Section 4:
Group Development and Generic Agenda Items

Communication and Education

Meetings are a great forum where you can communicate to the members of the group, and they can communicate to you. At some point, you'll want to let members know about what's happening in the advocacy and political community. You'll also want to collect information from your group on important issues related to poverty in your community.

When you're doing so, make sure that you're **always speaking in an accessible and engaging manner**. This does not mean dumb things down; try to explain complex topics in accessible language. For example, at one meeting I tried to explain the budget reconciliation process, which is complicated, detailed and can involve lots of legislative jargon. It wasn't worth explaining everything about it. I tried to use only the jargon that was absolutely necessary, and defined these terms when it was appropriate. And I explained what the process meant mostly in terms of its impact, which everybody seemed to understand.

Legislative updates

One of the most important things you may do is brief your advocates on relevant political news. The update should provide mostly background information on an advocacy activity that you'd like to engage your volunteers in. Again, make sure that you're explaining things in a way that anybody can understand. And don't overwhelm people with too much information, or irrelevant information. Providing a supplemental handout with more information can be helpful, which you can develop on your own or take from another organization (See materials and resource list). The Center on Budget and Policy Priorities, for example, provides lots of informational notices that you can turn into legislative updates.

Advocacy Alerts

At every meeting, you're going to want to urge group members to take action. Explain the intended impact of the action, and provide relevant background information, which can be done in a Legislative Update. And if you want to, talk about how the action fits into the big picture of a broader goal or campaign. Your volunteers will probably want to know what the intended effect of the action will be.

Make it easy for your volunteers to participate. Give them lots of guidance and support; you can write out how to contact the public officials in question, what to say, and why you are saying it (see example at the end of this section). Another way to make sure volunteers are engaging is to make contact with a public official at the meeting. Bring cell phones to call them, computers to send them emails, or postcards or letters to fill out at your meeting.

To find out about advocacy opportunities, you could subscribe to an advocacy alert newsletter. Look for local or national organizations that provide these alerts. You may want to monitor governmental websites or sign up for a newsletter from a public official for more information. If you're in Oregon, make sure to sign up for Oregon Food Bank's Advocacy Alert, and sign up to receive other messages about advocacy opportunities.

Educational Presentation and Skills Training

Early on, you may want to teach group members some things about the issues you'll be involved in. Everybody ought to have some baseline knowledge about how government works and what's happening with the governmental programs that you'll be paying attention to.

Later, you may want to build each member's advocacy skills. It may be helpful to first have a discussion about what people would like to learn. You may find that you're unable to teach them what they'd like to learn, in which case it may be a good idea to consider attending or holding an advocacy skills conference. If you know anyone who can run a training or educational session, consider inviting them for a group training.

Understanding poverty in your community

You may also want to facilitate discussions about the problems volunteers face as people living in poverty. By having these discussions, you may find out about new issues for your organization to advocate on. It can also help your organization focus the advocacy it's already doing on issues that are more important to your community. Some organizations find this information out through focus groups, or a citizen's advisory board. Your group can fill these roles instead.

After having a discussion like this, you should take advantage of the access you have to important stakeholders. In discussing the problems they see in their communities, your volunteers may let you know about problems with government programs, with other service providers, or just in the community. **You can bring this information to the attention of relevant stakeholders, so that they can take action**. Not only does doing so improve your community, but it may build better relationships between you, your volunteers, and other stakeholders.

For Materials Related to Legislative Updates and Advocacy Alerts:

OMB Watch. A Washington think tank and advocacy group that monitors the federal budget and promotes nonprofit advocacy. www.ombwatch.org.

Center on Budget and Policy Priorities. A Washington DC think tank that provides great information on state and federal poverty issues and strategies for successful advocacy. www.cbpp.org.

Food Resource Action Center. A Washington DC think tank that provides information on state and federal anti-hunger issues. www.frac.org.

