what group you are with. "I am. We are. This is. We want."
- Start by finding a connection:
    - Are you a neighbor with the same problem?
    - Did a neighbor or someone respected in the community refer you to them?
    - Mention one of your group's successes.

Explain yourself

- Why are you at the door tonight? "To find out what you are concerned about."

Find out about

- Personal interest in the issue.
- Concerns about the issue.
- Special skills he or she might be able to contribute to the group.
- Useful contacts.
- Organizational networks.
- Ask about potential meetings with his or her networks or contacts.

Listen and ask good questions

- Ask open-ended questions (ones that can't be answered with yes or no).
- If you get an "I don't know" response, try to give examples of other people's concerns to see if the person is having similar experiences.
- Example questions:
    - How long have you lived in the neighborhood?
    - What are some changes you've seen?
    - What do you like about the neighborhood?
    - Is there anything about your neighborhood that you'd like to see changed?

Brown, M. (2006). Building Powerful Community Organizations: A personal Guide to Creating Groups that Can Solve Problems and Change the World. Arlington, MA: Long Haul Press.

Bobo, K., Kendall, J., Max, S. (2010). Organizing for Social Change: Midwest Academy Manual for Activists. Santa Ana, CA: The Forum Press.

Engage and call to action

- State the problem as your group defines it (i.e., polluting industry, unhealthy air).
- Highlight the impact of the issue (public health is hurt while companies make a profit).
- Try to reach an agreement that something should be done.
- During the conversation, try to think about how you could suggest tasks that match the group's needs the person's interests or talents.
- Get a commitment from the person to volunteer to do a specific task by a specific time.
- Call to Action/Solution:
  - *Explain your group's campaign and how it addresses the issue.*
- Ask for contact info (phone, e-mail, mailing address).

Assess potential

- What is the person's likelihood to get involved?
- Write notes or use numeric scoring to rate the person's interest.
  1. Very likely (engages in dialogue, deeply concerned).
  2. Maybe (personal interest in the issue, but no deep connection to collective action).
  3. Unlikely (gives contact info but expresses little interest, has no time, or would rather address issue on their own).

Follow up

- Enter contact info into a database.
- Call people that showed interest within 24 – 48 hours.
- Follow up on comments the person made.
- Try to turn your lists into active volunteers (see below for more information).
- Introduce new members to others at meetings or events in order to make them feel part of the group.

General tips for canvassing:

- Sound confident by knowing the subject.
- Start with the main point rather than the history of your group or specifics of the issue.
- Explain why your group is reaching out (i.e., strength in numbers, to increase the group's skills and power).
- Explain why you want them to join the group, why you joined the group, and how it would benefit them.

Minieri, J. & Gestos, P. (2007). Tools for Radical Democracy. How to organize for power in your community. San Francisco, CA: Jossey-Bass.

One-On-One Conversations

The "one-on-one" conversation is designed to develop a relationship with leaders or potential leaders in order to learn about their values. The long-term goal of such meetings is to learn about a person's values so that you can determine how the leader could contribute to your organization or campaign. The bottom line is that if you build a strong professional relationship with someone, it may eventually produce a new volunteer or board member. This type of meeting is an art form that you learn by doing over and over again. One-on-one meetings should last no longer than 30-35 minutes.

Learn about the other person

- What motivates this person? What are they interested in?
- What can they bring to the group?
- What are their values about civic engagement?
- What is their approach to social change?
- Is there a potential connection between this person and your group?

Questions to ask yourself after the meeting

- What was the person's level of interest in social change?
- What could they contribute to building an organization?
- Was there trust between us?
- Is there anything about this person's life that would prevent them from participating?
- Should I follow up with this person? If so, how?
- Does this person have conflicts of interests that might harm the group's credibility?

One-on-one tips

- Be yourself. Relate to topics being discussed, but don't take over the conversation.
- Introduce your organization generally, but don't try to sell it.
- Discuss what it means to be a member of the group.
- Ask for a specific commitment.
- Listen 80% of the time, talk 20% of the time.
- Be genuinely interested in who the person is.
- Use brief questions to encourage conversation.
- Think about a list of potential tasks someone can do for the group.
- Keep simple records (3 x 5 cards) after the meeting to remember information.

Chambers, E. (2003). Roots for Radicals: Organizing for Power, Action, and Justice. New York City, NY: Continuum.

