

COMMUNITY ORGANIZING TOOL KIT

PART A - Introduction

We offer this toolkit as part of our ongoing efforts to provide you with the basic know-how and resources needed to have a greater say in the policies that affect your communities. An initiative of the Office of the Public Advocate's new Community Organizing and Constituent Services Department, this toolkit gives individual New Yorkers and community groups a better understanding of how New York City government works, what you can do to make your government more responsive, and how you can help make this a better city. Central to that process are the organizing efforts of people like you.

The heart of community organizing lies in individuals working together to address issues that affect their daily lives and build community power. At its core, community organizing means:

- 1) the involvement of the community in identifying problems and in the process of solving those problems;
- 2) directly addressing, and when necessary challenging, existing relations of power by those affected by the policies and structures of power.

This toolkit provides an overview of how NYC government works. There are also organizing tools and action steps that individuals and groups can take to advocate for effective policy change while building community power.

This is the first installment of the Organizing Toolkit: much more will be added in the coming months.

Only by amplifying the voices of all New Yorkers and strengthening the work of existing organizing efforts will communities be able to play a more meaningful role in the life of the city. We hope you will use this toolkit to help make that happen.

PART B – The Institutions That Impact Our Lives

Section 1: How the New York City Government Works - An Overview

The government of New York City is responsible for many aspects of life, including public education, libraries, public safety, recreational facilities, sanitation, water supply, and welfare services of 8.3 million New Yorkers. It has the largest municipal budget in the United States amounting to over \$60 billion this fiscal year.

Knowing how the NYC government runs is essential to identify where to address your community's concerns and who has the power to meet your demands. Here is an overview of the functions, powers of elected officials, city agencies and community boards as well as the city's legislative process.

1) Who Represents You

New York City's government is organized under the City Charter - www.nyc.gov/html/charter/downloads/pdf/citycharter2004/pdf - which establishes the Mayor as the chief executive officer and the City Council as the legislative body. It defines the authority of each official or body and the relationships among them. New Yorkers elect the Mayor, Comptroller, Public Advocate, City Council members, Borough Presidents and the District Attorney of each borough. These officials are collectively responsible for overseeing City government directly or through their appointees.

The Mayor is the chief executive officer of the City of New York. The Mayor appoints most heads of City agencies, boards and commissions, at times pursuant to the advice and consent of the City Council. The Mayor is responsible for the effectiveness and integrity of City government operations, proposes the City budget, and has the power to approve or veto all bills proposed by the City Council. The Mayor is elected every four years.

The Public Advocate has a broad oversight role in City government. Advocate can receive, review and address individual, recurring, and citywide complaints on city programs and services and make proposals to improve them. The Public Advocate is the first in line to succeed the Mayor were he or she to leave office. The Public Advocate participates in the discussions of the City Council but is not a voting member, can introduce legislation in the City Council and is an *ex officio* member of all City Council committees. The Public Advocate may also hold public hearings on any of the matters within his jurisdiction and duties. The Public Advocate serves on several committees and boards: the City Audit Committee, the New York City Employee Retirement System, the Independent Budget Office Advisory Board, the Voter Assistance Commission, the Commission on Public Information and Communication, among others. The Public Advocate is elected every four years.

The City Comptroller is the chief fiscal officer of the City. He or she is also the financial advisor to public pension funds. The Comptroller audits City agencies, advises the Mayor and the City Council of the financial condition of the City, and may make recommendations, comments, and criticisms concerning the operations, fiscal policies and financial transactions of the City. The Comptroller also serves on, and appoints members to, several committees and boards: the City Audit Committee, the Independent Budget Office Advisory Committee, the Procurement Policy Board, the Franchise and Concession Review Board, the Office of Payroll Administration, and the New York City Economic

Development Corporation. The City Comptroller is elected every four years.

The City Council is the legislative branch of the NYC government. The Council has the power to propose and adopt local laws, investigate matters related to the property, affairs, and government of the City, and approve the City budget. The Legislative process of the Council is discussed in detail in this document under the heading “Accessing and Pressuring People in Government.” City Council members are elected every four years. Some Council members serve two-year terms for redistricting purposes. This allows for the timely redrawing of Council districts while keeping Council elections on the same four-year cycle as city and borough-wide elections.

The Borough Presidents work with the Mayor and other City officials in the interest of the people of their borough. The Borough Presidents appoint members of the community boards and work to promote the long-term welfare of the boroughs. They can request to have legislation introduced in the Council. To be eligible to serve as Borough President, an individual must be a resident of that borough. The Borough Presidents are elected every four years.

The District Attorneys in each of the boroughs investigate and prosecute criminal conduct in the counties in which they hold office. They are elected to four-year terms.

There are 59 **Community Boards** throughout the five boroughs. Each has 50 non-paid members appointed by the Borough President with input from City Council members. Community Boards advise on land use and zoning issues, community planning, the city's budget process and the coordination of city services to that community. Anyone who lives in the board's area or who has a “business, professional or other significant interest” is eligible to serve on that Community Board. Each board hires a District Manager and other staff.