Oregon Food Bank. Sign up for the Oregon Food Bank's Advocacy Alert, which distributes lots of information on advocacy opportunities. **www.oregonfoodbank.org**

Oregon Center for Public Policy. An Oregon think tank that provides great information on policies that affect vulnerable people. It provides policy updates if you sign up for its alerts. www.ocpp.org

SAMPLE HANDOUT FOR

ADVOCACY ALERT/LEGISLATIVE UPDATE

Reconciliation Explainer & Action Guide

What is budget reconciliation? What's been happening in Congress for the last couple of weeks is a process called **budget reconciliation**, which is how Congress makes some budgetary changes to entitlement programs. An entitlement program is one that **distributes goods and services based on eligibility** (as opposed to a discretionary program, which distributes goods and services based on funding). The main way to change how much money an entitlement program spends is to **change the eligibility rules**. This year, budget reconciliation is in part dealing with three entitlement programs: Food Stamps, Medicaid, and welfare (TANF). The House and Senate have passed different versions of this year's reconciliation bill, and a Congressional committee is hammering out the differences between the bills right now.

How does it affect Food Stamps? The House's version of the reconciliation bill **eliminates categorical eligibility** (or cat el, as some call it), which makes it easy for some people who use social services to get food stamps. The bill would also require that **citizen immigrants be in the country for seven years before they can get food stamps**- up from 5 years. According to the Oregon Center for Public Policy, these changes would make **35,000 Oregonians lose their Food Stamp benefits**. The Senate version of this same bill does not contain any Food Stamp cuts.

And Medicaid? The **House** reconciliation bill lets states ask for **a higher contribution from Medicaid (OHP) recipients to participate in the program**. This is will most likely **cut vulnerable people off of the program**, since many people can't afford these contributions no matter how much they need services. Oregon showed that much in 2003, when it raised OHP premiums, and people in need dropped off OHP. The federal government is basically letting all states do just that. In addition, the bill would let states reduce benefits if they want. Add it all up, and under these cuts, about **25,000 Oregonians would lose health care coverage, and many might lose some benefits,** depending on what the state government decides to do**.** Again, the Senate version doesn't contain changes that would make people drop off the program- it in fact would expand Medicaid to cover more disabled children.

And Welfare? The issues around welfare are a little different. Congress has to **reauthorize** most federal programs, which means it changes a few parts of a program here and there, and then votes on it. The federal government's welfare program- TANF, or Temporary Assistance for Needy Families- was supposed be reauthorized in 2002, but Congress didn't really want to talk about it. Now, Congress still doesn't want to talk about it, but it has to reauthorize it SOMETIME. So at the last minute, **the House slipped TANF (welfare) reauthorization into the reconciliation process, too**. They put it into the really big bill with Medicaid and Food Stamps, which would make it hard to vote against. And only a small committee really gets to debate and discuss what's in it- it was never brought to the floor of the House for discussion, and it wasn't even in the Senate version. Of course, the House's reauthorization is pretty bad**- it makes work requirements stricter and reduces benefits that help welfare recipients get by on their own, like child care benefits**. What many people are asking for, as a first step, **is that Congress take reauthorization out of the reconciliation process**, give everyone a chance to debate and discuss it, and let everybody vote on it as a single bill. Some people think that it even violates Congressional rules to include welfare in reconciliation. We may soon see a ruling on this issue from the Congressional parliamentarian, who decides if something the Senate does breaks parliamentary rules.

<u>So what's going to happen now?</u> Both the House and Senate versions are going into a committee, where about 10 representatives from each chamber iron out the differences between these bills. The committee produces a new bill that both bodies have to approve before it's sent to the President for his signature. Fortunately, **Sen. Gordon Smith has publicly stated that he opposes the House's cuts** and will vote against any bill that contains these cuts. The other important fact is that the **House version passed by the slimmest of margins- 2 votes**. Only one Oregonian representative voted **for** the House version: **Rep. Greg Walden.** However, most analysts think our best chance to defeat the cuts is with Sen. Smith in the Senate.

