

Base Building 201: Mobilization [Program]

Trainer Names:

Learning Objectives:

Skills, Knowledge, and Attitude which learners should take away from this session.

- Understand the different levels of involvement members of their base will have
- Be familiar with common tactics for outreach (phone banking, canvassing/tabling, group raps)

Achievement Objectives:

Tangible steps learners will take to advance real or simulated campaign work.

- Practice effective outreach via canvassing, phone banking, and group presentations
- Use the Rule of Halves to plan out an effective mobilization

Time: 120 min

Normal = say out loud

Underlined = flipchart this!

Italics = trainer notes/instructions

Bold = key point

Anchor: The ANCHOR step invites learners to reflect on past experiences which relate to the learning of the session. (e.g. “Think back to a time when _____. What did that feel like?”)

1. Mobilize Your Participants! [5 min]

Show participants what it means to mobilize by mobilizing them! Start your mobilization effort over meal time, before this training. Pick 5-10 participants and pitch them a cool idea for how we’ll start the training that day. The idea is that everyone will gather in the middle of the room and start chanting, “I believe that we will win!” over and over again, getting louder and more animated.

Trainers should ask these participants to spread the word by telling at least five other people during meal time. Make sure to get a firm commitment.

At the end of meal time, two Trainers will start things off by assembling the chosen participants and the people they recruited in the center of the room. Starting the chanting! Other trainers will join as well and grab participants on the way. This continues until the room is full of the whole group chanting, and cheering, and jumping up and down. Let the chanting continue until vibes run out, then get everyone prepared to start the next training.

Today, we're going to talk about mobilization. You may already have figured it out, but you were all just mobilized to take action. *Ask: why did you decide to join the rally that we just had?*

Some suggested answers include:

- *Everyone else was a part of it*
- *Someone asked me to join*
- *Someone asked me to organize it*

Add: The ADD step introduces new information and tools for learners to consider.

1. Defining Mobilization [2 minutes]

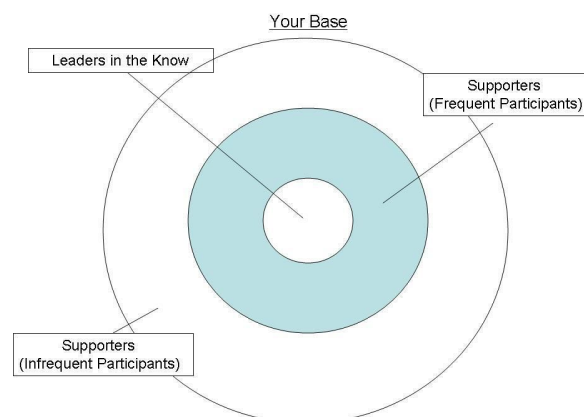
What is **mobilization**? Mobilization is the act of turning out large numbers of people to take a coordinated, strategic action.

- Some examples of mobilization include:
 - In-person mobilization for rallies, meetings, town halls, kickoff meetings, and key events
 - Visibility mobilization such as asking many people to wear the same button
 - Online mobilization; such as changing your Facebook profile picture

2. Understanding Your Base [8 min]

Mobilization is about turning out all the members of your base. Can someone remind us what a base is? *Answer: a base is a large group of supporters who can be called on to take action for your cause.*

Different people in your base have different levels of involvement and access to information. When we mobilized a little while ago, our base was in the same space and all knew one another. On a real life campaign, this is likely not the case. You can conceptualize the different levels of involvement in your base by thinking outward from the leaders. Flipchart image of a target like below:



The **leaders in the know** are those intimately connected to the campaign and to each other. This is likely a group of 10-20 people. These people should be the ones mobilizing others!

The **frequent participants** are those you can count on to attend meetings and take part in important tactics when asked. How do you think you can mobilize these participants? *Frequent participants can be mobilized through word of mouth through connections they have in the group. You can ask these participants to take on larger leadership roles to enter the inner circle of the group.*

The **infrequent participants** are those who may privately supportive of your organization. It is important to continue to ask these folks to take action with you, particularly when you have a critical tactic that really requires lots of participation. How do you think you can mobilize these participants? *Infrequent participants can be mobilized through canvassing, tabling, and online communication. They likely don't have the connections to the group in order to hear about it by word of mouth.*

3. Outreach Tactics for Mobilization [15 minutes]

So how do you mobilize both frequent and infrequent participants while best utilizing your resources? Generally speaking, good mobilization involves asking people as many times and in as many ways as possible to take an action. You can do this both through direct and indirect outreach:

Indirect Outreach is one sided communication that gets the word out about an action without the possibility of dialogue or making an ask for commitment.

