

INTRODUCTION

Community Catalyst’s mission is to organize and sustain a powerful consumer voice to ensure that all individuals and communities can influence the local, state and national decisions that affect their health. Community Catalyst works to build the capacity, influence and power of state and local organizations to bring a consumer voice to health policy change. Whether the aim is to pass or prevent passage of legislation on a particular health care issue, defend against cuts to critical public programs, or educate a particular constituency about the impact of a law or regulation, organizations seeking to advance a consumer health agenda must have six advocacy capacities to succeed. These [six advocacy capacities](#) build the foundation for a greater system of advocacy, moving ideas from opportunities to policy change with supporting capacities of leadership and evaluation.



Grassroots organizing is one of the essential capacities needed to carry out a successful campaign. Tapping into the power of grassroots organizing brings important voices to your movement, providing the consumer perspective, giving feedback on the current landscape and raising new issues of concern to consumers. In addition, grassroots organizing builds the power you need to win. Without the power of a significant number of informed and organized consumers, even the best pro-consumer policy agenda will often fail. The purpose of this tool is to provide you with information about building your capacity to engage in grassroots organizing at the local and state levels. The tool is targeted primarily at state-based consumer advocacy 501(c)(3) organizations, though much of the information is relevant to (c)(4) organizations as well. The tool includes information about both building your own internal grassroots organizing capacity and building that capacity by developing strong partnership with other organizations. No matter which path your organization chooses, we hope recommendations in this guide will help you to build a strong grassroots base, thereby enhancing your ability to win policy change campaigns.



Photo Credit: Children’s Defense Fund - Texas



Photo Credit: Children's Defense Fund - Texas

WHAT IS GRASSROOTS ORGANIZING?

To understand grassroots organizing, it is crucial to define and distinguish it from other advocacy capacities. To create a common language for this tool, we offer the following definition:

A process of building power by involving a constituency in identifying both the problems they share and the solutions to those problems, identifying the targets that could make those solutions possible, engaging with those targets through negotiation, confrontation and pressure, and developing the capacity to take on further problems.

THE POWER OF GRASSROOTS ORGANIZING

Grassroots organizing is powerful because it allows you to bring large numbers of people to the table. These numbers impact decision-makers, and the bigger your numbers the greater your impact.



MONTANA

In Montana, advocates organized thousands of grassroots constituents in support of closing the Medicaid coverage gap, resulting in a huge win in April 2015. [Montana Women Vote](#) (MWW) is a coalition of non-profit women's organizations working statewide to educate and mobilize low-income women and their allies to participate in the democratic process. The main reason they were successful, according to Sarah Howell, MWW Executive Director, was because they did about three years of steady grassroots organizing. They did public education and advocacy training and built strong relationships with constituents. During the biggest push of the campaign, they turned out more than 500 people to five lobby days and a rally, generated 11,000 phone calls to legislators and placed 8-10 earned media pieces per week. This was critical to their securing health care coverage for 70,000 Montanans.

However, numbers are only part of the story. Grassroots organizing is also powerful because it allows consumers to speak directly about their experiences and the effect of policies and programs. A strong grassroots base allows organizations to collect stories from consumers, and these stories become powerful weapons in any policy campaign.

In addition, strong grassroots organizing provides coalitions with an opportunity to employ a simultaneous inside/outside strategy. Grassroots groups are often free to engage in confrontational direct action activities (the outside strategy), like sit-ins in front of the governor's office or blocking the entrance of a building. When coordinated with more traditional tactics like lobbying (the inside strategy), this combination of tactics can have a powerful effect on decision-makers.



Photo Credit: Montana Women Vote



The Difference Between Grassroots Organizing and...



COALITION BUILDING

A coalition is an alliance or partnership between different organizations that represent a broad range of interests and brings different assets, mission, perspective, constituencies, relationships and strategies to work collaboratively toward a common goal.

Coalition building is a critically important advocacy capacity, but it is not the same thing as grassroots organizing. Organizations can bolster their competence and capacity by forming deliberate partnerships with other organizations that complement their strengths. Most organizations, including Community Catalyst, do this by forming a coalition. However, organizing organizations is not the same as organizing individuals.



GRASSTOPS ORGANIZING

Some members of your coalition, such as organizational leaders or community members in positions of power, may be considered grasstops.

Members of the grasstops will already be seen as community leaders and will be able to influence decision-makers through established connections.

It is important to include these people in your work, but organizing at the grasstops is not the same as organizing at the grassroots.



ASTROTURF

We refer to manufactured attempts to mimic genuine long-term organizing efforts as astroturf, or a synthetic “grassroots” movement driven with large cash infusions, often from corporations, public relations firms or other deep-pocketed sources.

Organizations and groups that use an astroturf strategy are generally using short-term tactics that are designed to influence a policy or campaign at a specific moment in time. Unlike true grassroots movements astroturf campaigns do not represent authentic engagement of activists organizing on their own behalf, and this tactic does not build a base of support that can be engaged over time. Any organization with money can use astroturf tactics, and those tactics can be effective. However, an astroturf campaign will almost always collapse in the face of a true grassroots base. In other words, building a grassroots base is your best inoculation against an astroturf campaigns waged by your opposition.

MORE ABOUT ASTROTURF



TENNESSEE

In 2014, the state of Tennessee was considering a bill that would have closed the Medicaid coverage gap and extended coverage to over 200,000 people. Sensing an opportunity, a coalition that included consumer advocates but was dominated by health plans, hospitals and business groups formed to support the Medicaid expansion. The coalition raised money and hired a lobbyist, but was resistant to the suggestions by consumer advocacy groups to build grassroots support for expansion. Americans for Prosperity and the Koch brothers stepped into this vacuum and began pouring money into the state, airing radio ads, sending direct mail and hosting a town hall to generate opposition to expansion. This astroturf spending was effective. Efforts to expand Medicaid in Tennessee failed in 2015 when the bill failed to get out of committee.

Learning from this devastating loss, consumer advocates in Tennessee carved out their own space for campaign planning and execution. They built upon their strong base of supporters, mobilized consumers from across the state, coordinated call-in days and staged rallies. Advocates launched a grassroots movement that legislators could not ignore. In the spring of 2016, the Speaker of the Tennessee House of Representatives announced that she would form a Task Force to create a plan that would address the Medicaid coverage gap. The Task Force suspended its work because of the results of the 2016 election, but advocates did not let that stop their momentum. During the 2017 fight to repeal the Affordable Care Act, the advantages of focusing on building a grassroots base became clear. The advocates generated over 3,000 calls and 500 letters to their senators offices, encouraging them to resist repealing the law. This pressure was effective. Both Senator Lamar Alexander and Senator Bob Corker eventually stated publically that they opposed repealing the ACA without a replacement plan in place. With this kind of grassroots base in place, Tennessee advocates will not be nearly as vulnerable to a Koch-led astroturf campaign in the future.