And since the House and Senate passed their respective versions before the Thanksgiving recess, moderates in both bodies have been **making a lot of noise about how they don't like these cuts**. Gordon Smith, as I said before, has been among the **7 Senate republican's who signed a letter that states their opposition to cuts**…and a similar letter is now circulating in the House. Also, today the Senate overwhelmingly passed three motions to instruct, which are basically public statements that the Senate votes on to send a bill conference committee some message. This time, all of the motions said no to cuts.

SO really, **the Senate is where the best chance is to stop these cuts**. It's really unbelievable. Senate moderates seem to taking a strong stand on this very important issue, at a time when a whole lot of the most vulnerable people in America, like Katrina victims, aren't doing well at all, to put it mildly.

<u>So what's the Food Bank been doing to make sure that these cuts don't pass?</u> Well, the Food Bank's advocates are trying to get as many people as possible to send thank you notes to Senator Smith for standing up for Oregon by facing down his party's leadership so far, which is not the easiest thing to do. **He's the most important Oregonian representative on this issue, and we've been focusing on him**. But we're also sending thank you letters to congressional democrats. Everybody who's helping is going to know how important what they're doing is. And they're going to know that a lot of people are paying attention to what they're saying now, and will be paying attention when they vote on the final bill.

!!ACTION!!

Call your Congressional Representative!

Most Oregonian representatives have said they will vote against the cuts. We should be letting all Oregonian representatives know that we support that decision, and that we're paying attention!

However, Rep. Greg Walden and Sen. Gordon Smith are the most important Oregonian representatives on this issue. We should focus our efforts on calling them. If you know anyone who lives in Rep. Walden's district, have them call his office!

Call the Capitol Switchboard toll free at **1-888-233-1221** and ask for your Member's office. Let them know that they should stand up for good values and good people by voting against any bill that contains cuts.

Building a strong group identity

Building a group identity is more art than science. Simply being together over and over again can create a sense of shared identity among members. The relationships that volunteers create with each other also add to a group's identity. The following are some techniques that can speed up the process of forming a group identity.

Presenting your organization's vision

At your first meeting, you present your vision for the group. You'll want to address the same questions you did when you came up with the plan: What does your organization expect of the group? Who will decide what's on the agenda? Who will decide what the group engages in? What issues are your organization's highest priorities for the group?

You should let people know if you don't quite know the answers to these questions. It's helpful to give everyone some idea of what your hopes are, even if it means letting them know that you don't know what those hopes are yet. **And make sure to open the floor for questions after you've presented your vision.**

Getting Feedback

Try to get feedback on your vision for the group. I found that for the first three meetings, the group didn't know exactly what to think about our vision. This may have been due to my confusion about what the group's goals were. But it also may have happened because we did not have a facilitated conversation, complete with a question and answer session, on our group's identity at our first meeting. It turned out that people wanted to discuss the mission, goals, and structure of the committee. At our third meeting, we decided to discuss the group vision. We may not have been ready to decide exactly what our group mission would be, but having a discussion greatly helped us on our way to forming a better group identity.

The I / We Divide

One of the greatest challenges for any facilitator is to get everyone to identify with the goals of the group. Many advocates may come to your group to fight a personal battle. For example, they were mistreated by the state human services agency and want to either get the treatment they think they deserve or only want to change that agency. These people are difficult to work with in a group setting, because they tend to only answer to themselves, and not to the group.

Education is one way to encourage members to identify with your group's causes. Most of the issues that you'll be interested in are consequences or causes of poverty. If you take a look at the bigger picture, almost all issues related to poverty have some impact on each other. If you have more food stamps, for example, you may have more money for housing. Or if you get health care coverage, you can heat your house. Or if you better jobs were available, all those problems would vanish. The members of the group may already understand the connections between different conditions that are at root caused by poverty. It's your job then to show that since almost any issue can have some relevance, it should be alright to do advocacy on more issues than they just the ones they find personally compelling.

Through education, you can also show a volunteer that advocacy is not just about them- it's about their entire community. Explain the structural causes of poverty. Show them that usually, what happened to one person is a part of a larger pattern involving many other people. A personal grievance may have been caused by an institutional policy. Therefore, they ought to think about changing the policy, not just fixing their situation.