You can find contact information for all of the people who represent you in the New York City government at: <http://gis.nyc.gov/doitt/nycitymap/> Enter your address and indicate what information you are looking for.

[Adapted from 2009 NYC Voter Assistance Commission,
http://www.nyc.gov/html/vac/downloads/pdf/vac_electeds_guide2009.pdf]

2) How Laws Are Made In NYC

The City Council passes the laws governing the city. Any Council Member, the Mayor and the Public Advocate may file proposed legislation with the Council Speaker's Office. A bill is introduced into the Council during a Stated Meeting (regularly scheduled full Council meetings) and is referred to the appropriate council committees for consideration. Once introduced it is called an *Introduction* ("Intro " or "Int ") and assigned a number.

Any law passed by the Council is subject to compliance with applicable New York State and Federal laws. Essentially, the Council cannot pass a law that goes against New York State or Federal laws, and their legislative authority is limited to the City of New York.

The chair of the committee decides whether to hold a public hearing to take testimony on the issue. If the chair calls for a vote on the measure a majority of the committee members must vote in favor for it to pass. If the chair chooses not to hold a hearing or call a vote, the bill can sit indefinitely with no

action taken. A bill's sponsor may, at least 60 days after the bill's introduction, demand that the chair schedule a committee meeting to consider the bill. The chair must then schedule a meeting within 60 days of the demand. At the meeting the committee may either vote on the bill or schedule a hearing within 30 days. At the hearing, a vote may be taken. If a vote is not taken and the sponsor takes no further action for 45 days, the sponsor may no longer move for the bill's immediate consideration.

The committees of the City Council have public hearings on budget issues, proposed legislation and other items. Anyone can give testimony, although the process for signing up varies from hearing to hearing. Contact the chair of the committee for details: what time limit you might have; do you sign up in advance or when you get to the hearing? If you submit a written statement, make sure to have enough copies for all committee members.

Once a bill passes out of committee, it is sent to the full council for more debate and a final vote. If passed by a majority (at least 26 of the 51 members), the bill is sent to the mayor who can then sign or veto it. If the mayor signs the bill, it immediately becomes a local law and is entered into the City's Charter or Administrative Code. The time until a new law becomes effective will vary. If the mayor vetoes the bill, he or she must return it to the City Clerk with objections, and it goes back to the Council by their next Stated meeting. The City Council has 30 days to override the mayoral veto by a two-thirds majority (at least 34 members). In this event, the bill becomes a local law. If the mayor does not sign or veto a bill within 30 days after receiving it from the Council, it is considered approved.

Resources for more information:

(1) The City Council's web site: <http://council.nyc.gov/html/about/legislative.shtml>

(2) Gotham Gazette's City Government, *How a Bill Becomes a Law*:
<http://www.gothamgazette.com/city/bill.php>

3) City Agencies, Departments And Commissions

There are 100 agencies, departments and commissions that are part of the government of New York City. You can find a complete list on the NYC website - <http://www.nyc.gov>

The Mayor appoints the individuals in charge of for the agencies, departments and commissions. Some appointments have to be approved by the City Council. You can check the agency or department website to get those details, or you can ask your City Council member to get the information for you.

Oversight of these agencies rests primarily in the hands of the Public Advocate. However, the City Council also has some oversight authority, and the City's fiscal oversight is primarily the responsibility of the Comptroller. It is the Public Advocate's responsibility to monitor the delivery of services, address complaints from the public and help resolve outstanding problems. The Public Advocate is the watchdog for the people of NYC to help ensure the City is meeting the needs of its people. This work is done partly by the independent research of the Public Advocate's office and partly because New Yorkers raise their concerns. In other words, oversight is the work of all of the people of the City.

In the coming months we will be adding information about the New York City budget process, as well as land use and zoning issues and other items.

Section 2: Other Local Institutions And Centers Of Power

Many of the issues your community faces can be addressed by NYC government entities and structures. However, local government cannot always address your concerns. You should identify the local institutions that have an impact on your community and might have an important role to play in dealing with issues and problems.

There are many such institutions throughout the five boroughs. Some of these are citywide while others are community-specific: neighborhood businesses, large corporations, major non-profit organizations and religious institutions.

While privately owned businesses, corporations, non-profit organizations and religious institutions are subject to the laws and regulations that apply to their activities they usually can modify their own policies and actions without going through the same process as government agencies. They have their own, internal process to adhere to, but some of the approaches and tactics for pressuring government can be useful when applied to these entities as well.

The local supermarket can be targeted to enforce eco-friendly measures to reduce the waste of produce or limit the use of plastic bags. Local businesses and corporations can be held accountable for engaging in predatory or discriminatory practices that adversely effect community members and consumers.

Likewise, major non-profit institutions are centers of power within the community, oftentimes with a strong constituency or following. There are different kinds of non-profit institutions including, but not limited to, colleges and universities, hospitals and other health related organizations, charitable organizations, direct service and advocacy as well as a range of community groups.

Local institutions do not always have the power to make the decisions or put into place the changes your group is seeking. But they may be in a position to influence those with that power and as such you will want to explore the possibilities for generating their support or active participation in your efforts.

