

# Illinois Community Action Association

## Grassroots Organizing Plan

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## Executive Summary

In July 2003, Illinois Community Action Association (ICAA) hired Grassroots Solutions to help upgrade the organization's capacity for grassroots engagement. The project consisted of training and grassroots organizing planning. The training portion of the project consists of two day-long trainings that build on one another, delivered in September and December of this year.

At ICAA's request, the grassroots organizing planning centered around modifying the Minnesota Community Action Association plan that Grassroots Solutions completed for MCAA under separate contract. Customarily, Grassroots Solutions does not use a "standard" plan for clients, but rather creates plans that address the unique features and needs of the client. Because ICAA was familiar with MCAA's grassroots assessment findings and saw similarities between the two networks, Grassroots Solutions agreed to modify the MCAA plan. This had the benefit of reducing cost for ICAA, while recognizing that the plan is not as customized to the ICAA network. In order to ensure relevance, Grassroots Solutions conducted a mini-assessment of the ICAA network, and found that there are key similarities between MCAA and ICAA that are addressed in this plan:

- Community Action agencies have shifted away from their original purpose—a balance of direct service and advocacy—to a heavy emphasis on direct service and lower commitment to advocacy.
- Some Community Action staff are hungry to be more active in advocacy; others are wary. This calls for cultivating those who are interested and bringing along those who are reluctant.
- ICAA's network relies heavily on Executive Directors as advocates and Executive Directors are pressed for time; there is a need to engage other staff in advocacy while calling on Executive Directors to weigh in as experts when they are most needed.
- Community Action stakeholders need training and tools to be effective.
- ICAA needs to shift from a case-by-case, "fire drill" approach to advocacy to a year-round advocacy cycle.

This plan encompasses the following elements:

- I. **Introduction:** The introduction states the grassroots goals, provides defining characteristics of the grassroots goals, and introduces the concept of an ongoing advocacy and engagement cycle. This ongoing cycle serves as the organizational foundation for the entire grassroots plan and for ICAA's grassroots efforts.
- II. **Infrastructure:** This section outlines the structural elements ICAA will need to implement the plan, including a Grassroots Club, an Executive Director peer-to-peer program, technology, staffing, communications, and lists.
- III. **Grassroots Cycle - Planning Phase:** In this phase of the advocacy and engagement cycle, ICAA and its member agencies will identify policy and grassroots goals for the year, develop internal and external messages, target legislators, and target constituencies for recruitment.
- IV. **Grassroots Cycle - Education and Recruitment:** Elements of this phase include an internal grassroots education campaign that both "sells" grassroots and provides ongoing training to increase ICAA's capacity for grassroots engagement, along with additional volunteer recruitment strategies.
- V. **Grassroots Cycle - Volunteer Mobilization:** This phase provides the tools that volunteers will need to be effective grassroots advocates.
- VI. **Grassroots Cycle - Volunteer Recognition and Evaluation:** This final phase of the cycle provides ways to recognize volunteers and evaluate ICAA's grassroots efforts. It naturally connects the end of the cycle to the beginning of the next cycle, because it informs the planning and prepares volunteers for another phase of education and recruitment.
- VII. **Conclusion**

## I. Introduction

### A. Grassroots Goals and Characteristics

The ultimate objective of this grassroots planning process is to elevate ICAA's and its member agencies grassroots efforts to the next level of effectiveness by developing a permanent grassroots infrastructure. Two goals serve as the basis for this Grassroots Plan.

#### 1. Grassroots Goals:

*Goal One: Create an environment within Illinois Community Action Association and its member agencies that is uniformly supportive of legislative advocacy, grassroots organizing and political engagement.*

*Goal Two: Implement a sustainable year-round advocacy and political engagement cycle in which ICAA and member agencies are continually expanding their capacity for mobilization, by recruiting and empowering an expanded universe of people who care about ICAA's issues.*

#### 2. Grassroots Characteristics: In addition to the two long-term goals, the process of building a permanent grassroots infrastructure around ICAA's policy initiatives requires a number of defined characteristics. By integrating the following characteristics into the organization's work, ICAA and its member agencies will be able to lay an even stronger foundation for a sustainable year round advocacy cycle.

- **Permanence:** The scope and complexity of ICAA's range of issues, combined with the slow pace of political change and the inherent obstacles in maintaining coalitions, dictate the importance of creating a permanent grassroots infrastructure. Simply organizing for any single legislative session will not advance ICAA's issues to the extent necessary. Unless policy makers know that there is a permanent force in place in support of these important issues, they will stall, try to divide and conquer the organization, or engage in half measures.
- **Grassroots Ownership:** The grassroots infrastructure that is built to support ICAA's legislative agenda must be truly grassroots in nature. It cannot be a top-down organization. Rather, the people involved at local levels must have some level of control over establishing priorities and generating grassroots activism.

- **Passionate Organizing:** The entire effort of building a sustainable grassroots advocacy and engagement cycle is about Illinois' most vulnerable populations. The spirit of these people must always remain at the center – the core – of the entire endeavor. It cannot become simply about policy victories, or amassing grassroots power – it must always come back to what is best for ICAA's clients.
- **Action-Oriented:** A sustainable grassroots advocacy and engagement cycle to support ICAA's core issues is a vehicle for real change. Discussion, analysis and studies will continue to take place, but the grassroots infrastructure is an advocacy tool devoted to persuading elected officials to actively support ICAA's core agenda and in turn the support of issues that effect Illinois' most vulnerable population.
- **Inclusive:** It is critical that ICAA stay connected to subgroups within the Community Action network, such as advisory council members, parents, and board members. As the buy-in from the Community Action Agencies and its various subgroups grows, the organizing effort should reach out to potential allied organizations and constituencies such as the broader nonprofit, faith, business, and medical communities.

## **B. Plan Assumptions**

The grassroots plan is based upon a set of assumptions that came from the assessment of Minnesota Community Action Association that was conducted by Grassroots Solutions as part of developing the MCAA plan. In addition, these assumptions are based on supplementary assessment interviews of ICAA stakeholders conducted in September of 2003. The assumptions are:

- **Illinois Community Action Association and member agencies should define their roles as advocates and service providers.**
- **Illinois Community Action Association should implement an educational campaign with their individual Community Action Agencies to explain the importance of advocacy and political engagement.**
- **Illinois Community Action Association should set up a comprehensive multi-track training program throughout the year to provide leadership, staff and volunteers with advocacy and political engagement tools.**

- **Illinois Community Action Association should utilize available technological tools to both engage agency members in grassroots activities, and also set in place a system of grassroots accountability.**
- **Illinois Community Action Association should provide its agencies with periodic short and concise Advocacy Tool Boxes that consist of message and tools for supporting each phase of the organizing and advocacy effort.**
- **Illinois Community Action Association should ensure Association wide understanding of appropriate political activities.**

### **C. Grassroots Advocacy and Engagement Cycle**

In order to be even more successful at grassroots advocacy, ICAA and its member agencies have to make it a year round focus. Grassroots activities must extend well beyond the months immediately before and during the legislative session. By continuing to do organizing and advocacy activities throughout the year, ICAA will be better able to sustain the momentum that is needed to keep ICAA and its member agencies focused on grassroots advocacy.

The second grassroots goal addresses the idea of adopting an approach where each year of organizing builds on the preceding year. While this means accepting that ICAA and its member agencies will not accomplish everything all at once, that is the nature of grassroots advocacy. Instead, through strategic planning, systematic organizing, and regular evaluations, modifications and adjustments, ICAA will continuously strengthen and expand its grassroots capacity.