You might also let them know that they represent all the people who've had bad things happen to them, some of whom aren't able to advocate. Many people share the same problems as the members of your organization. Many of these people don't have the time, money, or opportunity to do advocacy. Recognizing that you're helping lots of people can inspire volunteers to think about other people's interests, not just their own.

Individual follow-up

Besides groups discussions, another great way to get feedback is to privately follow up with a volunteer after a meeting. Following up is also helpful when you want to get feedback on specific aspects of your meetings, and not just its goals or priorities. You can call or email, but the best way to do it is to meet in person. Try to begin a follow up session informally. Ask them about how they're doing, and other social things. Part of following up is to try to build a relationship with the volunteer, which will make both yours and their experience richer.

Bring a list of questions that you'd like to ask them, and try to record their answers. Ask them what they'd like to see happen in the next meeting, and how the last meeting went. Try to include any suggestions they might have your next meeting's agenda. The follow-up shouldn't be for show only- it's important that they see results.

You should be aware that doing effective follow-up can require a significant time commitment. You may find that some volunteers will want to talk to you longer than your schedule may allow. Once you have a good relationship with a volunteer, a simple follow-up conversation can run 2 hours. You might want to limit your conversations to an hour or less, and hold yourself to it.

Building strong group structures

As your group grows, you should consider fostering the development of more group structures. You'll want to communicate with volunteers often, and they may want to communicate with each other. You'll also want to begin handing over some responsibilities to group members. Formal structures help you do these things.

Group Communication Structure

Face-to-face contact is always the best way to communicate. But between meetings, consistent communication among you and the group will mostly occur through email and over the phone. Setting up a group **listserv** is free and doesn't take very long (on google.com, or yahoo.com). Another way to communicate over email is to keep a group **email distribution list** to send out reminders and advocacy opportunities to people when they come your way. In any case, make sure to keep **a database of everyone's email, phone number, and address,** if possible. Some volunteers won't have regular access to email or even phone, so conventional mail will be your best bet. You might want to have a conversation with your volunteers on how to best facilitate group communication.

The more people you know, the stronger your network should be. Add anyone who's shown interest in your group to the group database- they may not come to meetings, but they could help in an advocacy event. When you want people to take action, you may find that have an extensive database will help you find people better than a smaller database of advocates who participate more often.

Codifying Group Identity

As the last section explained, the group should feel like it's involved in issues it cares about. This may be a challenge, since members may have varying or conflicting opinions on what the group should be working on. Everybody will have their issue- welfare, health care, food stamps, jobs, etc. Not everybody is going to want the group to put effort into every issue.

If you're unable to achieve a strong sense of common identity and interest in too many members, it may be best to try to juggle many issues and campaigns at the same time. Try to include opportunities to advocate on a variety of causes at each meeting. At our first meetings, we covered many topics to get more people interested. Most people found something they were interested in.

On the other hand, if you are able to achieve a strong sense of group identity, **you might consider drafting and adopting a mission statement** that codifies the group's identity. Now, you don't need to initiate the process of creating a mission statement in your first meetings. The CAN, for example, did not develop sufficiently to draft a mission statement in its first three meetings. Try not to draft a mission statement prematurely. If your group isn't very cohesive, it can be counterproductive to write a mission statement, as it can take a while to write one that everyone agrees on.

Establishing a Group Decision-Making Process

Most likely, the issue of who controls the group is a concern of the volunteers. Does the group feel like it has some control over its direction? Is it included in the decision-making process? Are its needs being heard and addressed? In your first few meetings, the group should have some informal control over the agenda, through things like feedback discussions and individual feedback sessions. You'll probably have compromised on your vision for the group, as you should. If the volunteers feel that they're doing something they don't like, they probably won't come back.