Religious institutions often play a powerful role in the life of a community, and in some areas there may be several different religious institutions. Because a person's relationship to his or her religious institution is very personal and often a very strong bond, you need to build connections with members of a given congregation before moving ahead on any campaign that is challenging that religious center. Having an inside connection can prove pivotal to the success of your undertaking.

You should also think of the religious institutions in your community as a potential base of support. The question then is how to best enlist the active involvement of these institutions.

Section 3: Making Your Voice Heard

Because NYC is so large and its governance structures so complex, making sure your voice is heard might seem like an insurmountable challenge - but it is **not** out of reach.

There are several things to consider:

- What concern or issue do you want to be heard on?
- Which part of the government or non-government institution has something to do with your concern?
- Do you want to be heard as an individual or as part of a larger group or organization?
- Is there some urgency to your concern, or is this something that can be addressed over time?

There are at least 2 resources that can help you figure out which City entity you need to deal with:

1. 311 is New York City's web site and phone number for information and non-emergency services. Anyone can dial 311 or access the website at <http://www.nyc.gov/apps/311/> and you should be able to get quick access to all of the NYC government services and other information. You can also report problems and request services. This service is especially useful if your problem is not too complex and can be quickly resolved.
2. There is a great deal of information on the website of the NYC government including a comprehensive list of the 100 city departments, agencies and other offices: <http://www.nyc.gov> There is a brief description of each agency and you can link to the department or agency you want to learn more about.

1) Accessing and Pressuring People In Government

City Council - <http://council.nyc.gov>

There are 51 members of New York City Council, all elected by the voters of the districts they represent. Each council member has at least one office in their district and an office at 250 Broadway, across from City Hall. The Stated Meetings of the Council (meetings of the full Council) are held two times a month at City Hall. Council meetings and committee hearings are held in City Hall. Members of the City Council sit on at least 3 of the standing committees, sub-committees, select committees and panels. These committees convene the initial discussions about proposed legislation and get input from the public and other parts of the government.

The full Council elects its Speaker and then elects the members of the Committee on Rules, Privileges and Elections. This committee recommends which Council members will serve on the various committees, and the full Council approves these recommendations. The full Council elects the chairs of standing committees. Council Members all serve on several of the 37 committees and sub-committees. The committees may have regular meetings and also hold public hearings on pending legislation. These hearings are an important opportunity for your voice to be heard! The website of the City Council has a list of Council members with links to their websites, as well as a list of the Council committees and who serves on them.

City Wide Elected Officials

Mayor - <http://www.nyc.gov>

Public Advocate - <http://pubadvocate.nyc.gov>

Comptroller - <http://www.comptroller.nyc.gov>

Making sure any of these citywide officials hears you means using a variety of ways to deliver the message. Calling, faxing, emailing and writing to their offices are all vehicles you should use. But don't stop there. Ask your City Council member to help deliver your message. Make your message public by sending it to media outlets. When appropriate, organize a public activity – vigil or rally, for instance – in front of City Hall or the Municipal Building. Be creative, and if it's important that they hear your message do not give up!

2) Others To Contact

Borough Presidents

Through the NYC website (<http://www.nyc.gov>) you can access the websites of each of the 5 Borough Presidents, which in turn gives you their contact information.

Community Boards

The 59 Community Boards around NYC each have their own offices. For details about the Community Board in your neighborhood, go to: <http://www.nyc.gov/html/cau/html/cb/main.shtml>

Each Community Board meets once each month. These meetings are open to the public with a portion of the meeting reserved to hear from members of the public. Boards conduct public hearings on a range of issues, giving the people of the community the opportunity to express their opinions. The Community Boards also have committees where work on the specific issues takes place. Each Community Board sets up its committees and the procedures it wants to use, but throughout the city people who are not members of the Community Board can apply to join on a committee.

City Agencies, Departments and Commissions

There are 100 different agencies, departments and commissions that all play a role in the life of New York City, which can be found at:

<http://www.nyc.gov/portal/site/nycgov/menuitem.92ac74f3d803f4fd6bce0ed101c789a0/>

Each agency, department and commission has its own office - sometimes more than one - with varying levels of staffing and organizational complexity. You will need to do some research to learn more about the specific agency you want to contact. For example, who heads the agency or department, do they convene public hearings, what are the best ways to make your voice heard? Regardless of the size or complexity of the agency, department or commission, they all are public institutions and you should not be shy about contacting or pressuring them when necessary.

3) Non-Governmental Institutions In Your Community

It's not possible to list all of the institutions and organizations in NYC. You will have to do research to get the information you'll need. It's always good to try to locate the name of a specific person: the Executive Director or President, the Community Liaison officer, etc. Even if you do not personally know this person it is better to make contact with a person and not to an anonymous institution.

4) Deciding What Tools to Use

Here are several things to consider when deciding how to raise your issue:

1. Do you want to be heard as an individual, or as a group?
2. Is it important that you get a response, or are you mostly interested in delivering a message?
3. Are there timing concerns? Does the issue you want to raise require immediate attention or is it acceptable if it takes longer to get a response?
4. Have you or someone else from your group already tried to make contact with the elected official or agency, and if so, have you had a response?
5. Are you able to successfully use the tool (see below) to deliver your message?
6. Can using this tool help lay the groundwork for using other tools as your effort unfolds?
7. Is this tool something that others can also use, or will it require training or assistance to the people who want to be involved?
8. Do you have a follow up plan, which might include using another tool?