Illinois Community Action Association should begin to think of its grassroots advocacy efforts in terms of an ongoing cycle that continuously repeats itself. Each phase of the cycle builds on the preceding phases and establishes the foundation for the subsequent phases.

This cyclical approach provides a consistent organizing framework that can be regenerated over time, allowing ICAA to build each on each completed cycle with specific goals and activities. The ICAA advocacy cycle will consist of four distinct phases. All of ICAA's grassroots activities and tools will correspond to one of these phases: Planning; Education and Volunteer Recruitment; Volunteer Mobilization; and Volunteer Recognition/Evaluation.

## **II. Infrastructure**

There are structural elements that ICAA needs to put in place before any organizing can begin. They include:

- Staffing
- “Peer to Peer” Leaders’ Program
- Grassroots Club
- Developing and Obtaining Lists
- Technology
- Communications
- Nonprofit Advocacy and the Law

### ***A. Staffing***

This is the first structural element needed before organizing can begin. There are a few options to consider when staffing grassroots organizing: dedicated staff, a shifting of existing staff responsibilities, or a combination of these.

#### *Dedicated Staff*

Because grassroots advocacy is labor-intensive, if existing ICAA staff can’t accommodate this project or cut back in other areas, it is a setup for failure because there will not be enough time to recruit volunteers, plan mobilizations, coordinate strategy, track activities, and keep volunteers engaged.

Because this plan is structured for long-term infrastructure-building, ICAA will need to dedicate staff resources by either assigning organizing responsibilities or hiring an organizer to implement this and future grassroots advocacy efforts. Our experience after working with MCAA for three years confirms the need to have dedicated staff for organizing. Depending on whether it is a full- or part-time organizer, the benefits include:

- Increased likelihood that ICAA could run a focused, energetic initial grassroots campaign
- Safeguarding staff capacity for programs to which the existing ICAA staff is already committed
- Additional capacity for long-term grassroots advocacy efforts

#### *Alternative to Dedicated Staff*

If hiring a part-time organizer is not financially feasible, ICAA should conduct an analysis of current staff time and priorities to determine which staff members will be able to shift their priorities or expand their hours to take on responsibility for organizing. ICAA should then assign staff roles based on this analysis.

### ***B. Peer-to-Peer Leaders' Program***

Executive Directors of Community Action agencies play a unique role in the ICAA network, and can significantly influence the success of the overall grassroots advocacy program. Some Executive Directors express anxiety about grassroots advocacy activities and view themselves as gatekeepers for their agencies. In order to assuage any fears that Executive Directors have about grassroots advocacy and to break down "gatekeeper" barriers that prevent ICAA's access to potential grassroots volunteers, ICAA should establish a "Peer-to-Peer" Leaders' Program. This is the second structural element that ICAA needs to have in place before organizing can begin.

The "Peer-to-Peer" Leaders' Program would identify those Executive Directors, senior staff, or Board members who are excited about and supportive of ICAA's grassroots advocacy efforts. These Leaders would be briefed about the overall plan, with an emphasis in giving exciting, reassuring, and clear perspective on the effort.

The Leaders would then be matched with Executive Directors, senior staff, or Board members in the network who are reluctant or anxious about grassroots advocacy. The purpose of the program would be to identify barriers and concerns, provide answers to those concerns, and act as a resource for how to comfortably get involved in grassroots work at an acceptable pace for each individual leader.

### ***C. ICAA Grassroots Club***

The third structural element ICAA needs to have in place in order to begin is a "Grassroots Club". The basic idea of a Grassroots Club is to create a vehicle that inspires people to volunteer and builds in a system of accountability. All staff members, board members and clients would be eligible for membership in the club. People could join in the following ways:

- Sign up on the web site.
- Sign up to participate in a specific grassroots advocacy action.
- Participate in a grassroots advocacy training.

Members would be expected to participate in and report back to ICAA on at least one grassroots advocacy activity per cycle. As the membership grows, members who are particularly active could be "promoted" to special status in the club. For example, the MCAA Grassroots Club is called the PAL (Power-Action-Leadership) Team, and those who are particularly active are called PAL Pioneers.

Benefits of being a Member include:

- ✓ Recognition on ICAA's web site
- ✓ Recognition at conferences and trainings

- ✓ Annual certificate of membership
- ✓ Training and recognition events

Incentives such as inexpensive tokens, laminated inspiring quotations, certificates, and thank you calls, notes, and letters can serve as motivation to participate in the Grassroots Club. While an incentive program like this will create some administrative and logistical work, it is one of the best ways to help build a volunteer base. It also demonstrates that ICAA does value grassroots participation and is willing to recognize and validate the importance of volunteering in a grassroots effort!

#### ***D. Developing and Obtaining Lists***

Lists are the fourth structural element ICAA needs before organizing can begin.

##### *Agency Lists*

When MCAA began to implement their plan, one of the biggest challenges they faced was their lack of lists of potential volunteers. They had no lists of local agency staff or board members, and this made it difficult to recruit advocates. Furthermore, Executive Directors were cautious – as they should be – about sharing those lists.

ICAA should take the time to be systematic about developing and obtaining lists of potential volunteers. A big part of this is communicating with and reassuring Executive Directors. ICAA should consider obtaining lists by:

- Making an initial call to Executive Directors to explain the overall plan and gauge their support and comfort level.
- Working with supportive Executive Directors to obtain lists (providing written explanation of what the lists will and will not be used for if necessary)
- Matching reluctant Executive Directors with “Peer-to-Peer” Leaders and allowing for comfort to grow before asking for lists

##### *Agency Contacts*

ICAA has already begun to build lists by requesting that two identified people serve as links between local agencies and ICAA regarding grassroots activities. These contacts can be trained to begin developing their own lists – essentially, recruiting their colleagues into the Grassroots Club themselves.

##### *Existing ICAA Lists*

Anyone who attends the ICAA grassroots advocacy trainings now or in the future should be added to the Grassroots Club membership lists. Additional recruitment can come from lists ICAA already has at their disposal.

### *E. Technology*

Technology is the fifth structural element to put into place. When MCAA began their grassroots plan, their web site was fairly static and they were not able to make changes to it in-house. After struggling with this setup for two years, we helped MCAA transfer their web site to a web platform that allows them to design and change all their web site content from any desktop in the agency, and the web site has become a major tool for organizing across the state. With this added technology capacity, MCAA can now load grassroots tools on the web site, provide on-line advocacy activity reporting forms, survey their members, upload up-to-the-minute legislative reports, and more. Based on this experience, ICAA should consider ways to use their web site as an organizing tool by creating sections on the site for grassroots advocacy information. The following are aspects of this grassroots plan that could be integrated into ICAA's web site:

- **The Grassroots Club:** There should be a way that people can sign up to be involved in these activities through the website.
- **Accountability:** There should be a mechanism that aids in keeping people accountable for the grassroots advocacy activities that they have agreed to take part in.
- **Grassroots Toolboxes:** ICAA should post the different toolboxes that were included in the plan on ICAA's homepage.
- 
- **Grassroots Calendar of Events:** A calendar can not just be useful to people who are interested in events, it can also be used as an education tool for people to see what their individual organization can do to be more involved in grassroots activities.
- **ICAA Grassroots Success Stories:** Like the calendar of events, a section with success stories can be useful for giving other agencies ideas. Good grassroots stories can also be used in various materials that are produced by ICAA and its member agencies, such as press releases, letters to the editor or organizational brochures.