RESOURCE BUILDING FOR GRASSROOTS ORGANIZING

Whether you are hiring your own organizers or partnering with an existing organization, grassroots organizing requires an investment over time. The good news is that even just one skilled organizer can produce impressive results in a short time period. Furthermore, once you've built your base you have both a source of power and a potential new source of funding: members or engaged supporters may also donate to your organization.

In preparing this section of the toolkit, we reached out to funders who have supported organizing and advocates who have successfully raised money for organizing to get their perspectives on how to build resources for this work. A number of key themes emerged from these conversations.

- ***Develop a Strong Plan***

It is much easier for funders to consider investing in grassroots mobilization work when you approach them with concrete, strategic plans. Grassroots organizing efforts should be seamlessly woven into your [campaign plans](#) and ongoing advocacy efforts.

- ***Remember - You're In It for the Long Haul***

Regardless of how comfortable funders are with grassroots organizing and advocacy, maintaining ongoing relationships with funders and keeping them aware of what you are doing can build comfort and good will toward advocacy and organizing, and help secure the longer term support you will need to build and maintain a grassroots base. Foundations and philanthropic organizations regularly shift their focus and strategy. Just because a foundation doesn't support grassroots organizing now doesn't mean they never will. Building and maintaining the relationship now can yield dividends later.

- ***Conduct a Funder Briefing***

One way to build relationships is to hold a [funder briefing](#). Bring funders together and describe your portfolio of work. This is an efficient way to put yourself on a funder's radar. During the briefing, be sure to provide tangible outcomes that illustrate your success. For example, describe how many phone calls you generated during your last campaign and then explain how these phone calls shifted votes in favor of your cause. If you can, invite a funder to the briefing who is already funding grassroots organizing so they can talk to their peers about why they do this.

One health-related, state-based funder that we spoke with shared their journey to supporting grassroots organizing and advocacy. This particular foundation used to fund primarily direct services. However, after going through a strategic planning process they realized that they weren't making the impact they wanted and decided to try to address more non-traditional factors that influence health - like income, education, housing, and public safety. They then quickly realized that they needed to fund advocacy and organizing. Now this foundation is much more focused on grassroots organizing and has been driving the conversation in their state on pushing for systematic change.



WISCONSIN

In early 2015, Citizen Action of Wisconsin (CA WI) tested a resource development strategy that combined a membership organizing model with fundraising. Specifically, CA WI began a drive to organize small monthly contributors to fund a permanent community organizer. The drive sought to identify 250 members who would commit to monthly dues of \$20 - \$30. These 250 members would have to sign up during a 60-day campaign or the project would be cancelled and all contributions refunded. CA WI developed a dedicated crowdfunding webpage with a video, a live 60-day countdown, a progress bar showing an up-to-date member count and an option to either pledge or to request more information. Contributions could be set up as a monthly credit card charge or a large one-time contribution.

Several key elements contributed to the campaign's success:

- ✓ The recruitment goal of 250 members created a sense of being part of a greater community.
- ✓ The 60-day countdown created a sense of urgency and accountability.
- ✓ The goal of the campaign – hiring a fully funded local organizer – was both realistic and tangible.
- ✓ The ability to freely exit reassured members that if CA WI did not listen to them they could leave at any time. This substantially eased fears of monthly contributions.
- ✓ CA WI refers to these contributors “member-owners” and offers them opportunities to engage in a variety of leadership roles.

Citizen Action recruited well over 200 dues-paying members in the 60-day campaign period, averaging roughly \$23/month/person. The model has since been replicated in Milwaukee, Eau Claire, Suburban Milwaukee and now Northeast Wisconsin (Greater Green Bay). Additionally, CA WI is finalizing another recruitment drive in the Latino community in Southeast Wisconsin and launching a new drive in the North Central Wisconsin (Greater Wausau) region of the state.

• *Choose Your Language Carefully*

Foundation funders are in different places with their comfort level in funding grassroots organizing. Some foundation funders who may not be comfortable with “grassroots organizing” may be willing to invest in “public education,” “civic engagement,” or “patient or community engagement and activation.” Consider framing your work using this type of alternative language.

BUILDING CAPACITY

There are two ways to enhance your grassroots organizing capacity. One strategy is to build your internal grassroots organizing capacity. The other strategy is to partner with an organization that specializes in grassroots organizing. Neither approach is superior to the other. Rather, both approaches have advantages and disadvantages, and you should pursue an approach that makes sense for your organization, the issue around which you're organizing, and the existing capacity in your state or region.



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BUILDING YOUR INTERNAL GRASSROOTS ORGANIZING CAPACITY

Hiring an Organizer

[Hiring skilled organizers](#) can be challenging, in part because you are not looking for the kinds of skills or experience you might normally be seeking. For example, college degrees or even high school degrees are not the most important qualifications. Start by looking first at people who are members of the base you're trying to organize. Is your base Spanish-speaking residents living in a public housing development? Think about looking there to find your organizer. Is your base individuals who have been incarcerated? Look among that population for your organizer. Do you have activists who have moved up the pyramid of engagement and are now at the leadership level? These people might be exactly who you want to hire for organizing positions.

The challenge of hiring is made even more difficult by structural differences in how organizers are paid. It is not unusual to find that organizers are paid less than policy analysts or lobbyists, despite the fact that organizers are often more difficult to hire. Because organizers are sometimes from ethnic or linguistic minority communities these differences in pay, however unintentionally, perpetuate racial pay disparities,



OHIO

[UHCAN Ohio](#) built its internal grassroots organizing capacity and targeted MyCare Ohio, the state's program for individuals dually eligible for Medicare and Medicaid. The organizer began by approaching local housing authorities and seeking permission to speak at their monthly events for seniors, many of whom were dually eligible.

Following each presentation, the organizer asked participants to sign up if they'd like to be more involved in opportunities to shape MyCare Ohio's implementation. He spoke to 2-3 groups each day for over a year at housing authorities, independent living facilities and assisted living centers. By the time MyCare Ohio launched - with a host of problems - UHCAN's organizer had already built a robust database of consumers. When they began experiencing problems with MyCare, those consumers would reach out to UHCAN's organizer. Once the organizer helped them resolve their issues, those same consumers then told their friends and neighbors about how helpful he had been. Soon, UHCAN's organizer was fielding calls from all over the state. He added each of these people to his growing database. In a little over a year, he had built a base of hundreds of dual eligible enrollees and stakeholders from across the state.

so it is important to try to achieve pay equity with your other program staff. Grassroots organizing is most effective when it builds over time, so if you can, try to get away from hiring organizers as contractors, or for temporary or only part time positions. Hiring permanent, full time organizers with equitable salaries and benefits institutionalizes and raises the importance of organizing within your organization.