5) Specific Tools

Here is a quick overview of some of the tools you can use to make your voice heard, either as an individual or as a group. These are not listed in priority or order of importance. They can all be useful and effective, and in many circumstances the best approach involves using more than one.

- testify at public hearings or committee meetings.
- make an appointment to meet with your elected representatives or the head of an agency.
- written communication:
 - letters – individually written letters carry the most weight
 - postcards
 - faxes
 - email
- delivery of signed petitions.
- day (or days) of phoning the appropriate office.
- public activities: vigils, pickets, marches, rallies, nonviolent civil disobedience, street theater and other types of public events.
- media work:
 - letters to the editor
 - guest editorials and/or opinion pieces
 - coverage of an event or activity of your group

PART C – ORGANIZING FOR CHANGE

Section 1: Power in Numbers: Strengthening and Building Community Groups

1) Is there a group already working on your issue or in your community that you can join?

Before starting a new group see what's already out there. New York City has hundreds of community-based organizations that are working on many issues. There are groups focused on the needs of specific neighborhoods, groups that address particular issues, groups that work throughout a borough or citywide. Some groups exist for a short time and dissolve once their goal is achieved. Other groups will work for years to deal with the concerns, issues and problems that come up in the life of their community.

If you already know about a group that is working on your issue, check them out. They might have a website which can tell you a lot about what they do and how they do it. You can always call and speak to someone, and if the group has an office you can probably make an appointment to discuss things in person.

If you do decide to form a new group, here are some things you should consider to get started.

2) Forming a New Group

The first step is to pull together a few people who share your interest in forming a new group. Most likely this will be people you already know, and some of them might bring others into the discussion.

a) What Type of Group Do You Want?

There are many variations on what your group could look like. Answering these questions will help you decide what type of group to build:

- Is the goal to work on a specific issue or concern, with an understanding that once that concern is dealt with the group will dissolve?
- Is the goal to form a more permanent group, one that will focus on a specific issue over time but might also take on new issues as they develop and the group grows?
- Do you want a neighborhood group, or a group that covers a larger geographic area?
- Are you, or others, able to give the new group a great deal of time and energy, or is this a project you'll be fitting in around other commitments?
- Have you already talked to people about starting this group, are there people you are planning to talk to?

b) What Do You Want Your New Group to Look Like?

Here are the major things you need to decide:

a) constituency of group

- neighborhood group focusing on a specific issue or set of issues
- neighborhood group working with a specific constituency
- neighborhood group open to everyone that will address a range of issues
- borough-wide or city-wide group focusing on a specific issue
- borough-wide or city-wide group working with a specific constituency

b) nature of the work the group does

- press for changes in policies and practices
- educational
- advocacy
- research

c) structure of the group

- all volunteer
- small paid staff, mostly volunteer
- mostly staff
- type of leadership/decision-making body

You are now ready to make a decision about the type of group you want to build.

Section 2: Getting Started

1) Finding the people

You and a few others have decided to form a new group. You have a sense of what you want to work on and have made decisions about the nature of the group you want to form. Now what?

Expand the organizing group

The first step: connect with people you already know. If five of you are starting this group you probably each know one other person who might be interested in joining. If that's true you have immediately doubled your size! There might be many more people your initial core group can reach. The main thing is to not be shy: everyone should make a list of who they know who might be interested in joining and decide on a time frame for contacting them.

Invite others to join

There are many times when just a few people can get a whole lot accomplished. But let's assume the work you've identified for your group will take time and will need the active participation of many people. Here are a few things you can do to invite others to join:

- plan a get-together or meeting in a location that's easy for people to get to
- post notices about the meeting on public bulletin boards in community centers, religious institutions, laundromats, and other places
- send notices to community media outlets
- hand out leaflets announcing the meeting in locations with lots people – for instance, if your group is focusing on education issues hand out leaflets at the local schools when parents drop off or pick up their kids.

Important detail: it is helpful to ask people to let you know in advance if they'll be attending the meeting. Is there a phone number they can call or an email address they can send a note to?

2) The first public event

You want all of the activities of your group to go well, but there is something special about the very first open meeting or get-together. You want people to come, and once there you want them to have a positive experience and make the decision to join your group.

Think through what you want to happen at this first meeting:

- greet people
- introduce the core group that convened the gathering
- have everyone who attends introduce themselves
- explain why you are forming this group, the nature of the problem you want to address, the need for this constituency to come together and how you see this group working
- explain what activities you hope people will be involved with

You might want to have a guest speaker or show a short film. If you do, leave plenty of time for the other items you also want to cover as.