While the content of the site is very important, it is irrelevant if nobody goes to the site. Every communication the organization puts out should have the website mentioned prominently to help drive traffic there.

ICAA and its member agencies should reach out to the organizations that they work in conjunction with to see if a link can be added to their website that will drive people to ICAA's site. The more people driven to this site, the more exposure the organization gets and the more volunteers are recruited.

## ***F. Communications***

Preparing a communications structure is the sixth structural element. The foundation for ICAA's relationships with grassroots advocates is communications. There are three basic communications components that ICAA should have in place for its grassroots efforts:

1. Phone program
2. Email Updates
3. Web Tools

### *Phone Program*

ICAA should put a phone program in place that tracks contact with grassroots advocates and serves as the ongoing method for recruiting, building relationships with, and mobilizing volunteers. It should include phone scripts, call sheets, and tracking mechanisms so that the organizer(s) can easily reference who they contact from day-to-day and what follow-up they need to do for each call. Samples are included in the appendixes.

### *Email Updates*

Grassroots club members should receive regular email updates that are short, inspirational, and include a call to action. Rather than serving as the primary vehicle for communication, however, email should serve to reinforce the activities being pursued through the phone program, and should drive people to the web site for more information. Email is rarely if ever an effective mobilization tool in and of itself; it must be followed by personal contact. A sample update is included in the appendix.

### *Web Tools*

As noted in the Technology section, ICAA should develop sections on the web site that are devoted to grassroots advocacy.

## ***G. Nonprofit Advocacy and the Law***

The final structural element to support organizing is clarity around advocacy and the law. Many Community Action agency staff, board, and directors have conflicting or erroneous information about what kinds of advocacy and political activities are and are not allowed by law. In order to proactively address these concerns, ICAA should obtain and share definitive guidelines on nonprofit advocacy and the law in consultation with their corporate counsel, and should share those guidelines broadly as part of the Peer-to-Peer Program, the Grassroots Club materials, and throughout every phase of the advocacy cycle.

### **III. Grassroots Cycle: Planning Phase**

As ICAA is putting the structural elements of the grassroots program into place, they can also be moving through the planning phase of the grassroots cycle.

The planning phase initiates ICAA's annual grassroots advocacy cycle. In this phase, ICAA will work with its member agencies to identify goals, targeting, message development, and possible political activities that ICAA and its member agencies should undertake.

#### *Developing a Workplan*

At the beginning of each cycle, ICAA should develop a workplan that identifies specific goals and activities for a set period. While the advocacy cycle is intended to be year-round in nature, as ICAA moves forward, the cycle may repeat itself more than once in a given year. The elements of the workplan should follow the entire Advocacy Cycle and should include:

- Goals – Grassroots and Policy/Issue
- Message – Internal and External
- Targeting Constituencies
- Targeting Decision-Makers
- Education and Recruitment
- Mobilization Tactics – Legislative and Political Engagement
- Grassroots Activities
- Evaluation

The first four elements – Goals, Message, Targeting Decision-Makers, and Targeting Constituencies – form the foundation for the workplan and will be outlined in this section; the rest follow the Advocacy Cycle and will be outlined in subsequent sections.

## A. Goals

The goals are the primary foundation for the workplan. Each cycle's goals are the basis for everything that takes place during that cycle; the workplan will flow directly from the cycle's goals.

There are two kinds of goals: grassroots goals and policy goals. Grassroots goals relate to ways in which ICAA and its member agencies will build, increase, and demonstrate grassroots power. Policy goals relate to the policy change that ICAA and its member agencies are seeking to influence.

### *Selecting the Policy/Issue Goals*

Some policy issues are more suitable for grassroots activities than others. While ICAA may have a policy agenda that includes multiple issues, another layer of analysis of these issues can help identify which ones best lend themselves to grassroots advocacy. This additional analysis can help ICAA focus on a limited number of issues that they will organize and mobilize around. The remaining non-grassroots issues will be advanced using methods more conducive to the nature of the issue; for example, more technical or administrative rule issues might benefit from direct lobbying.

ICAA should use the following questions to identify the issues that are best suited for grassroots advocacy:

- A. Which issues are easiest to explain, the most free of technical information or jargon?
- B. Which issues carry emotional currency; that is, which ones can everyday people get excited or passionate about?
- C. Are there issues that have broad appeal across ICAA membership?
- D. Are there issues that the national CAP lobbying team has identified as needing grassroots pressure? Are there issues on which the national CAP lobbying team does *not* want grassroots input?
- E. Which issues lend themselves to a variety of mobilization strategies and timelines?
- F. Which issues coincide with other key grassroots organizing, mobilization, or coalition efforts?
- G. Are there issues that are divisive or controversial within the ICAA community that might be better to avoid?

- H. Are there issues that can be good “setups” to build on in the future?
- I. Are there issues that can “win” (defined broadly, with federal, statewide and local conditions in mind) in the short-term?

These guiding questions can be used to winnow down to a manageable set of 1-3 issues around which ICAA can organize and mobilize. Those issues should meet the following criteria:

- Easy to understand and explain
- Ignites passion in advocates
- Does not stir controversy within the ICAA network; appeals across membership
- Builds on, rather than competes with, other lobbying or grassroots issues
- Provides good setups for future efforts; offers opportunities for long and short-term “wins”

#### *Selecting the Grassroots Goals*

Grassroots goals can be set broadly and then broken down agency by agency as needed. For example, a broad grassroots goal could be to increase membership in the grassroots club by 25% over a 3 month period, and then each agency could set a numerical goal for how many new recruits they will get. While grassroots goals will vary from cycle to cycle, but some examples of good grassroots goals include:

- Expanding the grassroots club by x% or by a specific number
- Generating a specific number of letters, personal visits, phone calls, or other contact with decision-making targets
- Training a specific number of new grassroots advocates in basic grassroots advocacy skills
- Training a specific number of seasoned advocates in grassroots leadership
- Increasing the amount of reporting from local agencies to ICAA of “hard numbers” for mobilizations (for example: reporting back within two days of the mobilization on how many people actually made calls/wrote letters/visited with decision-makers)

#### *Defining Victory in the Context of the Goals*

Celebrating victories is critical in grassroots work. Because grassroots advocacy is incremental in nature, it is gratifying to have benchmarks along the way that highlight progress that has been made. Frequent victories help sustain grassroots volunteers, get them excited about future advocacy, and in

some cases attract attention from the public.

The beauty of grassroots goals is that they build in the possibility of multiple victories that staff and volunteers can celebrate. From the very beginning when ICAA starts recruiting volunteers, there are opportunities to celebrate victory.

This is why ICAA should highlight grassroots and policy accomplishments throughout each cycle. For example, developing a strong message, holding a successful training event, creating materials to support the advocacy, recruiting new volunteer advocates, meeting goals for contacting the targets, or gaining media coverage are all cause for celebration.

### ***B. Message Development***

The next element that forms the foundation of the workplan is a solid message to organize around. Message development relates directly to Recommendations One and Two, which talk about defining ICAA and member agencies roles as advocates and service providers. An effective message will help energize and focus both ICAA and its member agencies, and at the same time, will help underscore the fact that ICAA and its member agencies are putting grassroots advocacy and political engagement at the forefront of the organization.