Hiring an Organizer: What to Look For

You are looking for someone to whom your base can easily relate. You are looking for someone who speaks the language - both literally and figuratively - of at least some portion of your targeted base. This is why it is often effective to hire your organizer from the base you've targeted. Beyond that, you are looking for specific skills. You might find those skills on a resume. For example, if you're looking at a candidate with previous paid or volunteer organizing experience, you can ask specific questions about how they go about organizing to determine their skill level. However, you should also consider candidates from your base who don't have formal organizing experience but who are natural organizers. In either case, here's what we suggest you look for:

- **Commitment and Passion** – The best organizers believe in what they are doing and are committed to your issue at the values level. However, don't confuse commitment with content knowledge. A good organizer does not need to be an expert on Medicaid or have fifteen years of experience in the health care field. The kind of content knowledge an organizer needs can be taught very quickly. Commitment and passion, however, come from the heart.
- **Empathy** – Does the candidate exude warmth and caring? Do they look people in the eye? When they're listening to you do you feel like they're really listening? Do they incorporate what you said into their response?
- **Outgoing/Extroverted** – Good organizers have to be comfortable talking to strangers in person and on the phone. They need to be able to connect and build trust quickly with someone they just met.
- **Charismatic Humility or Humble Charisma** – This is a paradox, and it's difficult to find. Good organizers have some type of charisma. They draw people to them. They make strangers feel comfortable talking to them. At the same time, they don't need to be in the spotlight. The best organizers are nowhere to be found when the picture is taken, or when it's time to shake the governor's hand. They've put the grassroots members first.
- **Party Planner** – Look for the person who organizes the birthday parties for everyone else. Figure out who talks others into attending a party. Good organizers never arrive alone - they always bring others with them.
- **Persistence** – Good organizers hear “no” all of the time, but they do not get discouraged - they keep going until they hear “yes.” Not only does this apply to the issue they are working on, but it also refers to their persistence in engaging potential grassroots supporters on an issue. Once they've identified an activist, they gently and patiently keep pushing people up the [pyramid of engagement](#).
- **Comfort with Technology** – Good organizers understand the value of an up-to-date database and of using technology to enhance the value of your base.

You can see that while some of these skills can be taught, many cannot. It is important when hiring an organizer to stay open to unlikely possibilities. Prioritize the personality qualities highlighted above. Database skills, for example, can be easily taught; charisma and humility cannot.

When hiring, give the candidate an opportunity to engage in the organizing tactics you use most frequently. Take them door knocking, have them participate in a phone bank, or have them table at an event as part of the interview process. Consider paying a stipend for this, as it is likely to take a half or whole day. You'll know very quickly if you've got a potential organizer on your hands once you see them interacting with people. Some organizations use their volunteer program as a kind of informal training program for organizers and then hire from that program. You might begin with volunteers who have moved up the [pyramid of engagement](#) and have some of the qualities listed above. More formally, you can develop an internship program in which, for a relatively small investment, you can hire someone and see how they do in an organizing campaign. Such internships should be paid and short-term. Try to resist the temptation to use a program like this as a long-term strategy for holding down costs.

Working With an Organizer

One way to set your organizer up for success is to write a job description that focuses the organizer's efforts geographically. Hiring someone to organize statewide may not be as successful as hiring someone to focus on a specific region or city, or even neighborhood. Another way to support your organizers, and also to measure their job performance, is to work with them to develop very specific goals. For example, telling an organizer to bring "a bunch of people" to a legislative hearing is not helpful. However, asking an organizer to turn out 10 people to a hearing, one of whom is prepared to testify, is much more effective. Your turnout goals should be realistic in light of the size of your base. Remember, effective organizers are rarely in the office – they are out in the field talking to people, building and nurturing their base. This can present a dynamic that is different from what you are used to. Set up periodic check in/systems that work for both of you.



PARTNERING WITH EXISTING GRASSROOTS GROUPS

How to Find Partners

Grassroots groups, like all advocacy organizations, come in many shapes and sizes. Some are local organizations that run on a shoestring budget, others are part of multi-issue statewide organizations, and others are affiliates of larger national networks. Their structures can be formal, such as a 501(c)(3) with paid staff and a board of directors, or they can be an informal group of



NEW YORK

In 2012, the [Community Service Society of New York](#) (CSS) worked with [Make the Road New York](#) (MRNY) as two of the lead partners in a very large coalition seeking to pass a paid sick leave ordinance through the New York City Council. CSS is New York State's premier anti-poverty policy and advocacy organization. MRNY is a multi-issue grassroots organizing organization with a focus on Latino and working-class communities. CSS conducted the research and policy analysis for the campaign, and both organizations, along with other partners, participated in generating media coverage, developing strategy, lobbying and organizing. MRNY brought a particular expertise to organizing Latino workers and small business owners in support of the ordinance, and on identifying individuals who could tell compelling personal stories. The initial ordinance passed the City Council in June 2013 and an expanded version, made possible by the 2013 Mayoral election, passed in March of the following year. CSS and MRNY continued their partnership, now to support implementation of the new law. They developed educational materials for workers in English and Spanish, and MRNY distributed them at subway stations, in public parks, on sidewalks and at local colleges, educating workers about their new rights. This effective partnership made paid sick leave a reality for over 1.2 million New Yorkers.



Photo Courtesy of CSS

volunteers that gathers around an issue, event or activity. Grassroots groups can range from a base of a few dozen people to thousands. Membership may be explicitly defined through dues and formal endorsements, or the group may simply have a tacit understanding of belonging that brings them together. Grassroots groups may have regular, ongoing meetings or they may only come together when needed.

In looking for a grassroots organization with which to partner, it might make sense to look first for a local affiliate of one of these national organizations:

[The PICO National Network](#) - Working primarily through faith organizations, PICO has 50 affiliated federations in 17 states.

[People's Action](#) - A national citizen's action organization with affiliates in 22 states.

[The Center for Popular Democracy](#) - Works with 43 partner organizations in 30 states to move progressive policy change.

[Gamaliel](#) - Works primarily with faith organizations in 17 states to build political power and effect change.

[Public Interest Research Group](#) - US PIRG has affiliates in 47 states that focus on consumer advocacy.

[Indivisible Movement](#) - This network emerged immediately after the 2016 election to resist the agenda of President Donald Trump. You can find a local contact through their website. Your state may also have non-affiliated grassroots organizations that operate statewide. Larger organizations with paid professional staff often have organizers in place that can help prepare their members for events and actions. Their members may also be more familiar with the advocacy process. However, these organizations often have many competing issues. You are likely not the only group approaching them to support your issue.

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You might also explore local non-advocacy groups. You may know them through a personal or social connection. They may or may not have a structure in place for advocacy. A [mapping exercise](#) for identifying coalition partners can also be helpful in identifying these groups. Here are some places to start:

- Faith-based groups and places of worship
- Community centers, YMCAs, Boys and Girls clubs, senior groups
- Parent groups
- Informal community leaders
- Online community forums

You may be familiar with a group like this but not thought of them as supportive of your issue. Find out who runs the group and explore whether or not there is a common interest on which you can build a relationship. These kinds of groups might become involved in your campaign because they have members who can personally identify with your issue. Such individuals bring experience to the table, understanding and a passion for change that is very valuable. However, they may not have experience in advocacy and it might require more of your staff time to mobilize them. Because grassroots groups often run on a shoestring budget, providing funding through contracts and or sub-grants is a best practice.