Some practical items to consider:

- have the event in a location that is easy for people to get to and find
- make sure the room is comfortable – heated in winter, air conditioned in summer
- do you want to serve some food or refreshments?
- be sure to end the meeting at the time you told people it would be over!
- have enough copies of any materials you want to hand out to people:
 - agenda for the meeting
 - overview of why you are forming this new group
 - ideas for how people can be involved
 - sign in sheet
 - notice of the next activity or meeting

Soon after the meeting the core group should review how things went:

- was the turn out what you had expected or hoped for?
- were people enthusiastic and interested enough to come to the next meeting or activity?
- did people sign up for committees or activities you are planning?
- were you able to do everything you had planned to at this initial gathering?
- was there anything you should have done differently?

3) Keeping people involved

Perhaps the single most important thing you can do to help ensure that people will stay involved is this one simple task – call them! There is nothing as good as direct contact with people. Talking with people in person is always great, but the phone is the next best thing.

It is very important to call the people who attended, especially anyone who signed up for a task or a committee. Tell them how much you appreciated their participation, and make sure they know what comes next. Encourage them to ask any questions or raise concerns or new ideas they might have. In other words, don't just tell them the time and place of the next meeting – have a conversation.

Central to keeping people involved is having real activities they can participate in and real tasks they can take up. Most people have other demands on their time and energy: family, work, school and/or involvement with other organizations. If someone has shown an interest in your group you need to have specific and concrete ways for them to be part of the effort.

These can be very simple tasks:

- making calls or handing out leaflets announcing an activity of the group
- asking local stores to hang a poster from the group
- entering names into your data base
- working on a mailing

Or tasks can be more complex, requiring more time or skill:

- calling other volunteers to sign them up for tasks
- working on the logistical details for the next public activity
- taking charge of a specific committee or group
- coordinating the work of a group of volunteers

The challenge is finding the right balance between engaging people and not overwhelming them;

giving people assignments they can handle and making sure they are not bored; and asking people to try new things while making sure they can handle the tasks they take on.

Most people want to be involved in helping to decide what the work is. They want to help shape the decisions of the group: what positions the group takes, the organizing priorities, the specific activities being planned, and other items.

Some people will come to your group with experience and expertise and will be able to jump right into a decision-making role. Others will need to be taught how to do this type of work. Everyone's involvement is important so you'll need to figure out how to work with them all.

Section 3: Developing and Running Campaigns

Most of your issues are not going to be resolved overnight, or even in a week or two. The problems your community faces are often complex, have long histories and/or are the results of dynamics that reach beyond your immediate area. Seriously dealing with an issue requires detailed planning. A campaign needs to be designed that can meet your goals and achieve a victory, ideally several victories along the way.

1) Responding to the moment, planning for the next steps

There are occasions when issues are so pressing, or your group needs to respond to an emergency, that there is not time to plan out the details of a campaign. Even in these moments it is helpful to use the analysis and strategy your group has developed as the basis of your efforts. Unless the issue that has come up is so major that it calls your analysis and strategy into question, it makes sense to ground your work – even your emergency projects – in the longer-term perspective your group has agreed on.

If you need to act quickly, it's valuable to reflect on the work you did after it's completed. This can be helpful as you think about the next steps in this work.

As your ongoing campaign develops be sure to look back at the work your group has already done:

- have you learned new things about the issue and how to work on it
- see if there were mistakes to avoid in the future
- try to understand if your emergency efforts might have benefited from being part of your ongoing campaigns, and if so, how could that have happened

There are other situations where there's not an emergency but there is some problem that your group cannot avoid, something that cries out for attention and action. For instance, your group is working on tenants' rights, but the city has just announced it plans to cut the funding for a local childcare center.

2) Defining your issue

An effective campaign has several parts. The very first thing you need to do is decide the issue your campaign will focus on. Your group might have come together to focus on a specific issue or problem, so deciding what your campaign will focus on should be a lot easier. But remember: naming an issue is different than defining the details a campaign.

If you have already decided on the issue your campaign will focus on, skip to the next section on developing your campaign.

If your group is still thinking about what issue to focus on, there are several things to keep in mind. This checklist is drawn from *Organizing for Social Change* published by the Midwest Academy < www.midwestacademy.com/midwest-academy-manual >.

If you meet most of these criteria then you've probably selected a good issue to work on:

1. The work your group does on this issue can **lead to a concrete improvement in people's lives.**

2. The people who are involved in this work can come out of the experience with **greater confidence in their own power**, knowing their involvement made a positive difference.
3. Through the work you do on this issue you will begin to **alter the relations of power**. In part this happens because during the course of your work you have been building your own group and that becomes a new center of power in and of itself.
4. The **people involved feel they are fighting “the good fight”**, that they are involved in something that is worthwhile, important, righteous, etc.
5. **The issue should be one that many people feel is important**. This wider group of people should also agree with your goal, the solution you are working for. Additionally, **people should feel strongly** about this issue – strongly enough that they will give their time and energy to the effort.
6. It helps if the issue is **easy to understand**. In the best situation you will not have to convince people that this is a real problem and that your solution makes sense. Even better is when people want to help out by joining your efforts. Sometimes things are not so obvious and some explaining is needed.
7. You know you have a good issue to work on when it’s **clear who your target is** – who can give you what you want or make the changes that are needed. Some issues have more than one target and this will require a more complex campaign plan and long-range strategy.
8. It’s best to decide on an issue that **does not divide** your group, or people in your community. An issue that has broad support is going to be easier to work on. Beyond the immediate work your group does, will working on this issue help bring in more people who in turn will be involved in the ongoing campaigns of your group?
9. Finally, and critically important, the issues you work on, the solutions you are seeking and the ways your group works should all **be grounded in and reflecting the values and vision of your group**.