Training and Keeping Volunteers

In order to keep volunteers that you recruit to your organization, you need to consider how a volunteer can get something out of their efforts – what do they get out of joining the group? It's important to figure out how a volunteer fits into the overall operations of the group so that he or she can apply their skills and experiences while feeling like they are contributing to the overall advancement of the campaign. To do this, volunteers will likely have to be trained on the group's campaign plan and goals.

To start thinking about how to retain volunteers or recruit new long-term volunteers, think about the reasons that you've stayed with the group and what you get out of it.

Recruit people for a specific tasks

- Ask volunteers what they like to do and what they feel comfortable doing.
- Always have a mental list of tasks people could do.
- Divide projects into many smaller tasks for different volunteers.
- Try to find something for everyone to do no matter how small the task.

Other considerations for keeping volunteers

- Check in with volunteers to see how they are doing with the assigned tasks.
- Offer consistent volunteer opportunities at different times of the day.
- Show appreciation (written or public thank yous).
- Avoid having people feel that their time is being wasted.
- Treat volunteers with respect. Be clear about what you are asking them to do.
- Provide ways for those interested to assume more responsibility.

Brown, M. (2006). Building Powerful Community Organizations: A personal Guide to Creating Groups that Can Solve Problems and Change the World. Arlington, MA: Long Haul Press.

3 Facilitating Discussion

Preparing for Meetings

Members of the Protect Our Children Coalition meet to discuss strategy. Photo from Michael Bagdes-Canning, used with permission.

Now that you've planned out your campaign on fracking issues, you need to keep meeting in order to make decisions about implementing the actions, build your group, or monitor your progress. There are many considerations that go into running productive meetings. The facilitator is responsible for providing opportunities for full participation while leading the group through the agenda, which is designed to advance your group's campaign. The following section covers some points for facilitators to consider when preparing for and running meetings.

The following points are things to consider when setting up your first series of meetings, or when organizing a larger meeting than you're used to. Once your group agrees on a regular meeting space, you'll only need to make sure that new members are aware of these logistics.

Meeting location

Try to find venues that are appropriate for the expected number of participants, type of technology you might need, and accessibility for your expected audience. Locations will vary significantly based on the number of participants in your group and group comfort level. For instance, a group may start off by meeting in a public space like a church basement, but might eventually meet at a group member's home. Pay attention to whether a location will allow your group to stay late enough to complete a meeting if your group is meeting in a public building or space.

Outreach for meetings

Think about how people in your community communicate, specifically the types of people you're trying to target to be in your group. You'll probably want to use a combination of phone calls, e-mail invitations, and social media. Try to get volunteers with your group to call potential participants to advertise the meeting well in advance – weeks before the meeting and again about three days prior to the meeting, as a reminder.

Meeting room format

Think about the purpose of the meeting when considering how you want to set up the tables and chairs in a room. Is there going to be a presentation? Do you hope that there will be a lively discussion? Chairs circled around a table or clusters of multiple tables often work well for group discussions because everyone can see each other clearly and the format promotes a more inclusive dialogue.

Brown, M. (2006). Building Powerful Community Organizations: A personal Guide to Creating Groups that Can Solve Problems and Change the World. Arlington, MA: Long Haul Press.

Choosing a Decision-Making Process

If your group is just starting, it is important to spend some time choosing a decision-making process together. This is one aspect of organizing that is often left until problems arise. By choosing a decision-making process early on, you can save yourself from later frustration. Different decision-making processes work for different groups. Choosing a decision-making process together, or by at least being clear about how your group operates, ensures that there is transparency and that group members are on the same page. Some examples of decision-making processes are: majority vote, super-majority vote, cumulative vote, and consensus.

Majority vote (51%):

The majority vote provides an opportunity for a group to see whether an idea is supported by more than half of the members. It is effective at making fast decisions, but can create divisions in the group due to going forward with an idea that may have substantial opposition.

Super-majority vote (66%+):

The idea of a super-majority vote is to ensure that a larger percentage of the group is in support of an idea before moving forward. It can be done by two-thirds, three-quarters, or any other percentage that your group decides. In general, it takes more time than a majority vote, but ensures a higher level of agreement among group participants.