When developing these internal and external messages, it is important to try to use the following measures:

- **Clear** – The message must be written in easily understood words that can be internalized and repeated by the organization and its member agencies. Everyone who talks about ICAA should be able to easily internalize and communicate the message.
- **Concise** – The message should be about 10 words or less, with additional supporting points that can help fill in the details.
- **Compelling** – Grassroots advocacy puts a human face on policy issues, and the message should conjure up the “human” side of the issue. It should not be about programs, but about people – not about economic policy, but about jobs – not about education, but about children.
- **Repeated, Repeated, and Repeated** – This cannot be stressed enough when talking about message. Everyone is going to get sick of repeating this message, but it is necessary for having an effective message.

### *Internal and External Messages*

There are two types of messages that ICAA will need in every grassroots advocacy cycle: Internal and External.

- *Internal Message:* The internal message is the one that will persuade people to get involved in advocacy with ICAA—it is the message advocates will deliver to their colleagues and friends to convince them that they should be advocates. This message should be the mechanism to drive ICAA's educational campaign it should be a tool for "selling" grassroots advocacy and engagement.

In order to develop an effective internal message, ICAA should consider the following criteria:

- Does this message resonate with staff and volunteers?
- Does this message reflect the core values of what the organization stands for?
- Does it include enough "action" orientated language to motivate people?

One example of the message that MCAA has been using to engage and motivate advocates is "You're the *action* in Community Action!"

- *External Message:* The external message is the one that advocates deliver to the targeted decision-makers. It can also be used to educate the general public through the media and other outside communications.

This external message is directly connected to the Mobilization Phase of the workplan. The external message will drive what people are going to be saying to their legislators, what they will write in letters to the editor, and what they will put in a press release.

### *Message Consistency and Evaluation*

Grassroots goal number one addresses the idea of changing the culture of ICAA and its member agencies. Message consistency and repetition will work towards this first goal. If the organization only uses the internal and external messages sporadically, it will prolong the amount of time the organization needs for this cultural change.

It is critical that staff, clients and volunteers as well as people outside the organization, such as policy makers hear a consistent message from both ICAA

and its member agencies. All communications, press related events, letters to the editor, letter, emails, meetings, etc. should reiterate the central external message, as that will help create the impression of an active, unified and mobilized ICAA community. By doing this, ICAA will be working towards the second grassroots goal.

The internal and external messages may or may not vary from cycle to cycle; particularly the internal message should build on itself from one cycle to the next.

### *C. Grassroots Targeting*

The third element that forms the foundation of the workplan is targeting. "Targeting" refers to identifying where and how ICAA resources will be leveraged for grassroots advocacy efforts. Targeting prioritizes the decision-makers who most need to be influenced by grassroots pressure, thus using grassroots resources strategically throughout the advocacy cycle. Targeting will serve as the bedrock for the rest of the workplan, determining the direction and scope of the grassroots organizing activities ICAA will undertake during the rest of the Advocacy Cycle.

In short, targeting allows ICAA to:

- Establish priorities for organizing
- Define levels of intensity of support by geographic area
- Systematically increase volunteer involvement over time

#### *Grassroots Targeting Criteria*

Targeting geographically can help ICAA identify the specific areas in which grassroots advocacy can have the most impact. Rather than spreading its organizing too thinly across the entire state, ICAA can develop a systematic method for determining a level of intensity that can deliver the needed results in each area.

The criteria for traditional lobbying criteria focus on selecting legislators who can have the greatest impact on ICAA's agenda. While this is one element of grassroots targeting, ICAA should also consider the available organizing resources in a district. Therefore, the following guiding questions can assist ICAA in targeting the geographic areas in which they will organize:

- What is the quantity and quality of ICAA organizing resources available in the targeted area?

- Considering availability of ICAA organizing resources, and the legislator's political position (tenure, philosophy, vulnerability of district, etc.) can grassroots advocacy efforts affect the targeted legislator?
- Does the targeted legislator have influence over the issue or their legislative caucus? Can the targeted legislator impact ICAA's issues based on their committee assignment, leadership position, or importance to their caucus?
- Do the districts reflect sufficient diversity to help model what works in which kind of geographical area? (i.e. suburb, city, regional center, rural, etc.)
- Are there partner organizations already organizing or preparing to organize in any districts under consideration? If so, what is the best way to coordinate and maximize organizing efforts?

The geographic areas that ICAA selects for its most intensive efforts should meet a majority of the following criteria:

- There are existing grassroots resources to organize
- The area's legislator(s) can influence the issues
- The district(s) hold a strategic position in the caucus or party
- The combination of districts provide geographic diversity
- The organizing can build on, rather than cause friction with, other efforts where applicable

### *Tiered Targeting*

Because ICAA is a statewide organization, it would be difficult to focus exclusively on a few regions while devoting no time or energy to the rest of the state. Therefore, we suggest that MCCA consider a "tiered" targeting structure that divides the state to reflect ICAA's priorities. This model enables ICAA to provide a basic level of support across the state, while doing more intense organizing in key areas.

For example, ICAA could develop three targeting tiers, with a corresponding level of intensity of organizing in each tier. We provide the following ideas as suggestions to get ICAA started in thinking about how to prioritize and structure targeting tiers; while the exact examples may call for modification, the central theme is that of determining incremental priority areas, and deciding what organizing activities could fall into each level of the targeting tiers.

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## Examples of Targeting Tiers

### *Sample Tier One*

ICAA could consider selecting a limited number of Tier One areas that will receive the highest level of organizing intensity from ICAA. Using the targeting criteria, these should be the most important areas for ICAA, and they should include the areas that ICAA considers their current “strongholds”.

Tier One areas should be those in which, ICAA concentrates the majority of their organizing energy. The idea is to build upon and deepen connections within the area that will serve as bedrocks for expansion into neighboring areas as the network grows.

Goals for Tier One areas would be the most aggressive of the tiers. Some examples could include:

- Number of Grassroots Club Members recruited in a six-month period
- Number of advocates who attend grassroots advocacy training
- Number of personalized contacts made with legislators representing the area
- Establishment and growth of a communication tree (adding a certain number of people to the network per month)

In order to achieve these aggressive goals, organizing support in Tier One would be intense. Each Tier One area could receive:

- Regional Grassroots Training
- Concentrated, one-to-one recruitment to the Grassroots Club
- Assistance in building a communications tree
- ICAA assistance in recruiting participants for training
- Grassroots tools through the web site
- Regular email updates
- Access to web-based leg-finder

### *Sample Tier Two*

Tier Two areas could receive a moderate level of organizing intensity from ICAA. Using the targeting criteria, they should be those areas that ICAA views as the “next in line” for intensive organizing. The goal with Tier Two areas is to provide enough support to keep existing efforts going, and prepare the area for future expansion.

Goals for Tier Two areas should be moderate compared to Tier One areas. They can be the same goals, with less aggressive numbers – for example, if the Tier

One goal is to recruit 50 new Grassroots Club Members in a 6-month period, then Tier Two Goals could be for 25 new Grassroots Club Members in the same period.

Similarly, organizing intensity in Tier Two would be lower than Tier One-- a combination of hands-on organizing and more passive support. Each Tier Two area could receive:

- Regional Grassroots Training
- Monthly recruitment and support contact with advocates
- Grassroots tools through the web site
- Regular email updates
- Access to web-based leg-finder

#### *Sample Tier Three*

Tier Three areas would receive the lowest level of organizing intensity from ICAA. Using the targeting criteria, they could be those areas that are in the beginning or exploratory stages of development. The goal with Tier Three areas is to encourage that exploration without deploying significant organizing resources.