3) Developing the details of your campaign

With their permission, we are again drawing heavily from *Organizing for Social Change* by the Midwest Academy < www.midwestacademy.com/midwest-academy-manual >.

Planning your campaign means giving thought to and mapping out details in at least six categories:

1. The goals of the campaign: long-term, intermediate and short-term.
2. The people who will be involved, as well as allies and opponents.
3. The targets you will be focused on – who can respond to your concerns with concrete action.
4. Which tactics you will want to use.
5. How this campaign will impact your ongoing organization concerns.
6. Putting all the pieces together into an overall time line for the campaign.

a. Goals of the campaign

There's no point in initiating a campaign if you don't have a goal in mind. Achieving your goal could take some time so it will be helpful to have smaller goals that you want to achieve as stepping-stones or building blocks along the way.

Start by identifying your long-term goal. Then figure out what victories you need to secure to get to that long-term goal. These are your intermediate goals. The third step is to set short-term or immediate goals. These should be easier to win and will help engage people in the overall campaign.

A short-term goal can be something like getting a meeting with your City Council member or getting an announcement in your community paper about an upcoming event. The point is that as a group you have set these goals, worked on securing them and then benefited from your success.

As important as it is to have goals for your campaign it is also very important to be able to re-define these goals as your work unfolds. In the efforts to secure the short-term goals you might learn something new that could impact on your intermediate goals. Similarly, your long-term goals might have to change as you gather the experience of the group's work on the short-term and intermediate goals. In other words: set goals, review how the work is going, and be open to making adjustments in your next level of goals should that be necessary.

One tool that many groups find helpful when setting goals is called SMART, which stands for:

- Specific - concrete, detailed, well defined
- Measureable - numbers, quantity, comparison
- Achievable - feasible, actionable
- Realistic - considering resources
- Time-Bound - a defined time line

b. People who will be involved

If your group has agreed to take up a campaign you should be able to draw at least the core group of people who will work on it from the ranks of your membership. If that can't happen you might want to re-think this campaign!

You also want to reach people outside your core group. Think about who might be interested in this issue and your work on it:

- why do they care about this issue?
- what could they gain if this campaign is successful?
- what power – especially in relation to this issue – do they have?

Once you have identified a broader constituency for this campaign you need to figure out how you are going to reach them and bring them into the effort:

- are they in groups or other institutions?
- are you going to have to reach people individually?
- are there media outlets you can access or other ways to reach people?

Be as specific as possible when answering these questions. The information you put together will help you figure out how to get people engaged and what tactics you will want to use.

There are two other categories of people to consider:

Allies. Individuals and organizations that might be supportive but not fully involved in your campaign. The more specific you are about how they can be supportive the greater the chance they will be. Offer concrete ideas for what they might do and stay away from broad, open-ended requests for help.

Opponents. These are the people, groups and institutions that will be upset if you achieve your goals. If you know why they might oppose you – what’s at stake for them – you might be able to imagine actions they might take. Being prepared for reactions to your campaign can help you decide which tactics to use and how to keep moving forward.

c. Target to focus on

When planning your goals also think about who has the power to make the decisions needed to secure those goals. Usually you will be up against an institution: a government agency or department, a private corporation, or a non-profit agency. Sometimes you might be dealing with more than one institution.

Keep in mind that institutions are not abstractions. Institutions are comprised of people, and within each there are decision makers and people in charge. While it can be valuable to point out the institutional forces that need to be challenged, your campaign will be more effective if you are clear about which specific people you are focusing on.

- Who is in charge?
- Are there others this person is responsibly to and/or other people they will be inclined to respond to?
- How can you approach this person? What steps need to be taken before making direct contact with this person?
- What types of pressure do you think this person will be most responsive to?

There may also be people you want to designate as secondary targets. These are people who do not have as much power as the primary target but are able to influence your primary target and/or are people you can more easily connect with. Not every campaign will have both secondary and primary targets, but every campaign needs to have a target.

One more thing about targets: These are people. It is by virtue of the role they play within a given institution – and the power they have to make decisions – that makes them a target. Because they are people they also have a range of responses, values they want to live up to and alliances with others that are important to them. The more you can find out about the person the more likely you will be able to use tactics that can help move this person to make the decisions you are working for.

d. Tactics to use

Tactics are the tools used to give life to your strategy: the activities, actions, events and everything else you use to call attention to your goals, attract people to your work, and/or apply pressure where and when needed.

Your tactics should be consistent with the values and visions of your organization, but aside from that

there is really no inherently good or bad tactic. The question is which tactics will help advance your campaign? One tactic might make sense at the beginning of a campaign but be less useful down the road, and adversely, one tactic might make good sense later in a campaign but not be good early on.