Consensus (100%):

Consensus means that the whole group decides together, and requires addressing individual concerns that could cause some members to oppose the idea. It does not necessarily mean that everyone is completely in favor of an idea, but instead that no one will block an idea from moving forward. Consensus can take longer to come to a decision than a vote, but ensures that decisions are more fully supported.

Cumulative vote:

A cumulative vote is effective when there are many options of ways to proceed. Each person has multiple votes and can distribute them among the various options. This allows the group to gauge interest in many options, and eliminate ideas that have the least support.

One important decision the group must make is who is allowed to vote. Can only members vote, or anyone who comes to the meeting? If you have a coalition, does each group get a vote or each participant? Making it clear who has voting privileges will help ensure decisions are made through a fair and transparent process.

Getting stuff done at meetings

Since most of your meetings should be about making decisions, the subcommittee groups mentioned previously in the campaign planning section should bring their research and options for potential courses of action to the group meeting. The meeting facilitator is usually the organization's "chairperson" or top elected leader of the group. He or she is the person designated to run the meeting and should know they are facilitating ahead of time. Meetings should be efficiently run, encourage active group participation, and provide a sense of accomplishment.

Meetings should be focused on moving the group towards winning a campaign. Some meetings could also be focused on educating or training the group members in a related topic that helps advance the campaign or group mission. A group could even decide whether a particular meeting is necessary by figuring out if any specific goals could be advanced by having the meeting.

What is the facilitator's role?

The facilitator should understand the specific goals of the meeting and ensure that the meeting follows the agenda while encouraging broad participation. It's important for facilitators to focus on advancing the discussion about how the group can plan a campaign, make decisions about implementation, or evaluate the campaign. Ideally, the facilitator should not be presenting information or answering questions. The facilitator should be delegating roles and preparing an agenda that invites participation and perspectives from the entire group, and should be careful not to dominate the discussion themselves.

Other potential meeting roles

Depending on the format and size of your meeting, there may be other opportunities for group members to participate other than facilitating the meeting. The facilitator or core leadership group can recruit people to these specific roles or tasks:

- Note taker: takes meeting minutes, writes notes on easel pads.
- Timekeeper: reminds chairperson about time limits for each section of the agenda.
- Presenters: present ideas or alternative courses of action to the group based on outside research. Try to avoid having the facilitator present this information.
- Greeter: welcomes new people and asks for contact information to add to the group's list.

Preparing the agenda

The facilitator should consult with group leaders prior to the meeting to better understand the issues that will be discussed, and should ask leaders to take responsibility for appropriate agenda items. The facilitator may want to talk to some people on the core leadership team about any controversial issues before the meeting. The meeting facilitator should also try to catch up new people on the history of the group or current campaigns before the meeting.

It's particularly effective when the facilitator puts an easy decision towards the beginning of the meeting, so that participants feel quick success and to start off the momentum of the meeting in a positive way. More difficult or controversial decisions that will require some presentations and deliberation should be put towards the middle of the meeting. If possible, try to put an issue that you think most people will agree on towards the end of the meeting in order to end in a positive tone.

SAMPLE AGENDA

Citizens Strategy Meeting: Protect the Air We Breathe

- Welcome and Goals of Meeting.
    - Brief round table introductions.
    - Review goals for tonight (understand different types of campaign strategy and develop a strategy for our campaign).
- Campaign Overview
    - Review potential goals and demands:
      Goal: Work towards protecting the health of communities in Brown County and the surrounding region from harmful pollutants.
      Demands: lowest emitting technologies for compressor stations/flares.
    - Discuss and make decision on final goal and demands with whole group.
- Campaign Research Report-Back.
    - Info on target(s).
    - What/who does the target listen to?
- Discuss Strategy to Implement Campaign.
    - Lay out selected ideas – media/education, advocacy and base-building.
    - Discussion about selecting strategy or strategies people think we should pursue.
    - Review decisions made.
- Develop List of Ideas for Subcommittees.
    - Sign up to be on steering committee or subcommittee.
- Closing and Next Steps
    - One minute reaction from each person.

Brown, M. (2006). Building Powerful Community Organizations: A personal Guide to Creating Groups that Can Solve Problems and Change the World. Arlington, MA: Long Haul Press.
Bobo, K., Kendall, J., Max, S. (2010). Organizing for Social Change: Midwest Academy Manual for Activists. Santa Ana, CA: The Forum Press.