Goals for Tier Three areas should be low as compared to Tiers One and Two. For Example, if the Grassroots Club recruitment goal for Tier One is 50, and Tier Two is 25, then Tier Three could be 10.

In order to achieve this goal, organizing support in Tier Three should be primarily passive. Each Tier Three area could receive:

Grassroots tools through the web site  
Regular email updates  
Access to web-based leg-finder

Not only does this approach focus human capital while continuing to support all ICAA members, but it will also provide a mechanism for moving certain areas along over time. For example, a Tier Three community can be shifted to Tier Two as resources allow, and the organizing intensity in that community will subsequently increase. ICAA can set goals and timelines for moving communities up in the tier structure, thus building a concrete, measurable plan for expansion.

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#### *D. Constituency Targeting*

After grassroots targeting is in place, the workplan must establish Constituency Targets. In addition to concentrating grassroots efforts around a limited number of issues, ICAA can tighten their grassroots focus by examining the audiences they seek to organize and mobilize. Because of limited time, ICAA is challenged to balance the benefit of reaching out to large numbers of people with the degree to which those people are apt to respond to organizing efforts. For example, while ICAA clients surely represent the largest number of potential advocates, they are also likely to be the most difficult group to organize and mobilize.

The first step is to generate a list of all of the potential constituencies that ICAA can mobilize around their issues. This list could include:

- ICAA staff
- ICAA board members
- ICAA advisory board members
- ICAA community partners
- ICAA clients
- Allied organizations
- Coalition partners
- General public

Next, ICAA should consider using the following guiding questions for deciding which constituencies to prioritize or mobilize:

1. Does the constituency have a direct link to ICAA? If so, what is the nature of the connection? How far removed is the constituency from ICAA and its issues?
2. How large is the constituency?
3. Is the constituency already organized along some kind of structure?
4. In general, is the constituency made up of people who are likely to have the time, energy, and inclination to be advocates?
5. To what degree do the targeted issues resonate with the constituency?
6. Does the constituency have the capacity to recruit others?
7. Does the constituency have any previous experience with policy or advocacy?

In selecting target constituencies, ICAA should place a higher priority on organizing and mobilizing constituencies that meet the following criteria:

- Resonate with the targeted issues
- Likely to advocate

- Direct connection to ICAA
- Easy to mobilize
- Already organized along an existing structure
- Able to recruit others
- Some experience or knowledge about policy

### *E. Political Engagement*

A final foundational element of the planning phase looks at what types of political activities ICAA and its member agencies can engage in.

Political engagement refers to those political activities that ICAA and member agencies, as 501C4 organizations are able to pursue. Permitted activities include voter registration, candidate questionnaires, and candidate forums. ICAA should identify how it can effectively use these permitted political activities to further the organization's grassroots advocacy goals.

Every cycle, ICAA should explore the potential for political engagement within the cycle. Considerations for political engagement include:

- **Scope** - How broadly (how much time, energy, focus, staff time) ICAA and its member agencies wants to devote to political engagement in the upcoming cycle. This helps frame the type of activities that ICAA undertakes.
- **Resources** - Where ICAA wants to undertake political engagement activities...statewide, in a few select districts. ICAA may consider setting different levels (tiers) of activities in various districts depending on the resources available.
- **Activities** - Define what activities ICAA and its member agencies can and should undertake.
- **Timeline** - Consider how the timing of political activities might influence the policy and grassroots goals.

Political engagement activities should be integrated into the Grassroots Mobilization phase of the Advocacy Cycle.

#### **IV. Grassroots Cycle: Education and Recruitment Phase**

The education and engagement phase of the advocacy cycle will serve as the connector between the planning and volunteer recruitment/mobilization phase. The first grassroots goal calls for a change in the culture of ICAA and its member agencies. The objective of this phase is to increase awareness and get that all important “buy-in” to the importance of grassroots efforts and to create a sense of “energy” and perhaps even “fun” around the various activities.

Elements of this phase include an internal education campaign, internal campaign toolbox, and the emphasis of an ongoing training program called “train the trainer” that will help expand ICAA’s grassroots capacity. Achieving ICAA’s first grassroots goal depends greatly on this education and engagement phase.

##### **A. Internal Educational Campaign - “Selling” Grassroots**

Restoring advocacy as part of the overall identity and mission of Community Action is one of the challenges that ICAA faces. While advocacy was part of the original mission of Community Action, over the years the network has shifted the balance to a much heavier emphasis on direct service. Honoring the value of direct service while increasing the commitment to advocacy within ICAA’s network is critical to ongoing grassroots success.

In every Advocacy Cycle, grassroots education and “selling” grassroots as an important activity should be a part of the overall recruitment and engagement of grassroots advocates. The internal message for each cycle will be a part of that education, but ICAA should develop materials and activities that demonstrate the importance, appeal, and effectiveness of grassroots advocacy. “Selling” grassroots involvement helps gain organizational “buy in”, continues to strengthen the foundation for cultural change needed to be successful. Some examples include:

##### **B. Internal Education Campaign - Tools**

1. **Talking Points:** A good set of talking points should be the first thing that is developed after the message work is done. Unlike talking points that you would use for your external message, these will reach those already involved in the organizations. These talking points will remain the cornerstone of this educational campaign. If ICAA produces only one thing for this educational campaign it should be these talking points. A set of effective talking points should:

- A. Begin with the internal campaign message

- B. Offer bulleted short statements that build the case for getting involved
  - C. Describe the goals of grassroots organizing for the organization as a whole
  - D. Respond to possible problems people might have such as time commitment, balancing existing work, importance of grassroots advocacy.
  - E. End with a strong call-to-action for ICAA and its local agencies.
2. **Community Action Stories:** ICAA and its member agencies have done so many incredible things for people in Illinois over the years in the way of grassroots advocacy. ICAA should document these stories not only for inspiration and recognition, but to illustrate how grassroots advocacy is already an important element of the organization. By showing people concrete examples of things agencies are already doing that relate to grassroots advocacy it will bring the comfort level up for those who are skeptical.
  3. **Email:** A sample email should be produced by ICAA that each of the executive directors or appropriate representatives could be modified and send to their staff about the importance of grassroots advocacy in the upcoming session and illustrating some of the initial changes that the organization will be making.
  4. **Newsletter Inserts:** ICAA can take the statements from the talking points and put them into several small paragraphs that can be inserted into local agencies newsletters. Having a short article that is already produced will increase chances of it being included. The less work that the agencies have to do, the better.

### **C. Train the Trainer: Developing Grassroots Trainers**

Grassroots organizing and advocacy is only successful if advocates are effective, engaged, and committed. A key strategy in fostering effective advocacy is training. Training helps advocates gain confidence, get excited about advocacy, and involve others as they apply the skills they gain in training. It is both a teaching and recruitment tool. Trained advocates understand the importance of grassroots organizing, know the basic tools of an effective grassroots advocate, and are prepared to mobilize with other advocates around ICAA issues.

Training that is delivered at the local or regional level offers several distinct advantages over an exclusively centralized training program:

- Local and regional training is easier for advocates to attend. Driving time is reduced, hazardous weather is less problematic, and therefore the advocates' ability to fit the training into their workweek is increased.
- Local and regional training gives advocates the opportunity to learn new skills with their peers and colleagues with whom they will be using the skills. This creates cohesion and a team environment that can help bolster advocates when they return home.
- Local and regional training can be customized to suit the unique features and needs of the area.

