

Grassroots Organizing

Grassroots Organizing: Overview

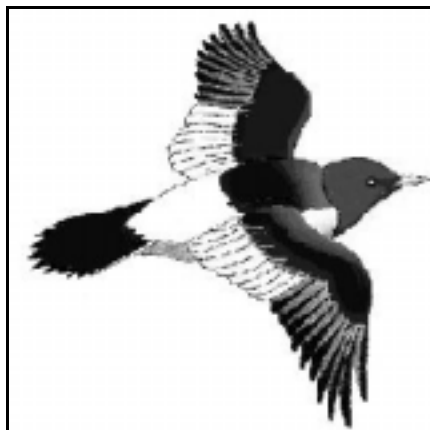
Creating a coalition of community members who are passionate about your issue and committed to your campaign is one of the most valuable and effective means you have of influencing policy makers. When people truly care about an issue (hopefully because you've inspired them to), they are more likely to do the work necessary to run a grassroots campaign. It takes a lot of volunteer hours to generate enough contact with people in the community to make your grassroots campaign successful. This section will help you understand the basic steps of grassroots organizing, which is mainly about motivating people:

Step 1 – Recruit volunteers.

Step 2 – Train volunteers and engage them in outreach activities.

Step 3 – Hold outreach events and meetings.

Step 4 – Build relationships and coalitions.



Red-Headed Woodpecker

Recruiting Volunteers

Your campaign needs volunteers to win. Finding volunteers who will help further your cause is not an easy task, but a necessary one. When you see how much more work your group will accomplish, the influence volunteers can make on others with their passion and energy, and how much more effective your campaign is, you will see that it is worth the effort.



Identify Jobs and Volunteer Needs

Before you start recruiting and accepting volunteers, it's important to identify what you want them to help you accomplish. Here are some things you can do to manage your volunteers effectively and get the most out of their efforts:

1. **List the specific jobs** that you need completed in order to meet your goals.
2. **Assign meaningful tasks.** Almost any task that needs to be done can be done just as well by paid staff as by a volunteer. Don't hesitate to give him/her an "important" job to do. Although there will always be grunt work to do, make sure all of your volunteers get assigned some meaningful tasks as well.
3. **Be flexible.** Many volunteers have a full work schedule outside of volunteering, which means that you need to have a flexible schedule.
4. **Write job descriptions.** This is important because it provides a guide for the volunteer. It keeps them on track and hopefully answers questions they may have when you're not there.

Make Sure Volunteers Are Satisfied

Don't take your volunteers for granted—they want something in exchange for their time commitment. They are, after all, taking time out from work, friends, hobbies, etc., to help you. If they feel they are getting something out of the experience, then they are more likely to stay on for awhile. For example, your volunteers may feel fulfilled simply by helping the community by supporting a cause they believe in; sometimes they just want to work with like-minded people who have interesting lives and are passionate about their endeavors. Take the time to find out what it is that motivates your volunteers and makes them feel satisfied.

Have a Plan

You now need to plan how to get people to join your campaign, while fulfilling their needs as well as your own. The more people that know about you, the bigger your audience is, and the more likely it is that you'll have high volunteer interest. Two common ways of getting volunteers are: 1) *Targeted recruitment*, which means that you find and pursue a specific audience; and 2) *Broad-based recruitment*, which means you attract the volunteers to your cause by, for example, maintaining a high media profile or advertising for volunteers. Broad-based recruitment also includes distributing materials, using referral services, and networking with other community groups. Here are some tips:

1. **Keep it simple.** Use the network you've already built up to locate new recruits. This gets rid of a lot of guesswork. And **always be ready to make new contacts**—anyone is potentially a volunteer or knows someone who could be.
2. Where are they? **Volunteers can be found everywhere** (e.g., job seekers, churches, public agencies, colleges, sororities and fraternities, etc.).
3. **Give them information.** Post materials in offices, schools, newspapers, and libraries. You want to maximize your exposure.