If volunteers want more control over the group, though, **you may need formal structures that facilitate collective decisions-making, help resolve conflicts, and distribute responsibilities**. Sometimes, this means electing officers, a board, subcommittees, or a leadership team that could take care of some of your responsibilities. At a group's inception, these processes may be unnecessary and counterproductive, since you'll be making most decisions, and the group may not be cohesive enough to make these decisions quickly. When the group develops sufficiently, you may want to consult a guide on creating a leadership structure. See the Rural Organizing Project's guide to naming leaders at the end of this section.

Choosing Group Priorities

Once you've created a group decision-making process, and formed a coherent group identity, it will be much easier to choose which priorities will form the basis of the advocacy activities your group engages in. At first, these priorities will mostly be a product of what your organization is doing at the time. For example, the first advocacy activities the CAN participated in were related to a campaign that Oregon Food Bank had gotten underway long before the CAN formed. It's important to get your group involved in these advocacy activities, as advocacy actions can be exciting and rewarding. Further down the road, the group may want to decide for itself which issues they'd like to help with.

Courtesy of the Rural Organizing Project

Named Leadership Teams

Background: The Rural Organizing Project exists to develop and support vibrant social justice groups in rural Oregon. In the first 10 years we have learned a lot on what allows a group to thrive and what allows a group to fade away! Three components seem basic to any group having staying power: 1. a named leadership team, 2. a plan of action, and 3. a regularly used communication system for both supporters and the broader community. This memo looks at what it means to have a functional, named leadership team.

What: A named leadership team might best describe a 'Board'. It should be a group of 7-15 people that each commit to a specified period of stewardship for the organization. This working group makes routine decisions and sets directions for the organization.

Why: Regardless of what you call it (Board, Steering Committee, Leadership Team), a named leadership team is needed to provide structure. Without structure a group can complete nice isolated projects, but sustaining an ongoing presence that can impact community culture is hard without basic structure. Having the leadership be named allows those names to be made public which makes the group accessible to potential supporters and people in need. It also allows the group to have a decision making process. And, it helps define for members what is expected of them so that they are better able to contribute to the work of the group.

Who: It is important that the right people are on a leadership team. There are many perspectives on who is 'right' for the job. Here are some screening approaches that the ROP uses. Does the person share the values of the group? Does the person function well in meetings? Some people hate meetings despite their dedication to the group, other people enjoy meetings; the leadership team needs folks that can cope in a meeting setting. Can the person make a time commitment? (If the person is wearing too many other hats, this might not be the best time for them to take a turn on the leadership team.) Is the person willing to make decisions? Is the person willing to cooperate? Do they have the specific skills needed for the role they are being asked to play?

How: Once you find that it makes sense to have a leadership team, it is important to define what they (board members) would do. Consider writing job descriptions for the various roles, as you would in hiring someone for a job. These can be simple, but should clearly state what is expected of each member, so they can decide if they're up to the task. You might want to define the length of term for the position and include recruiting new leadership in the responsibilities of each person.

The next question is how do you find these folks when everyone seems so busy? Rule number one – don't beg. Take the time to have enough conversations to find the folks where this commitment matches where they are in their lives. Many other folks might be honored to be considered but need to be supported in understanding what the job would require and being honest if it fits in with their current life. People who decline now might be able to start making the space for a future year's turn at leadership. Start by brainstorming a list of prospects. Divide the list of prospects up and set up formal times to meet with these people and discuss the group, its history, its potential and what it would mean to commit to being on a leadership team. Enter into the one on one meetings with a friendly timeline to allow for them to happen. It would be good to have a first meeting date set for folks who say 'yes' to plan around. Following up with a letter of confirmation as a reminder of the meeting helps.

- Brainstorm names of prospects
- Divide who will meet with which prospect
- Conduct meetings
- Host meeting with new recruits who sign on

When: Many groups go through cycles of ebbing and flowing – being more active and less so. When a group is struggling to establish directions, complete projects or get critical mass to a meeting (or even to have a meeting!), it is a good time to consider beefing up your leadership team.