#### *The Train the Trainer Model*

In order to expand overall capacity of the Community Action network, ICAA must rely on a basic organizing principle: **Force multiplying**. Simply stated, force multiplying leverages existing resources to extend and reach new resources. Rather than having ICAA staff attempt to train all of the advocates in the Association, ICAA can train a few key people, who in turn train more people.

Throughout the ICAA network, there are staff and volunteers at varying degrees of confidence and skill as grassroots advocates. Over time, these advocates will build their skills and experiences as advocates, and are prime resources for mentoring new advocates as they grow. Additionally, ICAA is challenged to create local buy-in on the importance of grassroots advocacy; there is no better way to establish buy-in than by using local staff to convert and train their peers.

For all of these reasons, ICAA should consider structuring their ongoing training program on a Train the Trainer model.

The model consists of the following steps:

- Identify potential Grassroots Trainers
- Train the Grassroots Trainers in both grassroots advocacy and effective training techniques
- Have Grassroots Trainers train their peers and colleagues locally and regionally

### *Advantages of a Train the Trainer Model*

Using a Train the Trainer model offers the following advantages:

- Training provides people with the skills and information they need to be confident, effective grassroots advocates
- The model employs force multiplying to build skills throughout the network, therefore preserving scarce human resources at ICAA
- It provides a mechanism for cultivating leadership and ownership of grassroots activities at the local level
- It offers ICAA a way to capitalize on the range of grassroots expertise, from novice to seasoned advocate, to move people to the next level of grassroots skills
- It can be formulated around a cycle so that skill building coincides with the rest of the grassroots advocacy activities ICAA undertakes, thus, building cohesion around the cycle of grassroots activities
- It creates a systematic method for supporting local advocates; concrete tools accompany the encouragement ICAA gives to local advocates to get involved in advocacy

A Train the Trainer program uses grassroots advocates within the Association to provide training to their peers. This approach creates leadership by cultivating new training skills in seasoned advocates, while mentoring novice or disengaged advocates by leveraging their relationships with their peers and colleagues.

### *Identifying Trainers*

The first step in building a Train the Trainer program is to identify possible trainers. As ICAA begins to identify people who could become Grassroots Trainers within the network, it is important to keep the ICAA clusters in mind. Initially, ICAA should have 6-10 advocates who are Grassroots Trainers. As the Train the Trainer program grows, ICAA should try to recruit new trainers across clusters, so that trainers are spread out throughout the state. In the long term, this will prevent ICAA from having to pull trainers from one cluster to train in another, and will ensure that each cluster feels a sense of ownership and representation in the Train the Trainer program.

Each trainer should have the following basic characteristics to become a trainer:

1. Moderate to high level of experience in advocacy and/or grasp of basic public policy process
2. Moderate to high level of enthusiasm for grassroots advocacy

3. Viewed as a credible source of information by colleagues/peers
4. Absence of major leadership roles in other areas of their organization that might prevent ongoing participation
5. Staff, Board member, volunteer, or client of a local CAP program Comfort speaking in front of groups

### *Setting Expectations*

In recruiting Grassroots Trainers from the initial pool, ICAA should be prepared to outline the time commitment and expectations for anyone interested in becoming a trainer. Some examples include:

- Ability to attend one full-day initial training
- Ability to deliver one 1-2 hour local training and one 2-4 hour regional training in a year
- Ability and willingness to assist with training at the Annual Conference
- Willingness to recruit new trainers into the pool

### *Incentives*

Individuals being recruited to participate in the Train the Trainer program should be offered incentives for becoming Grassroots Trainers. Some incentives are built in: the opportunity for leadership, the development of new skills, and the opportunity to travel within the cluster and be a part of the ICAA's broader strategy for advocacy. These incentives will appeal to those who appreciate public recognition and leadership.

Others may need more tangible incentives, such as merchandise (hats, t-shirts, buttons) or awards. The important thing is to develop multiple ways to encourage, congratulate, and recognize those who participate; so that being a Grassroots Trainer is perceived as an attractive, special, and fun way to be part of ICAA. The incentives can be linked to the Grassroots Club outlined in the Grassroots Cycle: Volunteer Recruitment section of this plan.

### *Training the Trainers*

The second step in creating a Train the Trainer program that both teaches and recruits new advocates is to prepare the Grassroots Trainers to be effective. Advocates who are going to become Grassroots Trainers will need more than technical knowledge about advocacy and political engagement in order to be effective; they will also have to be skilled at delivering training. Therefore, the training of Grassroots Trainers will provide technical knowledge in grassroots advocacy along with skills in effective training delivery. This means that the training must include both the content that Grassroots Trainers are expected to deliver, and also opportunities to develop process

skills so that they are competent and confident in training delivery. The training content for Grassroots Trainers, then, could include:

- The Importance of Grassroots Advocacy
- Defining Grassroots Advocacy
- Advocacy Basics
- Volunteer Recruitment and Retention
- Grassroots Mobilization Tools
- Basic Training Methods
- Training Troubleshooting
- Mock Training Sessions

ICAA should plan a full-day training for Grassroots Trainers from around the state. The Training should be as centrally located as possible; if there are so many Grassroots Trainers that multiple trainings are warranted, they could be located in different areas of the state to alleviate travel problems.

ICAA should convene a follow-up session with all Grassroots Trainers 6-12 months after the program has been launched to provide additional technical assistance, get feedback, and make adjustments to the training as the trainers gain experience in the field.

#### *Local and Regional Training*

The final step in the Train the Trainer program is to have the Grassroots Trainers train others locally and regionally. Grassroots Trainers will be equipped to provide a grassroots advocacy training that includes:

- The Importance of Grassroots Advocacy
- Grassroots Advocacy Tools
- Volunteer Recruitment into the Grassroots Club
- Customized Content as needed

This approach allows ICAA to reach out to more people in their home communities, and gives the organization a chance to formulate the trainings to fit districts in which they are being offered. By personalizing these training opportunities, ICAA will be able to provide customized grassroots organizing assistance that take into account the variation in issues and effective tactics in each unique area of the state. ICAA can also use the traveling trainings to identify new advocates who could be recruited to become Grassroots Trainers.

Local and Regional Training should be delivered in the context of an annual cycle—in the education and volunteer recruitment phase—that corresponds to

ICAA's overall grassroots advocacy efforts. To that end, training will be enhanced each year to account for the accumulation of skills over time.

- *Local Grassroots Training*

Local Training could be 1-2 hours in length, and could be delivered to a local agency's board, staff, and volunteers, with a focus on their agency's issues and their particular district's characteristics. These local trainings could be offered in ICAA's Tier One targeted districts.

- *Regional Grassroots Training*

Regional Training could be offered to several different agencies in a geographic region, possibly including 1-2 legislative districts. It could be offered to ICAA's Tier Two targeted districts.

#### **D. Volunteer Recruitment Opportunities**

At its core, grassroots advocacy is about recruiting volunteers (not legislative or political professionals) to help influence legislative policy. To that end, the education and recruitment phase represents the most critical part of the entire grassroots advocacy cycle. Achieving ICAA's grassroots goals depends on this phase of the advocacy cycle. It is the volunteer recruitment phase that actually enlists people to advocate for ICAA and their member agencies. This phase fills the grassroots infrastructure created during planning, and turns "potential" volunteers into actual grassroots advocates.

There is almost no limit on potential volunteer recruitment opportunities, and ICAA and the local agencies should always be looking for these opportunities. The following are several steps that will help expand grassroots involvement.