Inviting People to Volunteer

Now it's time to recruit! Here are some tips on how to invite someone to volunteer:

1. **Know the audience.** Make sure this person shares your group's views.
2. **Personalize it.** Let them know what a great fit they would be for the position.
3. **Be enthusiastic.** Show them how much you care about your work. Enthusiasm can be contagious.
4. **Be realistic.** Make sure you understand their availability and how much they can reasonably accomplish.
5. **Follow up.** If the person is willing to help, make sure you contact them and get them oriented and trained as promptly and efficiently as possible.
6. **Accept "No."** Some people just aren't going to be able to help, no matter how much they fit the position. Be friendly towards the folks who say "No" to you because you want to keep the door open to future possibilities with them.

Tasks for Volunteers

Now that you've recruited your volunteers, you need to figure out what they are going to do. Here are some ideas for volunteer tasks:

Events

- Staff an outreach table at an event
- Hand out leaflets about your campaign at a local sports event
- Attend community meetings to gather and distribute information
- Attend press conferences
- Host a house party for fundraising, letter-writing, or an informative presentation

Media Work

- Assemble or update a media contact list
- Draft letters to the editor for activists to sign and submit
- Research news sources and clip articles on your issues
- Create visuals or materials for a media event

Administrative Work

- Enter new names into a database
- Call through lists to recruit new volunteers
- Arrange meetings with decision-makers
- Update files

Tips on Maintaining Volunteers

1. **Combine your goals with their goals.** Your volunteers should be able to help you achieve your goals and their goals at the same time. For example, if they want more experience writing and editing, let them work on your newsletter or press releases.
2. **Ask them to take on more responsibility.** Once someone has been working with you for awhile and is doing a great job, reward them with more responsibility. You need them, and this lets them know how important they are to your campaign.
3. **Recognize your volunteers' good work.** Praise them frequently for their hard work and offer occasional perks, such as ordering pizza during a late-night phone bank.
4. **Have fun!** Volunteering is a great way to meet people and have a good time.

The Phonebank: Calling for Clout



Collective phone-calling (called a phonebank) is a very effective way to inspire conservation action, do fundraising, and attract people to meetings and events. They are also easy to organize if you follow the tips below. Phonebanks work well because volunteers are grouped together for the same purpose with the same goals, and this creates an atmosphere of excitement and accomplishment. Their collective phone calls can generate comment letters, votes, money, and/or more volunteers.

Why Do a Phonebank?

1. **Generate conservation action.** Phonebanks can reach a large number of people to produce comment letters and encourage turnout for a public hearing. Many people respond to a direct phone call from a volunteer, whereas they might not be responsive to a letter or email from you.
2. **Invite people to an event.** Phonebanks let you personally invite your supporters to a special event your organization may be holding or attending. You can also follow up on a previous invitation to find out if they plan to attend.
3. **Raise funds.** Many volunteers find it much easier to make fundraising calls in the group atmosphere of a phonebank than on their own. Fundraising phonebanks are usually used as a follow-up to a direct mail letter.

Steps for a Successful Phonebank

1. **Start planning in advance.** You will need time to recruit volunteers and arrange a location for the phonebank. Figure out ahead of time how many phone lines you will need. Hold the phonebank at least 7-10 days before the hearing, comment deadline, or event.
2. **Define a target audience.** Who do you want to call? How many people? This will help you plan how many volunteers you will need for the phonebank. (Keep in mind that one volunteer can reach 30-40 people per hour.)
3. **Find a location.** You will need a place with multiple telephone lines and phones. The best location is an office—your own or another organization's. Check with your friends and supporters to see if someone is willing to donate office space and phone lines for an evening. To best reach people, phonebanks need to be held between 6PM and 9PM weekday evenings. Don't call after 9PM!