Starting the meeting

Try to start and end meetings on time, especially with smaller groups of people. In most meetings, the facilitator should welcome attendees and ask them to give brief introductions if there are people who don't know each other.

Review the agenda

At the beginning of each meeting, the facilitator should review the agenda to allow attendees to change or add to the agenda. Introduce each agenda item briefly, summarize the main goal of the meeting, and check to see if anyone has any clarification questions or comments. Ensure that everyone understands and agrees on the goal of the meeting. If you have a notetaker, ask them to write the agenda on a flip chart with time limits.

Throughout the meeting

During the meeting, a facilitator should try to ensure that there is general agreement on decisions made and that everyone is participating in the discussion and decision-making. Before moving on to the next topic, the facilitator should summarize the main discussion points and restate any decisions made. To encourage participation, the facilitator should try to encourage shy or quiet people to talk while preventing outspoken people from dominating the discussion. One technique is to ask to hear from someone who hasn't had a chance to speak yet.

Closing the meeting

At the end of the meeting, you should summarize what was accomplished in general and the specific decisions the group made, and review commitments that individuals made. Discuss what other follow up actions need to be taken to move the work forward. If time allows, do a 1-minute evaluation of the meeting by asking participants to share what they think worked well and things they would change for the next meeting. If you don't have a regular meeting time and place, decide on when and where your next meeting should be, but don't get caught up on making this a major decision for the night. If everyone uses the internet, using doodle.com to schedule meetings is very efficient.

Facilitation tips

- Keep to the agenda.
- Avoid detailed/unimportant decisions.
- Focus on action.
- Get commitments.
- Be flexible by adding time for items if needed.
- Close the meeting on or before the end time.

Meeting follow-up tips

- Work with the note-taker to prepare notes quickly.
- Use follow up phone calls to:
  - Update active members who missed the meeting.
  - Update potential members who missed the meeting.
  - Follow up with new people (set up one-on-ones).
- Thank people who helped with the meeting.
- Review the outcome with the chairperson.
- Leaders ensure that tasks are completed by the next meeting.
  - Prepare any necessary report-backs for group.

4

Media Tools for Advancing Your Campaign

Using Print & Social Media to Your Benefit

Why Media?

Once you've determined your campaign goals and strategy, you may find that using the media is a major part of your strategy. There are several important ways to use the media to advocate for your stance, but your group should consider how your use of different media tools will ultimately impact your target. While newspapers, radio, television, and the internet are free advertising for your issue, these venues are also important opportunities to advance your campaign goals. Which newspapers does the target read or what voices are they most interested in hearing opinions from? Take advantage of media opportunities by carefully thinking about how a published media piece fits into your overall campaign plan.

Media as advocacy

- Call on decision-makers to satisfy your campaign demands.
- Thank or spank (criticize) elected officials.
- Some elected officials pay particular attention to negative press.
- Keep track of like-minded letters to the editor (LTEs) to pressure elected officials at meetings.

Other reasons for using the media

- Makes your cause more public.
- Gives your group credibility as a champion.
- Makes you an authority on the issue and can lead to calls from reporters.
- Opens up future networking opportunities.

Know your media market and reporter

- Keep up on local papers and larger news outlets that cover your geographic region and issue.
- Identify which reporters cover your issues in your area and get their e-mail from articles they write or contact an environmental organization (such as Clean Air Council) for contacts.
- Contact reporters with information on the issues they cover.
- A relationship may provide access to the paper's editorial board.
- Be a trusted source of information by acting as a resource on your issue.

Using Media

Media tools

- Editorials
- Editorial board meetings
- Opinion columns
- Letters to the editor
- Press events
- Media advisories
- Multimedia
- Social media

Editorials

- Newspaper editors write an opinion on an issue:
  - Shows critical thinking,
  - Reflects readership's opinion, or
  - Attempts to persuade
- Request an editorial board meeting to influence what the editor writes.

Editorial board meeting (Ed. Board meeting)

- Use your request for a meeting to demonstrate your knowledge of the issue.
  - Demonstrate your experience and successes.
- Bring local stakeholders or experts on the issue.
- Sometimes editorial boards will ask you to write an opinion piece instead of having a meeting.