Working with Grassroots Organizations

As you develop strategies to engage grassroots partners, keep in mind the following principles:

- **A seat at the table is not enough**

There are a number of ways to partner with grassroots organizations, but paramount is to respect and value their membership and foster their leadership. You might feel like an invitation to a coalition table is sufficient, and it may have been sufficient for your other partners. However, you may have to do more to really engage grassroots groups. Start by asking if you can attend one of their meetings, instead of just inviting them to yours. Once you attend, spend some time just listening. Take time to understand how the organization works. You may find significant differences in the decision-making process, the type of language used and in the organizational culture. Try to understand some of these differences. Then it might be appropriate to ask to meet with them (on their turf) and talk about how you might work together.

- **Include your grassroots partner in strategic planning**

Many statewide advocacy coalitions include and invite grassroots partners to their leadership team tables but do not actively include them in planning, resource sharing and campaign activities until they need a consumer story for a media event or legislative visit. To build a true partnership,



Photo Credit: Access Community Health & Research Center

you should ask grassroots organizers to actively participate in planning activities and strategy sessions. When they can, state level consumer health advocates should provide financial resources in support of grassroots members' participation. Sub-grants can boost a grassroots organization's capacity to participate in your campaign.

- **Be clear about decision-making**

Policy change almost inevitably involves compromise, and who is in the room to negotiate that compromise is critically important. Be clear and up front with your partners, including your grassroots partners, about what the process will be for decision-making and who will be in the room to make decisions about policy compromises when the moment comes. Grassroots organizations can accept compromise as well as anyone else, but only if they play a part in the decision-making and/or fully trust the individuals negotiating the compromise.

- **Be clear about what each party can realistically bring to the relationship**

Organizing people, building lists and maintaining a strong base is not easy and grassroots groups must keep their members engaged without overburdening them with too many causes. Even if they sign-on to support your campaign, they may not agree to turn out members. It is important to have a conversation about what level of support would be most helpful, and a clear agreement about roles, responsibilities and sharing credit.



Photo Credit: Health Access California

Think about your relationship with your grassroots partner as a two-way street in which you are each both giving something and getting something. Some things your grassroots partner may be able to help you with include:

- ✓ Developing and distributing legislative action alerts
- ✓ Phone banking and canvassing
- ✓ Identifying grassroots constituents for meetings with lawmakers/decision makers
- ✓ Candidate forums in which constituents engage directly with candidates*
- ✓ Consumer stories for media campaigns
- ✓ Voter registration drives and get-out-the-vote efforts*

Some ways you may be able to help your grassroots partner include:

- ✓ Volunteering or organizing a group of volunteers
- ✓ Providing policy analysis
- ✓ Providing strategic communications support
- ✓ Connecting grassroots partners to elected officials or other decision makers
- ✓ Providing in-kind or financial support

- **Give credit openly and widely in a way that reinforces grassroots' success and their own sustainability**

Claiming credit for policy advocacy wins is a necessary part of advocacy work. It builds credibility and opens up new possibilities for funding streams. The work it takes to turn out people directly impacted by an issue is time and resource intensive. Highlight the role grassroots organizations played in your victory so your partners can further build their power, enhance their fundraising opportunities, and pave a path for future collaborations.



Photo Credit: Flickr user Joe Brusky via Creative Commons

* The tax status of your organization determines whether or not you can be involved in political activities. In addition, individual funders pose different limitations on advocacy and political work. Be sure to check with your funders so you are in compliance.



Photo Credit: Flickr user mathiaswasik via Creative Commons

METHODS FOR BUILDING YOUR BASE

Now that you've either hired your own organizers or established an effective partnership with another organization, it's time to focus on the work of base building. Grassroots organizing is best done on the individual level, through relationship-building conversations with community members that highlight the importance of the issue and its relevance to their lives. Once you've identified a potentially interested individual, keeping them engaged will require repeated contacts over a period of time. Each contact should be accompanied by an advocacy "ask" of some kind, whether that is writing a postcard to a legislator, attending a rally, or contributing their story to a storybank. In this section of the toolkit, we will talk about how to identify and keep track of your base, and how to move the individuals you work with up a ladder of engagement to build authentic grassroots leadership.

Identify a Base

It is almost always necessary to focus your organizing on a specific base. A base is a very precise slice of the general public that has the greatest proclivity for supporting your issue or campaign. There are a number of ways to go about identifying your base:

- **Geographic**

You may want to consider mobilizing a base that lives in a particular geographic area, like a housing development, near a specific school or hospital, a specific neighborhood, or a particular legislative district.

- **Demographic**

Perhaps your base is a certain demographic type. For example, seniors, or college students. You can be as specific as your data resources allow you to be.

- **Organizational**

Your base may belong to a type of organization. For example, a labor union's base consists of their dues-paying members. For a faith organization, the base would be members of a particular synagogue or congregation. Keep in mind that organizations do not readily [share their membership lists](#) with others, so if this is your approach you'll need to develop a close and mutually beneficial agreement with the partner organization. These kinds of relationships usually develop over time.

Many groups will identify a base that crosses more than one of these categories. For example, seniors who live in a public housing development (demographic + geographic), or college students who attend a particular university and participate in organized athletics (demographic + geographic + organizational). Your base should clearly link to the strategies and goals of your campaign or issue. Think carefully about who your natural base might be and be realistic about your ability to engage them.

You Are Going to Need Data

Once you identify your base, you will need to figure out how to have conversations with those individuals. That means you need to know where they live, where they work, what their phone numbers and/or email addresses are, and/or where they gather in significant numbers so you can speak with them. In addition, once you start talking to people and identifying who is interested in your issue, you are going to need a good database in which to store their information. Dollars invested in a good data set and/or in a good database program are dollars that pay dividends down the line. We recommend looking at something like the [Voter Activation Network](#) (VAN) or [Salsa](#). Any database program you select should:

- Capture people's basic contact information
- Provide a way for entering details about every contact with each individual
- Have a section for special notes
- Include voter registration information and voting history³
- Allow you to develop mailing, door-knocking, and phone-banking lists using various kinds of cross-cutting characteristics (such as developing a list of all women age 25-65 who are registered voters and live in a particular congressional district)

In addition to having the right data tool, you need staff people and/or volunteers who know how to use it. We recommend purchasing something that is intuitive and easy to use, as you will want all your organizers to be able to navigate the system easily. Once you have your system, invest in the training needed to make sure the relevant people are able to use it. Require that all organizers regularly input updated information. Consider segmenting your database not just by topic, but also by engagement level. As you grow your base, make sure your organizers are tracking and labeling the level of engagement for each person. Consider using the [Pyramid of Engagement](#) to develop your engagement labels.