4. **Recruit and schedule volunteers to make the calls.** Gather volunteers from your supporter/membership lists and past volunteer lists. Provide refreshments and beverages to create an enjoyable atmosphere and emphasize the chance for volunteers to meet each other. Remember that phonebanking is hard work, so don't overwork the callers! Keep the shifts short (2-3 hours).
5. **Produce the calling lists.** Depending on the objective of your phonebank, your calling list might include all members of your group, all those in a particular legislative district, activists only, or donors only. Divide the list into sections so each person can have a separate list to call from; include space for the caller to write notes (such as "number disconnected" or "will attend hearing").
6. **Create the phone script.** A script gives volunteers more confidence when calling someone they don't know. It includes all of the important information and helps them sound professional. Include an option in your script for leaving a message on voicemail. (See the sample phone script at the end of this section.)
7. **Don't forget the small stuff.** Provide pens and paper to help your callers record important information about the phone call, such as who they contacted and the result of the conversation. Remember to buy food and drinks for the volunteers.

Tips for Callers

- Always be polite and considerate. If the person you called is rude, don't argue with them. Instead, end the call as quickly and politely as possible by saying, "I'm sorry you feel that way. Thank you for your time."
- If the person you called has questions you can't answer, ask the coordinator to handle them.
- Write something down about every call you make, such as "left a message" or "pledged to donate \$20," etc. Get it down on paper before you forget!
- Remember to get up and stretch. Calling can be tiresome, so it's good to take frequent stretch breaks.
- Keep a glass of water by your calling station in case your throat gets dry.

The Evening of the Phonebank

1. **Appoint an experienced phonebanker to be the coordinator.** This person should arrive early to set up food, check over calling lists, and organize the materials. Besides overseeing callers and answering any questions, this person can tally the responses that callers are getting and periodically announce the success rate (e.g., number of people who will attend the hearing). This type of progress report will keep up the spirits of the volunteer callers.
2. **Start with a brief training for the callers.** To train callers, review the script together, have people practice on each other a few times, and make sure people know how to record responses on their lists or tally sheets. Then you should answer any last questions to calm nerves and get started!
3. **Make the phone calls.** If people are not home, either leave a message on the machine or record their absence so someone can try them again later. Again, don't ever call later than 9PM.

Writing the Telephone Script

Write the script so that it navigates your volunteer caller through the question-and-answer scenarios that you need covered. At each place in the script where the person being called answers a question, the caller needs to be directed to the next appropriate place in the script. Make these places easy to find by using arrows or some other highlighting. Also, give your callers a fact sheet about the issue/event along with the script. This way they can answer most of the questions they get asked. Here's a sample telephone script:

Hi, my name is _____, and I'm a volunteer at _____.
May I please speak with _____?

I'm calling to invite you to our upcoming naturescaping workshop at the Northtowne Community Center on July 6th. We sent you a postcard about it last week. Are you interested in attending this free workshop?

IF YES: Great! I am reserving a seat for you. We will see you on July 6th at 7PM. Thank you so much for your time!

IF NO: Thank you for your time. Have a nice evening.

IF THEY'RE NOT HOME, LEAVE A MESSAGE:

Hi, my name is _____ and I'm a volunteer at _____. I'm calling to follow up on an invitation we mailed you last week for our naturescaping workshop on Thursday, July 6th at 7PM at the Northtowne Community Center. The workshop is very informative, and it is free to our members. Please call us for more information at 555-5555. Thank you, and we hope to see you there.

Successful Meetings

True organizing can only happen on an individual and personal basis. Face to face meetings are extremely important to building relationships and getting tasks accomplished, but they can also be an enormous waste of time if not prepared for and conducted properly. Follow these tips for better, more efficient meetings:



The Basics of a Good Meeting

- Designate a facilitator who moderates discussion, sticks to the agenda, and watches the clock.
- Designate a note taker who will distribute the notes to the group afterward. This way no one else has to take notes.
- Provide a comfortable setting with beverages and light refreshments.
- Prepare an agenda that is not overly ambitious.