- Examples of indirect outreach tactics:
 - Flyers
 - Email Listserv
 - Facebook posts or tweets
 - Facebook event invitations
 - Opinions piece online or in the newspaper

Direct Outreach is outreach from one person to another which ends in an ask for a commitment. A commitment is a direct ask for involvement: “Can you commit to attending our rally on May 4th?”

- Examples of direct outreach tactics
 - Phone banking
 - Canvassing
 - Tabling

Direct outreach is particularly important because it is much more likely to get definite commitments than indirect outreach. Let's talk a little bit more about these strategies. *Trainers can flip-chart this entire chart or the first two columns.*

Tactic	Materials Needed	Overview of Strategy
Tabling	<ul style="list-style-type: none"> ● Sign-up sheets ● Elevator pitch ● Clipboard and pens ● Factsheets/flyers 	Tabling is a strategy where volunteers stand with clip boards in front of a table with campaign information. Volunteers give an elevator pitch to get commitments from people

		who stop to listen.
Canvassing	<ul style="list-style-type: none"> • Sign-up sheets • Elevator pitch • Clipboard and pens • Factsheets/flyers 	Canvassing is a strategy where volunteers go around to different houses or dorms. They give an elevator pitch to people who answer the door to get commitments to attend an event, sign a petition, etc.
Class or Group Presentation	<ul style="list-style-type: none"> • Elevator pitch • Sign-up sheets 	Group talks allow you to reach a huge group. Bring sign up sheet to get written commitments!
Phone-Banking	<ul style="list-style-type: none"> • Phone script • Call lists 	Phone banking is when you call people on your phone list to ask them to make a commitment. You can't get a written commitment, but make sure to get a verbal commitment.

Apply: The APPLY step invites learners to utilize the new information in a task, challenge, or focused conversation. (e.g. practice, application, case studies, compare, etc.)

1. Practice Stations [60 min]

You will need additional trainers to help facilitate this section. For each station, at least one trainer should guide participants through the exercise. Participants will rotate through three stations to try their hand at different types of direct mobilization. At the beginning of the each station, the trainer(s) leading the activity should brief participants on that method of outreach and give them a scenario to practice.

This activity will help you practice your direct recruitment skills. Doing grassroots outreach isn't hard, but it can be nerve-racking. We're going to break you into three groups and each will start at one of our three different stations. *Describe where each station is and which trainer(s) will be running each station.* You will have twenty minutes at each station to observe, practice, and give and receive feedback. Each station is structured somewhat differently, so the trainer at that station will explain in more detail once you get there.

Break the group into three smaller groups. Have one trainer on point to keep time and oversee rotations. Each station lasts 20 minutes, but trainers should leave five minutes to debrief at the end of each group's time at their station.

A. Canvassing Station

Scenario: You're asking folks in your neighborhood to sign a postcard to the mayor, asking her to adopt green-building standards, upgrade efficiency in existing buildings, and convert the municipal fleet over to biodiesel.

Directions: Break the group into smaller groups of two to four people. Have the trainer stand behind a door and ask one group at a time to come knock on the door. Trainers can play a particularly challenging character, but don't be unrealistic. It might also be helpful to have other trainers make an appearance as family members or act as pets. Have other groups observe and give feedback.

Key lessons:

- Learn how to walk away and cut your losses
- Always stay professional and polite regardless of reception
- Read your audience and adapt
- Connect with people! e.g. "You have such a cute cat!"

B. Phone-banking Station

Scenario: You're calling someone who signed a postcard last week and asking them to come out to a hearing in two days to speak against a proposed coal-fired power-plant in your community.

Directions: Have folks pair off and take turns calling one another. Half way through the activity, ask for people to switch partners. Participants can play different characters, but they should be realistic. You might want to print out and provide a sample phone banking script for participants.

Hi, is this _____?

Hey, this is [your name], from the Sierra Student Coalition. I'm calling to thank you for signing the postcard against the proposed coal-fired power plant last week.

I also wanted to let you know that there is a really important hearing coming up on Tuesday. It's really important that we have a strong community showing there. Do you think you could make it?

[If yes] Great! The hearing is at _____. Do you need directions?

[If no] I'm sorry to hear that, though I understand everyone has a busy schedule. Would you be willing to make a call to the Governor's office to share your opposition before the hearing?

[If yes] Okay, great. Here's the Gov.'s phone number: _____.

[If no] Okay. Thanks again for your time.

Thanks for taking the time to talk this evening. Take care.

Key lessons:

- Don't be afraid to improvise if your conversation takes you off script
- Read your audience and adapt
- As long as you have them on the line, make asks! Since they have already signed the petition, they already support your cause. Maybe they can mobilize people too.

C. Class Rap Station

Scenario: You're a leader in your school's Seize the Grid Campaign, and you are recruiting new members

to your first meeting of the year.