³ The tax status of your organization determines whether or not you can be involved in political activities. In addition, individual funders pose different limitations on advocacy and political work. Be sure to check with your funders so you are in compliance.

The Pyramid of Engagement

Community Catalyst has created a framework called the [Pyramid of Engagement](#) that we use to describe the various levels of engagement by different organizations involved in a coalition. As we discussed, [coalition development is distinct from grassroots organizing](#). However, the Pyramid of Engagement is easily applied to grassroots organizing. The key concept is that cultivating an activist is a process, not a one-time conversation. People move up the Pyramid of Engagement by first becoming aware of an issue, then coming to understand its importance and relevance to their lives, then deciding to participate in a campaign and, only over time, developing leadership status within that movement. This process may or may not be linear, and not everyone continues to move up the pyramid. Some people will find the spot that is comfortable for them and stay there. That is fine - the pyramid is not meant to imply that one level of engagement is better than another. A strong base needs individuals at all the levels of the pyramid.

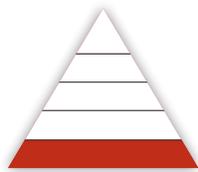


In an effort to more fully flesh out the pyramid and apply it to grassroots organizing, we have listed below a few examples of the types of activities in which an individual may participate at each level of the pyramid. We have also provided some suggestions for tactics that organizers can use to encourage grassroots constituents to move up to higher levels of engagement over time.



MINNESOTA

TakeAction Minnesota (TAMN) has a well-honed methodology for developing grassroots leaders and moving them progressively up a “ladder of leadership” from names on a list to active, skilled, powerful community leaders. They initially identify prospects through outreach in communities, contacts made by providing social services, and through larger events and gatherings. Once they’ve identified potential activists, they invite them to one-on-one conversations. During these conversations, the TAMN organizer will invite community members to engage in a town hall or similar activity. They will also encourage them to take on a role at the event, such as staffing a welcome table, or sharing their personal story. As people become more committed, TAMN creates opportunities to train them so they can learn more about the issue, deepen their political understanding, and develop leadership skills like leading a meeting or talking to reporters. Those leaders who continue to build their skills will end up giving testimony at public hearings, speaking at press conferences on local television, or taking an active role in making strategic decisions. Some of the people who first engaged in public life as grassroots leaders with TAMN have since gone on to become Board members, staff members, and elected officials.



Awareness

Has knowledge of an issue or cause

This is probably already happening regardless of your grassroots organizing capacity. Public events such as rallies, along with press and other communications, are part of how you make sure that people know about an issue and why it is important.

Examples of how people engage with an issue or movement on the awareness level are:

- Attending a community forum
- Reading an op-ed in the newspaper
- Watching coverage of a press conference



Photo Credit: Children’s Defense Fund, Texas



Understands the cause and is interested in learning more and perhaps participating

Once someone is aware, there is an opportunity to demonstrate the relevance of the issue to an individual and to help them understand what concrete actions they could take to get involved. To move people up the pyramid, you must engage grassroots constituents in [relationship-building conversations](#). You can have these conversations by:

- Phone Banking
- Canvassing door-to-door
- Canvassing on a city sidewalk, in a local park, or in front of the grocery store
- Talking to people at a forum or public event about the issue
- Talking to people at a festival or other un-related public event

Organizers should be both providing and collecting information during this process. Make it easy for people to find your social media pages, sign up for relevant email lists, and know who to reach out to for more information. Avoid extending vague, open-ended invitations. Ask for something specific, and always collect contact information from interested or potentially interested parties. Follow up with additional resources and opportunities, including but not limited to email blasts, social media, newsletters, volunteer opportunities, and phone calls.

Examples of how people engage with an issue or movement on the interest level include:

- Following an organization on Twitter or Facebook
- Signing up for an organization's newsletter
- Regularly reading an organization's blog

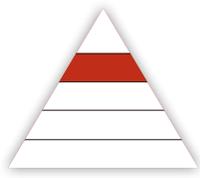


Contributes time, money, or social capital to the organization or campaign

This level of the pyramid usually marks the transition to activism. There are a multitude of ways for individuals to participate, and it is important to remember that not all activities will be equally attractive to everyone. Some people have time to make a call to their legislator but work a late shift that makes it difficult to attend a rally. If you are providing your grassroots constituents with adequate support, you will often find that their participation in one type of activity (for example, making a phone call) will be so empowering that the individual is inspired to do more next time (for example, meeting with a legislator).

Examples of how people engage with an issue or movement at the participation level include:

- Attending a rally
- Contributing a personal story
- Calling their legislator
- Making a one-time donation to support the cause



Commitment

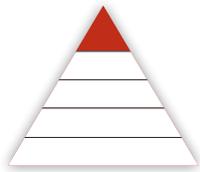
Fully invested in the mission & success of the organization or campaign

Whether an individual moves beyond the participation level of the pyramid depends largely on the experience they have with the organization. A skilled organizer makes sure that people are having fun and supports grassroots constituents every step of the way. Before an event, organizers work closely with volunteers to clarify messaging and explain the individual's specific role. During the event, organizers are present while grassroots volunteers participate, walking with them during a march or rally or accompanying them on a legislative visit. Following up afterwards with words of thanks and a description of the impact of their participation will make volunteers feel valued, increase the likelihood of future participation and cement their commitment to the organization or campaign.

Those who become committed to the mission and success of an organization, program, or campaign are sometimes called “super volunteers.” These are the people who step forward in multiple ways on multiple occasions over time. They are the most involved, and they are the people an organizer knows they can count on to show up and make an impact. As is true at the participation level, it is crucial that grassroots community members who engage at the commitment level have fun, feel valued and appreciated, and find their experiences empowering.

Examples of how people engage with an issue or movement at the commitment level include:

- Sharing a personal story at events or with the media
- Attending coalition meetings to develop a campaign strategy
- Regularly making a financial contribution



Leadership

Becomes a decision-maker or thought leader and engages and/or leads others

One of the most important aspects of organizing is cultivating leadership among the grassroots. Leadership involves decision-making and the ability to excite and engage others in doing the work of the movement. A community member turned grassroots leader is much more likely to create this kind of momentum in their community than an outsider. It is important to make space for emerging leaders to take on new responsibilities and to stand in the spotlight, and to provide opportunities for skill-building and guidance to grassroots leaders as they emerge.

Examples of how people engage with an issue or movement on the leadership level include:

- Training individuals in their community to understand and participate in a cause
- Leading meetings with policymakers
- Serving on a health reform advisory board or governance committee
- Hiring them as a staff organizer at your organization

Once grassroots leaders have been established, they can begin the work of organizing others and usher other grassroots constituents up each level of the pyramid until they, too, are ready to actively participate and potentially become leaders themselves.