Preparing for the Meeting

- Spend twice as much time preparing for the meeting as the length of the meeting.
- Set clear goals for the meeting and prepare an agenda that is within the time frame.
- Call all participants in the meeting individually ahead of time and talk to them about the goals of the meeting and the agenda. This is particularly important with those people who you know have a tendency to steer meetings away from the set agenda and on to their own agenda. Doing these pre-meeting contacts will help them understand that your goals are their goals, too.
- Prepare the meeting room and get all the necessary materials: easels with paper and markers, refreshments, pads of paper, pens, and copies of the agenda.

Running the Meeting

- One frustration people have with meetings is that people talk at the start and the meeting ends up starting late. To address this, especially if folks know each other, go ahead and allow 10 minutes of “chit chat” time on the agenda. The chit-chat will happen anyway, but planning for it will prevent it from cutting into your meeting time. Also, this social time helps ease tension from the workday and put people in a good mood.
- Introductions are important. Begin the meeting by going around the table and having everybody introduce themselves.

- Keep the discussion relevant by letting the participants know when the discussion has drifted. If this fails to bring it back on track, politely but firmly steer it back. Cut off the discussion when it becomes repetitive.
- Emotional discussions often occur. Don't invalidate a participant's feelings by cutting them off. Acknowledge it when someone is obviously angry so that they feel they are being heard and that it is all right to be honest.
- Listen for agreements. If an agreement seems to be emerging on an action item, try repeating what you think you are hearing from the group back to them. They may still want to continue discussion, but there may be enough agreement that you can move on to the next action item. If agreement seems to have been reached too easily, do test the agreement out on the group until it is clear that everyone agrees.
- When the meeting ends, make sure everyone knows which follow-up tasks they agreed to do.

Building Relationships and Coalitions

One of the most important tasks in organizing a grassroots advocacy effort is establishing a broad base of support. The key to doing this is through outreach to other groups and audiences. When you join voices with other influential people in the community, your message takes on added credibility. There are many potential allies for your cause. Even though you may not agree with someone on all issues, they may still be a valuable ally. Search for common ground and shared concerns.



Steps for Building Relationships

1. Identify the influential groups in your community who you would like to partner with in a coalition. Think through how their issues and yours might intersect. Having related interests can provide the common ground you need to build relationships with them. For example, here are some groups and potential shared issues you might consider:

- Transit users (*transportation issues*)
- Inner-city community groups (*environmental justice*)
- Teachers (*environmental education issues*)
- Scientists (*most environmental issues*)
- Outdoor recreation enthusiasts (*habitat protection and trails*)
- Water sportspersons (*river issues*)
- Small business owners (*fighting sprawl development or corporations*)
- Labor unions (*international trade issues*)
- Homeowners (*land use issues*)
- Hunters and fishers (*habitat protection*)
- Farmers (*protecting rural areas from sprawl*)
- Tribes (*salmon recovery*)
- Faith-based groups (*protecting the environment because it's a creation of God*)

2. Identify who in your organization or existing network has access to your potential partners. Also identify who you'd like to meet with in these targeted groups.

3. Set goals for cultivating your relationships. Be realistic about who you have access to and who you can reach.

4. Make contact. Meet over coffee. Explain your issue and why you think their group is a natural partner for delivering your message. Emphasize how your issue intersects with and impacts their group. Approach your contact with the attitude that a coalition will be useful to both of you.
5. Use every opportunity to build your relationship with the contact and their group. Ask them to be a part of your coalition, to attend meetings with legislators with you, or to speak at your next news conference.

Tips for Building Relationships

- For the initial contact, try to meet face-to-face for no more than a 15 to 30 minute meeting. Be very focused and quick; this gives the sense that you are well-organized.
- Be careful and willing to learn as you go. When you are talking to someone who is from a group that you know little about, be prepared and committed to learn from them.
- Focus on the commonalities, not the differences.
- Be respectful of time commitments. Your issue is not central to their group, so don't expect them to put as much time into your cause as you do. Be appreciative of whatever support they can provide.
- Only ask people to speak from their own expertise and experience. After all, you are partnering with them because they can deliver your message from a *different perspective* than you can.