1. **Recruitment Contests:** Existing Grassroots Club members could compete (as individuals or agencies) to recruit the most number of new advocates in a set time period.
2. **Mobilizations:** Some advocates may never "join" the Grassroots Club, but might participate in an action by writing a letter or visiting with a legislator. Because ICAA will be tracking advocacy activity, these activists can automatically become members of the Grassroots Club.
3. **Trainings:** The train the trainer program and the creation of a regional training program will allow ICAA to not only educate their members, but also recruit others to be involved in subsequent trainings and other grassroots activities.
4. **Sign-up Sheets:** While having an event or training it is important to capture names of the people attending. These people are going to be

the most likely to give volunteer time to the organization. There should be a box on the sign-up sheet that can be checked if people are interested in volunteering.

5. **Website:** The website should serve as another volunteer recruitment tool. ICAA should have a mechanism to sign people up for the different levels of involvements and also to get additional information on grassroots activities. This option should be located on the home page for ICAA and then also in the “Advocacy Center.”
6. **Events:** There are opportunities to recruit volunteers at both internal and external events. Internal events such as board meetings, parent groups, advisory councils and other activities sponsored by the local ICAA agencies will be the most successful in terms of recruitment. External events in the community that are connected to issues that ICAA and local agencies work on are also good opportunities for finding grassroots volunteers. It is important for ICAA’s representative to get interested peoples contact information or provide them with an information sheet that will steer them towards their local ICAA agency or the websites.
7. **Outside Organizations:** There are a significant number of external organizations that share issues of common interest with ICAA, or are involved in joint ventures with ICAA. These organizations are another potential resource for ICAA and its local agencies grassroots advocacy efforts. By targeting and assessing each of these related organizations, ICAA can maximize on the amount of people that are talking to legislators about ICAA’s issues.

When thinking about volunteer recruitment it is important to not forget those people that have been putting in volunteer hours for the organization already. People like board members, parent helpers, advisory council members, all have made a commitment to the organization already and are likely to increase their efforts if they are shown they are needed. Nothing will increase ICAA’s ability to have a grassroots impact more than effective volunteer recruitment.

## **V. Grassroots Cycle: Volunteer Mobilization**

Legislators are concerned, first and foremost, with their constituents' opinion. That is what makes grassroots advocacy so appealing – if many people in a legislator's district effectively communicate their views on a particular issue, it is likely that the legislator will act in accordance to their wishes.

Included in addition to this plan are three Toolboxes. Each of these Toolboxes are made up of "how to's" that ICAA and its member agencies can use as an easy reference about different grassroots activities and engagement strategies. ICAA is free to share these Toolboxes in their network and beyond; our only request is that the materials be credited to Grassroots Solutions, along with our web address: [www.grassrootssolutions.com](http://www.grassrootssolutions.com).

### **A. Mobilization Goals and Structure**

1. **Culmination of Advocacy Cycle:** The volunteer mobilization phase is the high point of the grassroots advocacy cycle, followed only by volunteer appreciation and evaluation stages before the cycle begins again. Volunteer mobilization is the culmination of all the planning, training, recruitment and engagement work.
2. **Increased Legislative Contact:** Volunteer mobilization involves generating an increased amount of highly personalized grassroots contacts on behalf of ICAA and its member agencies.

### **B. Grassroots Toolbox--Description**

In order to increase the number of legislative contacts, ICAA and its local agencies need to provide their volunteers with the necessary tools to not only feel comfortable with grassroots activities, but to be most effective. The Grassroots Toolbox will provide concrete examples of how to be the most effective grassroots advocate.

### **C. Grassroots Communication Toolbox--Description**

One of the fundamental aspects of grassroots advocacy is to raise public awareness of the issues ICAA is fighting for. While the education campaign that was discussed in the previous section was looking at internal policies, it is also important to any grassroots effort to have public education and awareness as well. The most powerful vehicle to a public awareness campaign is the media.

#### **D. Grassroots Political Engagement Toolbox--Description**

Elected officials worry about getting re-elected. That is why grassroots advocacy is so effective – officials do not want to seem unresponsive to their constituents and voters. However, grassroots advocacy alone is not sufficient to inspire electoral fear if policy-makers do not believe that the issues are politically “powerful.” Unless officials believe the issues are influencing elections, they are less likely to give them their full attention and most active support.

Many state legislators and other policy makers form their positions and priorities on key issues while they are campaigning for office. They focus most on issues that they hear about from voters and issues that register in their polling and focus groups. The issues on which they campaign become their focus issues once elected. It is critically important to make ICAA’s agenda the focus of legislative attention. This process begins well in advance of the legislative session – it starts during the fall elections.

A grassroots infrastructure will mobilize to educate candidates of all political parties on the importance of ICAA’s mission. Through a variety of different techniques, grassroots activists will attempt to gain support for their legislative agendas. These are non-partisan efforts aimed at educating candidates, rather than influencing the elections.

## VI. Grassroots Cycle: Volunteer Recognition and Evaluation

### A. Volunteer Recognition

Volunteer appreciation and recognition is essential to keeping volunteers engaged in grassroots efforts. This holds true regardless of whether the volunteer is part of the staff, on a board, a client, or someone external to the organization. In all cases, ICAA and its member agencies, through as many sources as are appropriate, needs to thank all volunteers, reiterate what their contribution meant to reaching both the policy and grassroots goals.

#### 1. Recognition Opportunities:

- **Thank You Tour:** Following and advocacy cycle, ICAA should conduct a virtual and road “thank you tour” during which agencies receive a “Thank you party in a box” that is either mailed or personally delivered by ICAA staff. The contents could include a summary of the grassroots and issue successes, laminated inspirational quotations, small tokens such as whistles, bells, or buttons, confetti, noisemakers, special awards for particularly active advocates, and evaluation surveys that gather advocates’ feedback on the activities that cycle.
- **Agency Recognition:** ICAA should feature outstanding grassroots activities by particular agencies through emails to the entire network, web site features, and special awards.
- **Personal calls, notes, letters:** Volunteers should receive at least two contacts thanking them for their role from ICAA staff, their Executive Director, or other ICAA leaders.
- **Website:** ICAA should use its website to recognize active volunteers throughout the session as well as throughout the year.

#### *Transition to Education/Engagement*

Just as the evaluation phase transitions back to planning, ICAA can use the appreciation phase to transition back to engaging more people in ICAA’s grassroots activities. Developing some high profile strategies, like the Grassroots Club, to acknowledge the grassroots volunteers serves the dual purpose of earning the appreciation of the volunteers and continuing to increase awareness and importance around grassroots advocacy.

## B. Evaluation

Elevating ICAA's and its local agencies grassroots efforts to the next level is an ambitious undertaking that is likely to involve at least two to three years of intensive organizing. The advocacy cycle recommended for ICAA makes this a year round undertaking, and a crucial part of the cycle is the evaluation phase.

1. **Benefit of Evaluation:** An annual and rigorous evaluation of ICAA's grassroots operation serves two purposes. The first is determining the specific strategies that are effective, areas where adjustments are needed and grassroots techniques that are unsuccessful and require elimination. The second benefit is that the evaluation phase helps connect the end and the beginning of the advocacy cycle.
2. **Transition to Planning:** The evaluation of the previous cycle's efforts should provide a smooth transition into the planning phase for the next advocacy cycle. This connection between each cycle is important, as integrating lessons is essential for building an effective and permanent grassroots operation.

Many grassroots strategies are hit and miss, and many others may be successful one year and less effective the next. Carefully examining what works and what does not will help ICAA establish realistic and achievable grassroots workplans that result in successfully influencing policy.