Opinion columns (Op-ed)

- Keep your eye on the news related to your issue.
- Take a timely and informed stance on a specific issue.
- Use credible sources.
- Ask the reporter covering your issue to put you in contact with the paper's editor.
- It is very important to respond quickly to news and current events.

Letters to the editor (LTEs)

- An LTE is a short response to an opinion piece or story a paper published.
- Cite the headline and date of the article you're addressing.
- Follow the paper's submission guidelines.
- Talk about how the issue directly affects you.
- Pay attention to anniversaries, coincidences, timelines, and eye-catching rare occurrences and use them to highlight aspects of your campaign.

Op-Eds	LTEs
Must be supported with facts and figures	Should require no research
Usually around 700 words	Should be short; around 200 words
Must be focused, but can touch on broader issues	Should stick to a narrow topic
Responds to issue that is hot in the news	Responds to an editorial, opinion column, article, other LTE, or something newsworthy

Press events

- Events you organize to earn media attention for your issue and campaign.
- Includes press conferences, rallies, and demonstrations.

Preparing for an event

- Prepare participants with talking points.
  - *A unified message about your group and campaign is very important.*
  - *Designate and prepare media spokespeople ahead of time.*
- Pick a location that will provide interesting visuals.
- Prepare press statements ahead of time to give to members of the media.
  - *Record a quick sound bite for TV and radio.*
- Prepare and issue media advisories (more details below).
- Prepare and issue press releases (more details below).

Media advisories

- A media advisory should include the who, what, when, where, and why of your event.
- It should also describe the visuals of your event to entice reporters and photographers to cover it.
- E-mail media advisories closer to an event (about 3 days before).

Press releases

- Allows a reporter to have a written article without attending an event.
- A press release can also be a reaction to an important announcement.
- Press releases are usually sent out immediately after the event occurs.
- Describe your event, its causes, and its intended effects.
- Quote influential sources.
- E-mail your press release directly to reporters with local papers who cover environmental issues.
- Always include "For Immediate Release: DATE" in the subject line of your email.
- Consider using a letterhead.
- Include footnotes with resources.

Multimedia (audio, video, photography)

- Most media outlets prize visuals or audio over print content.
- Being in a video or a recording gives you a more personal connection with your audience.
- Multimedia is more quickly digested and is easier to send around.
- Multimedia is very effective for increasing the amount of people you reach through social media.

Social media

- Social media is the space in which multimedia is circulated to the wider public.
- Facebook, Twitter, and Google Plus are free, quick, user-run news feeds. YouTube and Tumblr are also useful tools for sharing your campaign.
- Many people spend a majority of their time online scanning through images and video.
- Knowing regional "blogs" on your issues is just as important as mainstream news sources.
- Bloggers will be more receptive to user-generated content.
- Use images with succinct messages to more effectively promote your campaign.

A Appendix

Campaign Planning Worksheets

Campaign Planning Worksheets

This section contains all the worksheets referenced in earlier sections of the Community Organizing Guide. You will also find additional campaign planning worksheets and exercises that may prove useful. The headers have been removed to make them easier to photocopy and use in your organizing activities.

In this appendix, you will find:

- Action activity chart: *You can use this chart to help choose what will be the best actions for your campaign. Rank which actions you think are appropriate, what will be effective, and any known successes.*
- Strategy checklist: *Fill in the blank areas as a guide to help you develop a portrait of your target. Complete the second column (Step One), then add the information to the third column (Step Two) as you acquire it.*
- What moves the target worksheet: *This chart provides a blank worksheet you can use to fill in information you learn about what moved your target in previous campaigns.*
- Ranking actions: *Ranking can be used as a decision-making tool to analyze and graphically illustrate a large amount of information and group preferences about a campaign. The tool can also be used to understand how people in the community make decisions. Participants determine the campaign strategy or action ideas to compare and develop different criteria to assign scores to each option. A holistic comparison can be made between the various options by ranking them with different criteria. The activity takes about one and a half hours.*

Minieri, J., & Gestos, P. (2007). Tools for Radical Democracy: How to Organize for Power in Your Community. San Francisco: Jossey-Bass.

Action Activity Chart

You can use this chart to help choose what will be the best actions for your campaign. Rank which actions you think are appropriate, what will be effective, and any known successes.