For more support in getting a leadership team operational in your community contact the ROP: POB 1350, Scappoose, OR 97056, office@rop.org, 503 543-8417

ROP Organizing Tips

Making the most of your e-mail communication

E-mail has become one of the main ways we communicate with each other and with our members. Therefore we need to think strategically about how we use email as an organizing tool. The goal is to have messages read and used. (As opposed to sending the most messages on the broadest variety of topics!) The effectiveness of email in our organizing relies on leaders committed to building a reputation for short, relevant, and focused posts.

Tips for all e-mail communication

- *Think about the subject line*. Is it catchy? Descriptive? Personal? Leaving out the subject line or using a generic heading like "hello" or "how are you?" may make your reader think the message is spam or a virus and delete the message without reading it. A boring subject line like "next meeting," or "funds needed" will only attract your most dedicated readers. Use something that will draw people in, like "Local victory for farmworker rights!" "Flakes for Peace" or "Tracking YOUR Wal-Mart."
- *Make it short. (But not too short.)* Anything longer than one screen worth of text is probably too long for a message that goes out to a broad audience. But, don't be so brief that your message is cryptic, or that only an insider will know what you're talking about. Write your message so that the least informed person on your list will understand what you are saying or asking.
- *Be human.* Use warmth, personality, and your own colloquial style to make messages appealing and to help build relationships. E-mail can be very cold, impersonal. Write like you're talking to someone you care about, and your readers will respond. At ROP we call it being "chatty."
- *Choose carefully.* Everyone is overloaded with information these days. Forwarding too many messages or bombarding people with information is likely to lead to your messages getting deleted.
- *Forward with care.* If you have something you need to forward, delete the Fwd: from the subject line, and cut and paste the text into a new message, so your reader doesn't have to look past all the hash marks to read the subject. Delete any unnecessary info, especially other people's names or e-mail addresses. Try to put it into context: "Below you will find important information because…"

Personalized e-mail

- Best option to use when you need a direct answer to a specific question or you want someone to do something.
- Good for recruiting volunteers. Asking someone directly for his or her help is much more effective than sending a message out to your whole list saying, "I need help." It's too easy for everyone to assume that someone else will step up.

- Use for turnout. In addition to more broad methods, such as announcements to your listserve and in the local paper, consider sending personal invitations to everyone on your list. You can use the same message for many people by cutting and pasting core text; just take the time to write a personal hello and greeting.
- Good for reminding volunteers about commitments.
- More time consuming, but also more effective.

Internal list. This is a clear list of leaders vs. everyone connected to your organization.

- Good for committees, leadership teams.
- Allows for private, internal conversations.
- Helpful for internal business that may not be interesting or relevant to your larger base of supporters.

Organizational listserve. This is a list of your group's members and supporters that you use to share key information about the group's activities.

- Messages should be limited to information specific to the mission and purpose of the group.
- Each message should reflect your group's perspective, priorities. See it as the public voice of your organization, like a newsletter.
- Limited to no more than a few messages per week or a short weekly digest.
- Needs a volunteer or a small team to post to group, review suggested messages (a moderator).
- Messages should be edited for length, relevance and clarity.
- Assume that most, but not all, people who get the messages will be familiar with your group. If you're being effective, your messages will get forwarded. Make sure your organization's contact info is on all the messages, with information on how to subscribe.
- Unlike a discussion listserve, only selected members can post to the list. This keeps there from being too many messages and from becoming somebody's soapbox.

Discussion listserve. This is the broadest group. Geared toward those seeking information to develop their analysis and with enough time to keep up with a larger number of messages.

- Great tool for sharing information and/or articles broadly.
- Good for discussion/debate.
- Democratic forum, chance for everyone to be heard.
- Can easily become a forum for the most vocal.
- Debates can turn to arguments and turn off listeners.
- Easy to spread rumors, hard to ensure accuracy of sources.
- Unmoderated list can easily get nasty; readers subject to personal attacks and debates
- Guidelines can be helpful in reminding people what is appropriate for the list
- Best to have a moderator, though this can be a time-consuming job.