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Campaign Plan Sample

2013 List Enhancement Contract

IT'S ALL ABOUT THE BASE:

A Guide to Building a Grassroots Organizing Program



TITLE: Grassroots Organizer

GENERAL DESCRIPTION: Advances the legislative, public policy and political goals and objectives of the organization. Position will be focused in the southeastern area of the state.

SUPERVISION: Reports to the Legislative Director

RESPONSIBILITIES:

- ✓ **As the Grassroots and Community Organizer:**
 - Works with outside organizations to maintain, expand and energize our grassroots organizing efforts, specifically around the organization's public policy agenda
 - Supports the grassroots and community outreach activities of the local bargaining units, especially bargaining units in contract negotiations
 - Manages, grows and activates community support for key legislation, specifically among seniors, other union members, consumers and patient advocacy groups
 - Organizes the grassroots political activities of the organization in the southeast region, including political campaigns, issue campaigns and membership education and mobilization
 - Assist with grassroots lobbying activities, postcard and petition drives, and letter writing campaigns
 - Writes updates for the newsletter and website as needed
 - Keeps informed of legislative and political trends, issues and current events, especially those affecting the health care industry
 - Identifies outreach opportunities and arranges logistics
 - Attends events and meetings as needed
 - Ensures necessary staff and materials are at events
 - ✓ **Provides staff services to the regional office:**
 - Attends Regional Council meetings and works in collaboration with the Council to target and advance goals and objectives of the organization
 - Assists in organizing new bargaining units
 - Works with local unit leadership to improve and maintain local unit organization, membership recruitment and communication
 - Evaluates local units' needs for educational programs and facilitate as appropriate
 - Assists members in using the resources of the organization
 - Interprets the goals and programs of the organization to local members
 - Reports on local unit activities and needs to supervisor, colleagues and management as appropriate
 - Keeps informed of economic trends, Labor Board decisions, and general trends in labor relations, especially those affecting the health care industry.
 - ✓ Participates in organizational staff meetings, serves on staff committees as requested and submits activity reports in a timely manner
 - ✓ Participates and assists the Board of Directors as assigned
 - ✓ Assists and participates in organizational conventions
 - ✓ Performs other duties as request
-

QUALIFICATIONS:

- ✓ Experience in grassroots organizing/community outreach
- ✓ Proven track record in outreach to organizations and various constituencies
- ✓ Proven ability to educate and stimulate individuals in the area of political and legislative action
- ✓ Strong verbal and written communication skills
- ✓ Effective public speaker
- ✓ Bachelor's degree with emphasis on Government, Politics, and/or Public Policy, or health care policy experience preferred
- ✓ Strong computer background, especially in using databases

OVERVIEW: We are a multicultural, senior-led grassroots organization empowering over 1,200 low- and moderate- income seniors statewide to use their own voices to address key public policy and community issues that affect their health and wellbeing. Members work together for quality health care, safe and affordable housing, accessible and affordable transportation and income security.

TITLE: Community Organizer, focused on the greater Metro area

RESPONSIBILITIES:

- ✓ **Support local chapter members in identifying and carrying out local and statewide policy campaigns and voter empowerment campaigns:**
 - Facilitate strategy discussions and setting goals with members
 - Recruit and reach out to members and to the local community
 - Work with members to implement tactics and reach campaign goals
 - Coordinate monthly chapter meetings, local campaigns and action committees with chapter leaders
- ✓ **Develop leadership skills of membership base**
 - Identify potential leaders
 - Provide individualized support and development for emerging leaders
 - Develop and conduct popular education workshops to enhance leadership skills and understanding of strategic issues among members
- ✓ **Work closely with statewide staff and membership to ensure that organizing work in chapters and across the state is well coordinated**
- ✓ **Conduct fundraising and local media work under supervision of Executive Director**
- ✓ **Sustain and strengthen local coalition of community organizations and allies**
- ✓ **Provide (or arrange) transportation as needed to support local organizing and enable members to participate in organizing activities**

QUALIFICATIONS:

- ✓ **Passion and commitment to grassroots social change, collective efforts to promote social justice and the empowerment of low-income, working class people**
- ✓ **Excellent computer, speaking, writing and interpersonal communication skills**
- ✓ **Capacity to think strategically and analytically about social, economic, cultural and political issues affecting a community**
- ✓ **Desire to learn and openness to challenge**
- ✓ **Experience working in communities of color and with seniors preferred**
- ✓ **Previous community organizing experience preferred**
- ✓ **Must own and operate a car and be willing to transport members**
- ✓ **Well-organized, punctual, self-motivated, quick learner who is interested in a broad range of issues**
- ✓ **Bilingual ability a plus**
- ✓ **People of color strongly encouraged to apply**
- ✓ **Two year commitment expected**

CAMPAIGN PLAN SAMPLE

Together for Medicaid Idaho March

13-June 9, 2016



Tactic (*Peak event)	Lead group	Measurable Impacts	What is our theory on how this will impact the target?
March 2017			
Physician meet and greet at Legislature and procession with message to state and federal representatives (3/9) *PEAK	Idaho MD residents and Idaho Voices for Children (IVC)	150 in attendance; 25 new healthcare professionals engaged; 5 of media hits; 3 meetings with secondary targets	Media coverage with messages targeted to Congress; educate and engage secondary targets (Gov. Otter and Idaho Legislature); grassroots capacity building
Email call to action opposing the AHCA and highlighting threats of new Medicaid financing	IVC	1,000 messages generated by the end of the month (567 already generated)	Constituent input to the Congressional delegation as the AHCA moves to the House floor and then to the Senate
March 16th National Call-In Day opposing the AHCA and changes to Medicaid financing *PEAK	IVC	Between 50-100 calls over the week.	Constituent input to the Congressional delegation as the AHCA moves to the House floor
IVC Press release sharing concerns about cuts for children and families in the AHCA (was released on March 16) *March 16 and 17 PEAK	IVC	5 media hits; 4 copies mailed to congressional delegation; distribution to 105 legislators, the governor and Lt. governor	Generate media scrutiny and pressure for Idaho's congressional delegation to oppose the AHCA and changes to Medicaid financing
Sign-on letter in opposition to the AHCA and its impact on Medicaid financing from all steering committee members of Close the Gap Idaho *March 16 and 17 PEAK	AARP, ACS CAN, American Heart Association, Central District Health, DisAbility Rights Idaho; Idaho Academy of Family Physicians; Idaho Asset Building Network; the Idaho Association of Counties; IMA; Idaho Public Employees Association; Idaho Primary Care Association; IVC; Saint Alphonsus Health System, St. Luke's Hospital	5 media hits; 4 copies mailed to congressional delegation; distribution to 105 legislators, the governor and Lt. governor	Demonstrate broad-based opposition from prominent health care stakeholders and advocates to the AHCA and the provisions that change Medicaid financing
Factsheet release: School age children covered by CHIP and Medicaid in Idaho *March 16 and 17 PEAK	IVC	5 media hits; 4 copies mailed to congressional delegation; distribution to 105 legislators, the governor and Lt. governor	Educate primary and secondary targets; media coverage; public awareness building
Factsheet distribution with charts illustrating CBO data *March 16 and 17 PEAK	IVC	5 media hits; 4 copies mailed to congressional delegation; distribution to 105 legislators, the governor and Lt. governor	Educate primary and secondary targets; media coverage; public awareness building
Factsheet distribution: The AHCA harms children and families *March 16 and 17 PEAK	IVC	5 media hits; 4 copies mailed to congressional delegation; distribution to 105 legislators, the governor and Lt. governor	Educate primary and secondary targets; media coverage; public awareness building