Action	Activity	Is the activity appropriate?	The target's response?	Was is it successful?
Sit-in	Wait in an office and stay until you get what you want.			
March	People walk together past a location significant to your campaign target.			
Press conference	Hold a meeting for the press about an issue, report, or action.			
Blockade	Occupy a space to change the function or stop activity.			
Boycott	Ask people to stop patronizing a service or buying a product.			
Strike	Walk out of a job, school, or other place in protest.			
Rally	Gather people in a public space with speakers talking about an issue.			
Demonstration	Show opposition through action at a strategic location.			
Picket line	Disrupt an entrance to a building to discourage people from entering.			
Street theater	Publicly perform create a skit, song, or reading about an issue.			
Flyering	Hand out leaflets to educate the public about an issue.			
Town hall meeting	Public meeting about an issue in the community.			
Accountability session	Public meeting where target is asked to give clear answers.			
Building or office takeover	Take over an office to stop it from functioning.			
Call-in day	Many people call a target on one day to compel him/her to act.			
Disrupting public meetings	Disrupt public meetings to prevent them from functioning.			
Banner drop	Drop a banner with a message in view of the target and media.			
Civil disobedience	Knowingly break the law to raise awareness of the issue.			

Strategy Checklist

Fill in the blanks below as a guide to help you develop a portrait of your target. Complete the second column (Step One), then add the information to the third column (Step Two) as you acquire it.

Target's Name:

Target's Title:

	Step One: Where and how will we find the answer?	**Step Two: What do we know?**
Power		
Where does the target derive power?		
How much power does he or she have?		
Issue		
What is the target's position?		
How big a priority is this issue to the target?		
Is his/her position open to change and what would make that happen?		
Who has the target's ear?		
Who are the people the target listens to?		
Motivation or Self-Interest		
What is the target's self-interest?		
What is the target's motivation?		

Minieri, J., & Getsos, P. (2007). Tools for Radical Democracy: How to Organize for Power in Your Community. San Francisco: Jossey-Bass.

What Moves the Target Worksheet

The following chart provides a blank worksheet you can use to fill in information you learn about what moved your target in previous campaigns.

Target's Name:

	Issue	Strategies used	What worked?	What did the target finally negotiate?	How long did the campaign run before winning?	Why did the target move?
Campaign 1						
Campaign 2						
Campaign 3						
Campaign 4						
Campaign 5						

Ranking actions

Ranking can be used as a decision-making tool to analyze and graphically illustrate a large amount of information and group preferences about a campaign. The tool can also be used to understand how people in the community make decisions. Participants determine the campaign strategy or action ideas to compare and develop different criteria to assign scores to each option. A holistic comparison can be made between the various options by ranking them with different criteria. The activity takes about one and a half hours.

Matrix Scoring

Matrix scoring to evaluate choices

Time: 1.5 to 2 hours

1. Use the recommended strategy options presented by the group and write these down in a list.
2. Determine the criteria to score the options. One way to do this is to compare two of the options listed to decide which is better. Ask participants to give a score from 1 to 5 for each one, and then have them explain why they made that decision. Write down all of these reasons to form the criteria (write these across in a row). Ensure that the criteria are all positive attributes of the options (for example: low cost, easy to implement, etc.).
3. Draw the matrix with the options listed vertically and the criteria listed from left to right across the top. Start at the top left of the matrix and read aloud the first criteria, going down through each alternative and scoring them from 1 to 5 (1 representing the worst score and 5 representing the best). When the first criteria (column) is complete, move to the right to complete the next criteria for all options.
4. The points can be added across each alternative to show a final score in the right column. If participants want, they can also assign different weights to each criteria to show that some should have a greater impact on their decision-making than others. To assign weights, participants can increase the numerical range to 10 for the criteria they think are most important.
5. Ask participants to explain what the matrix reveals about the various options. The facilitator can ask additional questions to clarify why a certain decision was made.

Below is an example of a matrix scoring chart used to determine what recommended actions a group feels will be most appropriate for achieving the goals of their campaign.

Action	Reaches Target	Reaches Public	Attracts Media	How much will it cost?	How many people?	Total Score
Press conference	3	5	5	1	3	**17**
Demonstration	2	3	4	5	2	**16**
Flyering	1	4	1	3	4	**13**
Legislative briefing	5	1	3	2	5	**16**

Kumar, S. (2002). Methods for Community Participation: A Complete Guide for Practitioners. London: ITDG Publishing