Outreach Events

Outreach and public involvement are among the most important building blocks of any grassroots campaign. The will of the public is a very powerful force. Outreach events are a good way to get your message to the public. However, the success of the outreach effort will in large part hinge on how well the event was organized. Here are some tips for organizing successful outreach events:

- **Publicize educational meetings in the media.**
- **Prepare a “Meeting Survival Kit” with the essentials for conducting any meeting.** Include such things as:
 - ◇ Registration sheet for attendees
 - ◇ Name tags
 - ◇ Double-faced tape
 - ◇ Logo banner for podium
 - ◇ Pencils, markers, and pens
 - ◇ Paper
 - ◇ Scissors
 - ◇ Extension cords and extra projector bulbs
 - ◇ Masking tape
 - ◇ Paper clips
- **Look professional!** Recognize that your audience will get a first impression of you from your appearance and behavior.
- **Develop a detailed outline** to organize the meeting.
- **Prepare visual aids** that will assist you in your message delivery.
- **Preview all audio/visuals** and determine how to operate the equipment. Be sure that visuals are complete and that slides are properly in place. Always pack extension cords and extra bulbs.
- **Become familiar with the meeting room and the meeting location.** Locate the light switches, room temperature control, water fountain, and restrooms.
- **Have the meeting room arranged** with chairs in place before attendees arrive.
- **Have people sign in** at a greeting table by the entrance.
- **Use name tags** for participants.

Action Alerts

An action alert is a message that someone sends out over the Internet or in the mail. It asks for a specific action to be taken, usually on a current political issue. Well-designed, compelling action alerts are a powerful way to get people's attention and get them involved. They also provide far-reaching exposure for your cause.

Action alerts are very effective when sent to your organization's mailing list and to other organizations with similar messages. These people are more likely to pay attention to the issues, not only because they are part of your group and share your interests, but because they are probably already active in other ways in the community and have an ear for what's going on.

Helpful Hints

- Identify your issue. Make sure that the headline is compelling, so that the reader is interested in reading further.
- Make sure you note the date. Action alerts can travel around for a long time and eventually become outdated. You want people to know when the alert is active and when they will be most effective in responding.
- Be concise. Effective message delivery includes a clear, concise message that people can easily understand. But avoid cutting out anything compelling when you compact the message.
- Provide the next steps. People care more about an issue when they become actively involved in its progress, but they often don't know how to help. Tell them, for example, to call or write their representatives and express their view on a certain issue.
- Be compelling. You are trying to inspire people to take action. Speak from your heart about why this issue is so important to you and to the community. Get people excited.
- Include your group's information. This helps establish the authenticity of the alert, making it more credible to the activist community.
- Use short paragraphs. Small sections have greater visual appeal and are easier to read.
- Be factual. You are responsible for the information you are sending out. Mistakes can discredit your entire organization.
- Don't assume your readers will be educated on the issue. Give them enough information to fully explain your position, but don't overload them with material.

- Include clear beginning and end markers. Put a row of dashes or a graphic border along the top and bottom, so that any additions made by people other than yourself will clearly be modifications to your original.
- Ask for feedback. Tell people you want to know what they've done (e.g., sending letters or emails or making phone calls). This gives you an idea of who you can count on to be more active in general. It also gives you great statistics to present to a representative's office.
- Be selective in the number of action alerts you send. People can easily get sick of them.
- Follow up. When the campaign is over, try to derive some lessons that others can benefit from. What problems did you have? What mistakes did you make? What unexpected connections did you make?

Tips for Activists

- Think big, start small
- Strength is in numbers
- Learn from those with experience
- Protect your base of supporters, convince the swing, and forget the rest
- Always tell the truth
- Create small successes to build confidence and momentum
- Endless pressure, endlessly applied
- Celebrate each victory as it happens
- Take stock in your strengths
- The most important resource to conserve is your supporters' energy
- Form broad coalitions
- Localize and personalize your issue
- Stay on message, always
- Have echo power—your listeners remember and repeat your viewpoints
- Don't rest on your laurels—focus your message on the future
- Have fun!