It's great when you can develop a schedule for using tactics that build on one another. Even if that's not possible you should always be looking for tactics that people can relate to and that attract attention as well as inviting participation.

Here are several questions to consider when deciding which tactics to use and when to use them:

- Will this tactic help focus greater attention to the issue and to your campaign?
- Will using this tactic help other people better understand what you are working on and what you want to achieve?
- Are there tactics you've used before that have worked and what can you learn from the tactics you've used that did not work?
- What new and creative ideas can you come up with?
- Does this tactic help you direct attention to your target(s)? If not, is there some other reason to use this tactic?
- Do you have the resources necessary to effectively use this tactic? People power, money, time, etc.
- Are the people involved in this campaign prepared to take this step and be part of this tactic? Will people enjoy participating in this and will using this tactic help attract new people to your campaign?
- How will using this tactic help build your group?

e. Organizational concerns

You need to take stock of what resources your group has available to put into this campaign, what resources you do not currently have but need to secure in order to carry out the campaign and what you would like to get out of the campaign in terms of building your group.

Examples of resources you might have or you need to secure include:

- salaries for staff, if needed
- volunteer people power
- space to work from
- phones and internet access
- copying/printing
- spaces for public meetings and events
- money to pay for some of these items, and other expenses that might come up

As you identify the resources that are needed to carry out the campaign you will quickly see what you already have and what's still needed. Having a plan for putting together those resources is essential.

You also should do an assessment of what your group or organization hopes to get out of the work it will take to carry out this campaign. For instance:

- Can you attract new people to the ongoing work of your group?
- Will working on this campaign give your group greater visibility and more power in your community or citywide?
- If you're successful in this campaign will it open doors to other work you want to do? And if you are not successful will that set back your other efforts?
- Will it be possible to raise new money for this campaign or will the general funds of your group be spent? Will it be possible to use the campaign and the activities of the campaign to raise money?
- Will your group's current staff and/or volunteers be totally consumed by work on this campaign? And if they are, will your group still get enough out of the campaign to justify this use of staff and volunteer time?

f. Time line

A valuable tool in planning your campaign is a time line. Time lines can cover your work for the coming week, for a month, for the next six months or year – whatever length of time you want. You should consider making several different time lines:

- one for the whole campaign
- one for achieving your intermediary goals
- as many as you'll need to carry out your short-term goals and even some of the specific projects or activities within a short-term goal

The point is to give your group a road map of how you plan to get from here to there: the specific steps you need to take, and in what order they need to be taken. As each step is placed on a time line – including who is responsible for those steps – you begin to see how the pieces fit together. And you see where things are not fitting, where something is missing or where something needs to be adjusted.

Having a written time line can help your whole group stay on track. Everyone can see what should be happening along the way and when things look like they are falling behind. That's the time for an evaluation of how the campaign is unfolding, and the time to see if any adjustments need to be made in the campaign generally or in any of the details of the campaign.

4) Keeping your campaign on track

Having a well thought out plan for your campaign does not necessarily mean everything will unfold as you hoped it would. That's the reality when dealing with people: what you thought would play out in a certain way doesn't; new ideas as well as new problems come up; your actions set off responses that you had not anticipated; and much more.

The challenge is to stay focused and not get thrown off course. There's nothing wrong with re-working

your plans when that's necessary, but that shouldn't mean you have to change the issue you are working on or alter your long-range goals. The point is to stay grounded in what brought you to the decision to begin this campaign in the first place and make any adjustments from that same starting point.

Even if there are no obvious problems forcing you to re-think the details of your campaign it makes sense to periodically conduct an evaluation to make sure things are moving in the direction you want. Here are some things you will want to look at:

- 1) Are the goals of the campaign still relevant?
 - Have conditions changed since you set the goals of your campaign?
 - Has new information surfaced that might change your goals?
 - Has something new emerged which might be a more pressing or urgent goal?

- 2) Are you sticking to your campaign plan?
 - Is the work moving along in accordance with the time line you developed?
 - Are deadlines being met? If not, is this a frequent problem?
 - Have you been able to use the tactics you wanted to, and build the alliances you hoped to? If not, why not?

- 3) Are the resources you need for this campaign coming together?
 - Are the resources you have available adequate for the tasks?
 - Do you need resources that you had not anticipated or thought about before?
 - Do you need more time to get the resources you need? Or do you think it's not going to be possible to get the resources you had hoped for?

- 4) Can you measure the progress you are making?
 - As you developed your campaign plans did you build in ways and times to measure your progress? If not, you might want to add those.
 - Have you won, or come closer to winning, any of the short-term goals?
 - Have you been able to build your organization in any measurable way?

From time to time you will want to make an assessment of how the campaign is proceeding. There's no need to do this too frequently: if your campaign is supposed to run for 6 months you should probably do a review 3 months into the work; if it's a year long campaign you might want to do a review once every 4 months. Give yourself enough time to have done a significant piece of the work, and enough time to make any adjustments that are necessary.

Section 4: Outreach

When community organizers say “outreach” they usually mean efforts to bring their message to new people and to bring new people into their activities and organization. It’s an imprecise word for critically important work.