### *Evaluation Factors*

The Evaluation factors will vary from cycle to cycle, depending on the goals established in the planning phase. However, ICAA will regularly want to examine factors such as:

- ✓ Feedback from advocates as part of Volunteer Appreciation activities
- ✓ Number of reported contacts made in the legislative session
- ✓ Number of people active in the Grassroots Club
- ✓ Number of new people recruited to the Grassroots Club
- ✓ Number of training and Train the Trainer participants
- ✓ Utilization of ICAA's website for grassroots advocacy purposes
- ✓ Number of media hits made by ICAA and local agencies
- ✓ Participation in political engagement activities

## **VII. Conclusion**

Three structural adjustments are critical to expanding ICAA and its member agencies grassroots capabilities:

1. Educating and engaging more people about how important grassroots advocacy is to the organization.
2. Adopting a year round advocacy cycle.
3. Creating a permanent statewide grassroots infrastructure through more aggressive recruitment and support of locally based grassroots volunteers.

Specific grassroots tools can also provide ICAA with new resources, but it is the major structural adjustments that are key to ICAA and its member agencies not only having a successful legislative session this year and the years that follow, but to also creating a sustainable and expandable grassroots operation.

## APPENDIXES

## **Communications and Tracking Components**

These samples give ideas for developing phone scripts, call sheets, tracking forms, and email updates for grassroots efforts.

Sample Recruitment RAP (Phone Script)

Hi \_\_\_\_\_, this is \_\_\_\_\_, the \_\_\_\_\_ over at the Minnesota Community Action Association working along with (name of their agency)!!!  
*If possible, add any relationship connection.*

How are you doing? Great!

*If possible, add a compliment or anything related to recent activity they were involved with.*

**Do you have two minutes? Fantastic.**

Well, I'm giving you a call because the end *may* be near with the Legislative Session and we're pulling out all the stops to make sure Legislators not only hear, but SEE that Community Action supporters like you and I, will hold them accountable for their decisions in the final days.

So we've got a plan! Next Thursday, Community Action staff, board members, and consumers will join 30 other groups at the Capitol to *stand together* as a broad community to be *witnesses for people whose lives will be hurt by the cuts..*

Just like civil rights activists who were trained in civil disobedience, we're gonna make sure Legislators have to look us in the eye when they're making decisions about cutting services to the most vulnerable Minnesotans.

How does that sound to you?

We'll be attending conference committee meetings armed with our protect MEOG stickers! - AND we'll be carrying clipboards to take notes. Our goal is for Legislators to *see* that their constituents are watching them, and holding them accountable.

So, I'm calling to see if we can count on *you* to help make that happen!

(If YES) Fabulous! We're meeting next Thursday a bit before 6:00 over at the AFL-CIO on \_\_\_\_ Aurora, right by the capitol. You should count on being there for about 2 hours. Do you need directions? I'll be excited to see you there!

(If NO) A smaller group of Community Action folks are going to meet at 4:00, can we count on you to make it at 4:00?

(If MAYBE or a soft yes) It would be great if you could help make this happen. If we go away now, we'll be doing exactly what they asked us to do. It's critical that we have a lot of people- how about I put you down as a real strong maybe?  
☺

Sample Recruitment Call Sheet

Agency: \_\_\_\_\_ List Source: \_\_\_\_\_

Call Code Key: LM=Left Message NA=No Answer CB=Call back later C=Connected

---

Date: \_\_\_\_\_

Person Called: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Leg. Target: \_\_\_\_\_

Purpose of Call: \_\_\_\_\_

Call Code: LM NA CB C

Notes/Follow-up Needed: \_\_\_\_\_

---

Date: \_\_\_\_\_

Person Called: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Leg. Target: \_\_\_\_\_

Purpose of Call: \_\_\_\_\_

Call Code: LM NA CB C

Notes/Follow-up Needed: \_\_\_\_\_

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Date: \_\_\_\_\_

Person Called: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Leg. Target: \_\_\_\_\_

Purpose of Call: \_\_\_\_\_

Call Code: LM NA CB C

Notes/Follow-up Needed: \_\_\_\_\_

---

Date: \_\_\_\_\_

Person Called:  
Leg. Target:

Phone Number:

Purpose of Call: \_\_\_\_\_

Call Code: LM    NA    CB    C

Notes/Follow-up Needed: \_\_\_\_\_

*Sample Mobilization Reporting Form*

We need to track phone calls made to legislators so that we can gauge our impact and make strategic decisions about next steps. Please take a moment to tell us about the calls made in your area:

**Name of Legislator #1:** \_\_\_\_\_

1. Total number of calls made:
2. Number of messages left:
3. Number of connects (people talked directly to legislator):
4. Number of calls without connecting or leaving a message:
5. Did the legislator go on record supporting or opposing MEOG?  
(Circle one)

Supporting    Opposing    Undecided    Did not state position

Comments: \_\_\_\_\_  
\_\_\_\_\_

---

**Name of Legislator #2:** \_\_\_\_\_

6. Total number of calls made:
7. Number of messages left:
8. Number of connects (people talked directly to legislator):
9. Number of calls without connecting or leaving a message:
10. Did the legislator go on record supporting or opposing MEOG?  
(Circle one)

Supporting    Opposing    Undecided    Did not state position

Comments: \_\_\_\_\_  
\_\_\_\_\_

## *Sample Grassroots Email Update*

### **Subject: Meeting Resistance**

Dear Community Action PALS,

We are entering the final days of the legislative session and now is the time when many people begin saying “I’ve done my part” or “It’s all over anyway, I give up”.

Luckily for MCAA, you are the *action* in Community Action, and you know that **now is the time to gear up, not give up!**

### **Meeting Resistance**

Some of you have met with resistance with your elected officials. Some legislators counter advocates with erroneous information about the impact of cuts to MEOG; others simply won’t change their minds about cutting MEOG. *What do we do when we face this resistance?*

1. When legislators give erroneous information to counter our position, we must continue to reiterate the real numbers and expose the inaccuracies in their numbers. **If we don't correct them then we pave the way for our defeat.**
2. Our goal isn’t always to persuade someone, but is sometimes just to show them our grassroots “muscle”. We want to make sure that when their colleagues say, "my constituents care about MEOG," they're not able to say, "mine don't." **Our long-term strategy is to demonstrate that we are not going to go away.**

MCAA is continuing to distribute ACCURATE information to legislators about the impact of cuts to MEOG; you can do the same. Sample information is attached; feel free to share it with other grassroots advocates, and encourage them to keep fighting the fight!

### **This Week’s Action**

⇒ Keeping up the Pressure

Marathon runners talk about “hitting the wall” – the pivotal point in the race when they think they can’t go any further. Once they’ve hit the wall and “run through it”, they are able to sustain their pace to the end.

This session is Community Action’s marathon, and some of you may feel that you’ve hit that wall! You can’t quit now, though....the finish line is in sight.

This week, keep planning your letter-raisers; keep making your phone calls; keep correcting misinformation. **We need you now more than ever...you're the *action* in Community Action!**

**Check It Out**

**Don't forget to use the MCAA web site to keep in tune**

**(<http://www.mncaa.org/>)!**

- Check out the **Grassroots Advocacy** Section for tips and tools
- Read about your agency's work in the **Our Members** section
- Get the inside scoop in the special **password-protected PAL section**

User name\*: xxxx

Password\*: xxxx

You're the *action* in Community Action...and together, you're making a difference!