Directions: Have individuals take turns giving quick (max. 1 minute) improvisational class raps and have other folks at the station give quick feedback. Make sure that everyone has a chance to give a pitch. The point of the station isn't so much about perfecting a rap as it is about hearing how other people make their pitch and about giving each other feedback.

Key lessons:

- Public speaking skills are learned
- Have confidence in your ability to rally your peers to action
- Vary your voice tone and patterns to engage more listeners

2. Debrief [5 min]

After all the sessions are complete, come back to the larger group. Ask for at least three folks to share the large takeaways they got from the stations as a group.

Add: The ADD step introduces new information and tools for learners to consider.

1. Setting Mobilization Goals: The Rule of Halves [10 min]

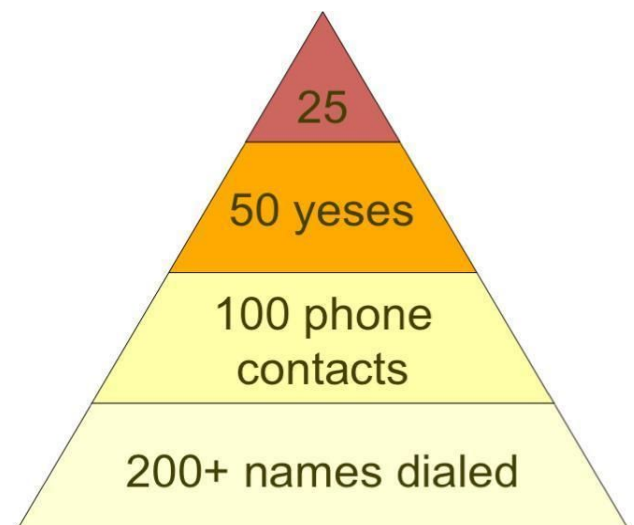
All successful mobilizations start with a goal, and all successful goals start with a metric. The Rule of Halves is the advocacy industry standard for calculating how many people you will need to talk to order to meet a mobilization goal. Let's walk through a scenario so that you can see how the rule of halves works: your group is planning a rally outside the next Air Quality Control Board meeting, and you want 25 people to attend. What's next?

Trainers should flipchart the skeleton of a pyramid like that to the right. The pyramid should be blank, and trainers can write numbers in as they walk through the steps of the rule of halves.

To begin, determine your mobilization goal. How many people do you want to take action? In this case, it's 25. In the pyramid to the right, this goal is written at the top of the pyramid.

You can expect that only half the number of people who say they will take action will actually follow through. So multiply your goal by two and you know how many people have to say yes. So, if you want to mobilize 25 people, then you will need 50 people who say yes.

The most common way of directly following up with your supporters is via phone. You can expect that half of the people who answer your phone call will say yes



to your action. So multiply your number of yeses by two and you know how many people you will need to get on the phone. In this case, it's 100 phone contacts.

Finally, you can expect that only half the people you call will actually answer their phone. So multiply the number of phone contacts by two and you will have the total number of phone calls you need to make. If you were doing this outreach through canvassing, this might be the number of doors that you need to knock on in order to get 100 people to answer.

2. Rule of Halves Example [5 min]

Let's practice using the rule of halves for a supposed mobilization. This time, you'll have to come up with the end goal yourself, too. You're the head of a statewide environmental network planning a march in the state capitol against fracking. You've got a pretty large capacity to turn people out to an event, especially through direct outreach. What is your rule of halves analysis?

After participants take some time to think about this scenario to themselves, ask them to share their answers with the person next to them.

Ask: What mobilization tactics do you think you might want to use to turn people out to this event? What tactics might work better than others? Why?

Away: The AWAY step invites learners to connect their new understanding to the real world context of their lives. (e.g. a personal action plan, commitment, projection into future, etc.)

1. Planning and Envisioning Successful Mobilization [10 min]

To close out this training, I want you to think about the next big event that your group is planning. Maybe it's your first meeting of the new school year. Maybe it's a rally sometime next month. Create a list of the mobilization tactics that you want to use to improve turn out. Then, use the rule of halves to determine exactly how many people you will have to reach out to using those tactics.

Trainers should give people five minutes to finish this part of the activity.

Now, close your eyes if you feel comfortable. Envision yourself canvassing or phone banking to get your peers to attend that event. How do you feel? Nervous? Anxious? Take a deep breath. Think about how much practice you have had in mobilization and how confident you are in your own ability. You're no longer nervous.

Now imagine yourself walking into that event, and seeing all the eager faces of the people who you mobilized. Think about how powerful it feels to take action together. Think about how powerful you are: you brought all these people together! You mobilized people to make change.

Ask people to open their eyes. Are you ready to make this vision possible?

The trainers should then begin the “I believe that we will win!” chant from the front of the room, and once again try to mobilize the participants into action until the training ends with everyone chanting loudly at the center of the room.