Tactic (*Peak event)	Lead group	Measurable Impacts	What is our theory on how this will impact the target?
March 2017			
Factsheet distribution: The AHCA harms children and families in Idaho *March 16 and 17 PEAK	IVC	5 media hits; 4 copies mailed to congressional delegation; distribution to 105 legislators, the governor and Lt. governor	Educate primary and secondary targets; media coverage; public awareness building
Meetings with Senator Crapo and Congressman Simpson *March 16 and 17 PEAK	IVC, Close the Gap, area physicians, Idaho health districts, disability community	At least 4 meetings in the last weeks of March and additional meetings in April	Provide direct input from stakeholder groups to Senator Crapo and Congressman Simpson with an emphasis on concerns related to Medicaid financing
Place two op-eds highlighting the threats to Medicaid from the AHCA *March 16 and 17 PEAK	IVC, United Way, area of physicians	Placement in 4 major papers; 4 copies mailed to congressional delegation; distribution to 105 legislators, the governor and Lt. governor	Generate media scrutiny and pressure for Idaho's congressional delegation to oppose the AHCA and changes to Medicaid financing
Presence or protest (depending on Simpson vote) when Congressman Simpson attends a "Politics for Lunch" event in downtown Boise on March 27	Close the Gap, Idaho Interfaith Alliance, United Vision for Idaho, Better Idaho	At least 30 people in attendance to thank or criticize Congressman Simpson. Intensity of presence will be determined by vote. If a vote has not occurred, presence will be friendly and questions will be submitted about the impacts of the AHCA	Demonstrate public opposition to the AHCA and its impacts at a highly visible event that Congressman Simpson will attend.
Outreach to minority populations and the disability community benefiting from Medicaid for story collection and calls to action	Centro de Comunidad y Justicia and The Idaho Council on Developmental Disabilities	30 people attending forums; 10 new stories collected; 4 copies mailed to congressional delegation; distribution to 105 legislators, the governor and Lt. governor	Engage Idahoans, specifically minority populations and the disability community, impacted by Medicaid; grassroots capacity building; generate diverse stories and contacts to targets
April 2017 (Congressional Recess April 10-21)			
Healthcare forum or tele-town-hall with Senator Crapo and Rep. Simpson during recess *PEAK	IVC AARP	Crapo and Simpson agree to forum; stakeholders participate; supportive statements from Crapo & Simpson; 30 in attendance; 4 of media hits	Educate and engage targets; generate statements of support from Crapo and Simpson; media coverage; test forum event and incorporate lessons learned in future in-person forums
Continue meeting requests at Crapo and Simpson offices statewide during April 10-21 recess April 10-21 *PEAK	IVC, Close the Gap, area physicians, Idaho Academy of Pediatrics, Idaho health districts, disability community; education stakeholders; AARP	At least 4 additional meetings in at least 3 different parts of the state	Provide direct input from stakeholder groups to Senator Crapo and Congressman Simpson with an emphasis on concerns related to Medicaid financing
Generate individual organizational letters of opposition to the AHCA with an emphasis on threats to Medicaid funding April 10-21 *PEAK	IVC, CTG members organizations, CCJ, disability rights organizations, Academy of Pediatrics, Idaho health districts, disability community; education stakeholders	At least 6 letters from key stakeholders in health care and those communities impacted by Medicaid cuts. 4 copies mailed to congressional delegation; distribution to 105 legislators, the governor and Lt. governor	Provide direct input from stakeholder groups to Senator Crapo and Congressman Simpson with an emphasis on concerns related to Medicaid financing

Tactic (*Peak event)	Lead group	Measurable Impacts	What is our theory on how this will impact the target?
April 2017 (Congressional Recess April 10-21)			
Send letters of Idahoans in affected communities to Idaho's congressional delegation, legislators and the governor about the impacts of Medicaid cuts April 10-21 *PEAK	Centro de Comunidad y Justicia and The Idaho Council on Developmental Disabilities	At least 2 letters a week for a total of 8 letters in April	Elevate the stories of impacted communities if Medicaid is cut for Idaho's Congressional delegation and other Idaho lawmakers.
Conduct Tele-Town Hall with Senator Crapo (potentially with Congressman Simpson too) This is already being arranged for April. April 10-21 *PEAK	IVC AARP	Senator Crapo and potentially Congressman Simpson participate in a health care tele-townhall hosted by AARP	Provide direct input from stakeholder groups to Senator Crapo and Congressman Simpson with an emphasis on concerns related to Medicaid financing
City Club of Boise presentation on the Future of Healthcare Reform (April 26)	IVC CTG Saint Alphonsus Hospital	Presentation will be from Corey Surber, a CTG steering committee member. At least 50 stakeholders concerned about health care and Medicaid financing attend the event	Create public education at a high profile event about the threat of changes to Medicaid financing
Presence at April 19 presentation to the Boise Chamber by Congressman Simpson April 10-21 *PEAK	IVC CTG Additional partners as specified in grant proposal	At least 20 stakeholders concerned about health care and Medicaid financing attend the event and ask at least 3 questions after the presentation related to health care	Generate public pressure and media scrutiny directly towards Congressman Simpson at a high profile public event
Meeting with Gov. Otter and staff to discuss Medicaid block grants	IVC	Secure commitment from Otter to make public statement	Educate secondary target; generate support from Otter that results in additional direct communications from the governor to Idaho's delegation
Stakeholder meetings with Senator Crapo and Rep. Simpson in local offices during recess	IVC and other stakeholders as appropriate	Congressional delegation agrees to meetings; # of meetings completed; education material provided to targets	Educate primary and secondary targets; build pressure on Senator Crapo; gather information about his stance and what additional info he needs
Participate in March of Dimes in Boise (4/29)	IVC	# of attendees receiving educational materials; # of actions taken	Build grassroots capacity; build awareness by an impacted population; generate direct actions to targets
May 2017 (Congressional Recess May 29-June 2)			
Release of audio-visual product that educates on Medicaid block grants *PEAK	IVC	# of media hits; copies sent to congressional delegation	Educate primary and secondary targets; public awareness building; grassroots capacity building; media coverage
Hold first meeting of new coalition	All new partners specified in grant proposal	At least 85% of partners specified in grant proposal attend	New coalition launches for strategic future action