Organizing is, at its core, about working with people. As organizers we believe that change is possible and – most importantly – that when people are informed, motivated, inspired and equipped with the necessary tools they can be the active agents of making that change. With this as our foundation, we quickly come to the question of how we connect with people. And that’s what outreach is all about. It might be better to call it reaching out and not outreach. Whatever we call it, there are some basics that need you need to keep in mind.

1) Why do outreach?

There are several reasons for making outreach plans, and in many instances these reasons are complimentary:

1. You want people in your community to know about and participate in a specific event or activity you are planning.
2. You are trying to get more people from your community involved in the overall campaign or project you are working on, not just a single activity.
3. You want people in your community who do not already know about your group to learn about it, and to get involved with you in an ongoing way.
4. For each of the three categories above, you can also be thinking about doing outreach to people beyond your community.

2) Who are you reaching out to?

Deciding whom you want to reach out to is shaped by what you are inviting them to do, how you hope to engage them in your work and how you have answered the questions above.

It might be best to connect with people in a limited geographic area, or within a specific constituency. For instance, if you are trying to protect a local community garden the first group of people you want to reach are those living on the blocks closest to the garden. If you’re fighting for a new playground for the kids throughout your neighborhood you will want to reach people in a larger geographic area.

The answer to this question – who are you trying to reach out to – is very seldom “everyone.” That’s just too big a category and unless you have tremendous resources it’s not realistic. It’s important to be as specific as possible.

Make a list of:

- groups you think would respond positively to your contact

- groups you might not be sure will respond positively but you want them to know about your group and your activities even if they don't participate now
- locations where people you think will be interested already gather
- key people whose name might help you contact others

Don't forget the power in the personal contacts that people in your group already have. If people call their own friends, neighbors, co-workers, people they go to school with or attend religious institutions with, etc. collectively you will be reaching out to many, many people.

3) Outreach Tools

The decision about which tools to use for your outreach needs to be made based on who you want to reach, what your time frame is and how many people will be doing this work. If you think you want to reach people by running an ad on TV – certainly one way to reach people – you need to have the money to produce the ad and buy the TV time! In other words, make plans that match your capacity as well as your outreach goals.

a) Speak to people directly!

- knock on doors
- call people on the phone
- call contacts you have with other groups, organizations and institutions
- make announcements at the events and activities of other groups – with their permission, of course!
- set up literature tables in busy locations

b) Distribute written notices, flyers or leaflets

- hand them out where people congregate or pass by in large numbers – subway stations, super markets, movie theaters, etc.
- give them out at events or activities where the people attending might be interested in your work
- leave them in community centers, bookstores, laundromats or other places people gather
- post them in places you can legally do so: bulletin boards in community centers, religious institutions and schools; in store windows; in the community rooms of large apartment buildings - make sure you have permission to post them!
- put them under the doors of your neighbors

c) New technologies

- send notices to every appropriate email list that's appropriate to use for the activity you want to attract people to
- make the information prominent on your own website and ask other groups to post it on their websites
- if you can produce a short video and post it on YouTube you should widely distribute the link
- make sure the members of your group use any of the social networks they are part of – FaceBook, My Space, etc. – and make sure people who Twitter are using that to get the message out

d) Mailings

- In this age of electronic communication sending something the old fashioned way might actually catch someone's attention. Be sure to leave enough time to handle the mechanics of doing the

mailing and getting it delivered to folks. And make sure you have the money needed to cover the postage and copying costs.

e) Visibility items

- While you can't get as many words onto a sticker, button or tee-shirt that you can on a leaflet, you can send a clear and strong message without spending too much money
 - stickers are cheaper to print and easy to get up – but be sure they go in places they are legally allowed to go!
 - buttons are more durable but cost more to produce
 - tee-shirts are especially good in warmer weather and are best when they are produced early enough to have a long shelf life

f) Media

- do your best to get free media – commonly known as “earned media”
 - send out press advisories and press releases
 - organize a press conference or other event aimed at getting media attention
 - send letters to the editor
 - have people call into radio talk shows
 - try to have an opinion piece or guest editorial printed
 - send the information to the “community calendar” or “bulletin board” listings at many media outlets
- if you have the resources, purchase media
 - ads in print outlets
 - radio ads
 - TV ads

4) Making an outreach plan

Your outreach plans should be part of, and integrated into, your overall campaign plans. It's not enough to say that outreach will be a part of your work. You need a plan for how you will do that outreach.

Some things to consider when figuring out your outreach plans:

- what kinds of people are interested in the issue you're working on?
- given the event or activity you are inviting them to, who do you think are the people most likely to be interested in participating?
- are the people you want to reach in a group, organization, or other social entity - or will you mostly be trying to reach individuals?
- what is your goal for the number of people you want to reach - how many people you would like at your event and how many people you think you need to tell about the event in order to reach your turnout goal
- do you have enough people to carry out the outreach work you want to do?

As you make your plan, think about which outreach tools you can use, and how to put several of them together as an outreach package. It's good to have clear priorities for your outreach: which things are must-do's, and which are the outreach tools that you would like to use if you can.

Finally, don't be afraid to try something new!