Tactic (*Peak event)	Lead group	Measurable Impacts	What is our theory on how this will impact the target?
May 2017 (Congressional Recess May 29-June 2)			
Present at Idaho Healthcare Summit in Boise (5/15-16) (Congressman Simpson is also speaking at this event)	IVC	# of attendees receiving presentation; # of actions taken; # of new contacts	Engage new partners; build awareness among elected officials and healthcare leaders; generate direct actions to targets
Send letters of Idahoans in affected communities to Idaho's congressional delegation, legislators and the governor about the impacts of Medicaid cuts May 29-June 2 *PEAK	Centro de Comunidad y Justicia and The Idaho Council on Developmental Disabilities	At least 2 letters a week for a total of 8 letters in May	Elevate the stories of impacted communities if Medicaid is cut for Idaho's Congressional delegation and other Idaho lawmakers.
Continue meeting requests at Crapo and Simpson offices statewide during Senate Memorial Day Recess May 29-June 2 *PEAK	IVC, Close the Gap, area physicians, Idaho Academy of Pediatrics, Idaho health districts, disability community; education stakeholders; AARP	At least 4 additional meetings in at least 3 different parts of the state	Provide direct input from stakeholder groups to Senator Crapo and Congressman Simpson with an emphasis on concerns related to Medicaid financing
Georgetown Study release: Healthcare access for minority populations in Idaho	IVC, Centro de Comunidad y Justicia	# of media hits; copies mailed to congressional delegation	Educate primary and secondary targets; achieve media coverage framing the issue for rural population; build awareness among rural Idahoans
Participate in Komen Race for the Cure (5/13)	IVC and ACS-CAN	# of education material provided; # of actions taken	Sen. Crapo is cancer survivor; grassroots capacity building; public awareness building; generate actions to targets
Host a day of action for public (healthcare rally & contact Congressmen)	IVC	# in attendance; # of new contacts; # of media hits; # of meetings with secondary targets	Media coverage with messages targeted to Congress; educate and engage secondary targets (Gov. Otter and Legislature); grassroots capacity building
June 2017			
Mayor and other local elected official sign-on letter and op-ed released *PEAK	IVC	Stakeholders draft message; # of officials signing letter; letter mailed to congressional delegation; # of media hits	Educate primary and secondary targets; illustrate healthcare in Idaho; connect congressional delegation to stakeholders; grassroots capacity building
Hold additional meetings of new coalition	All new partners specified in grant proposal	At least 85% of partners specified in grant proposal attend	New coalition launches for strategic future actions and health care rally
Health care rally at the Idaho Statehouse and Statewide on June 2 May 29-June 2 *PEAK	IVC, CTG and new coalition partners as specified in the grant proposal	At least 50 Idahoans in Boise and 30 Idahoans in 3 different geographic areas attend a public event focused on protecting Idaho Medicaid	Demonstrate public opposition to the AHCA and its impacts at three highly visible events with messages focused towards Senator Crapo and Congressman Simpson
Tele-town-hall or community forum event in partnership with AARP and ACS CAN	AARP and ACS CAN	# in attendance, # of targets participating, # of media hits, messaging utilized correctly	Educate primary and secondary targets; media coverage; public awareness building

Tactic (*Peak event)	Lead group	Measurable Impacts	What is our theory on how this will impact the target?
June 2017			
Release updated Idaho chartbook *PEAK	IVC and Idaho Center for Fiscal Policy	# of media hits; copies mailed to congressional delegation and Idaho Legislature	Educate primary and secondary targets; media coverage; public awareness building

Monthly & Ongoing Actions			
Monthly event: Prayer for healthcare on Capitol steps by faith groups	Idaho Interfaith Coalition	# in attendance; # of new contacts and faith leaders engaged; # of media hits	Media coverage; grassroots capacity building; engage secondary targets (faith leaders)
Monthly event: Letter from impacted individual sent to congressional delegation and/or delivered in-person	IVC	Letter mailed or delivered to congressional delegation by individual	Increase primary and secondary target awareness of issue; illustrate healthcare in Idaho; connect congressional delegation to real Idahoans
Monthly event: Op-ed/LTE submitted by stakeholder or impacted individual	IVC & other stakeholders	Op-ed or LTE submitted by stakeholder; current messaging incorporated; # of media hits	Media coverage with messages targeted to primary and secondary targets; public awareness building
Monthly event: Coalition meeting and/or training event (in-person or via webinar)	IVC	# in attendance; # of new partners/coalition members	Engage stakeholders; educate stakeholders on current events related to campaign, new messaging, and new tactics
Ongoing action: VoterVoice email action to generate messages to congressional delegation	IVC	# of submitted emails	Generate large numbers of contacts to congressional delegation; demonstrate public support for our goals
Ongoing action: Postcards to congressional delegation (updated messaging)	IVC	# of mailed or hand delivered postcards	Generate large numbers of contacts to congressional delegation; demonstrate public support for our goals
Ongoing action: Social media presence	IVC	# of likes and followers; # of posts; engagement on posts	Educate and engage public; public awareness building; grassroots capacity building
Ongoing action: Contract with conservative lobbyist to influence primary and secondary targets	IVC	Primary and secondary targets agree to meetings; # of meetings	Inside strategy to build relationship with and influence targets; hired lobbyist used to work for Sen. Crapo and is trusted by conservatives
As-needed action: Tabling and/or speaking at conferences and other public events	IVC	# of invitations; # of events; # of material distributed; # of new contacts	Grassroots capacity building; public awareness building; generate direct actions to targets
As-needed action: Attend and generate turnout to Gov. Otter's Capitol for a Day events	IVC	# of attendees; # of material distributed; Gov. Otter addresses healthcare issue publicly	Engage secondary targets; generate statements of support from Otter; media coverage

2013 LIST ENHANCEMENT CONTRACT



Our organization offers enhanced voter information for the membership lists of 501(c)4 public interest groups in our state that are dues paying members of our organization, including but not limited to voter registration, voter history, voter profile, new legislative and congressional districts, and to the extent possible, updated telephone numbers and addresses.

_____ (“Member Group”) agrees to make its current membership list available to our contractors or staff for those limited purposes.

Member Group agrees to sign the usage policy of our data provider.

Our organization agrees to return the membership list to Member Group with enhancements added.

Our organization hereby agrees that all information contained in this list and all information associated with the list project will be held in strict confidence. We agree to take all reasonable precautions to protect the confidentiality of Participating Group’s list, and will not use the list for any other purpose.

Member Group agrees to pay a \$500.00 cost for this year’s list enhancement.

After returning all copies of the membership list, our organization will provide technical advice in interpreting the data to Member Group as requested.

Signed this _____ day of _____, 20xx by
