

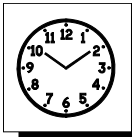
## Module 5: Meetings To Pressure Decision-Makers



### Goals

Participants should come to understand:

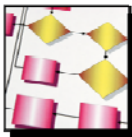
- Grassroots organizing.
- Examples of power that an action can have.
- That every action must have its power component.
- Secondary targets.
- The importance of selecting the right tone for an action.
- Benefits of regular actions.
- Four steps of planning an action.



### Time

Total: One Hour

- Presentation: 30 minutes
- Exercise: 20 minutes
- Debrief: 10 minutes



### Overview

Participants should learn that meetings are necessary when “being right” is not getting you what you want. They should understand how to leverage power in a meeting, understand the types of targets, and understand the four steps to a successful meeting.



### Materials Needed

- Easel paper (five sheets per small group)
- Masking tape
- Dark markers



## Handouts

- Make copies of the handouts as detailed in the Program Preparation section in the front of this manual.
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## Equipment Needed

- Easel/"flipchart" (recommended minimum of two, five is preferable)
  - *If you have elected to develop your own PowerPoint presentation to suit your specific training audience for this module, you will need:*
    - Computer with PowerPoint software
    - LCD Projector
    - All cords and cable needed to connect computer with LCD projector, and extension cord to connect computer and LCD projector with electrical outlet
  - AV stand or tab (if you will be using PowerPoint in this module)
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## Instructor Note

- A meeting with a decision-maker is a brief face-to-face meeting between an organized group of PTA members and a decision-maker or target who can give us what we want. The event is usually held on the decision-maker's turf, often their office, and a specific demand is made by our group. The group expects to get an answer, and expects the answer to be, "Yes."
- A meeting is a tactic in the context of a larger campaign. It is also fun. A meeting is one of the tactics we might list in the last column of the strategy chart.
- A meeting isn't a symbolic event. To succeed, it must have real power behind it. The hardest thing about planning a meeting is figuring out what power we do have and how to show it at the meeting.

## Introduction



### Welcome To Module 5: Meetings To Pressure Decision-Makers

By the end of this module, you should understand:

- Direct action organizing.
- Examples of power that an action could have.
- Every action must have its power component.
- Secondary targets.
- Tone of the action.
- Benefits of regular action.
- Four steps to planning the action.



### Instructor Note

Review the difference between a tactic and a strategy.

- A strategy is the overall plan and it always involves changing power relationships.
- A tactic is one step in carrying out the plan, or the strategy.

Ask the class if anyone has participated in a meeting to pressure a decision-maker. Pick someone to describe the meeting s/he was in. Look for a clue about who to ask when you do the introductions and people tell about their victories.

Be prepared to differentiate between a meeting, a media event and a lobby visit. If you ask two or three participants to describe actions they have been in, you will probably get more media events and lobby visits than true meetings. By lobby visit we mean a smaller number of people going to bring information to an elected official or to ask about the official's position, but not to apply much pressure. Stress that the point is not that one is better than another. They are all useful tools, and it is important to be clear about which tool is being used at any given time.

Share your own example of the power analysis behind a meeting in which you were involved.

## Introduction



### Examples Of Power That A Meeting Could Have

- A politician is made to look unresponsive to voters.
- A school superintendent is shown to be losing the confidence of parents and or teachers BUT... only if the bad publicity will lead to the board directing the superintendent to do what you want. Or, if warranted, replacing him/her.
- A store manager is made to look unreasonable either to consumers or to the manager of the chain. (The more a business spends in advertising, the more vulnerable it is to having its image attacked.)

### Every Action Must Have Its Power Component

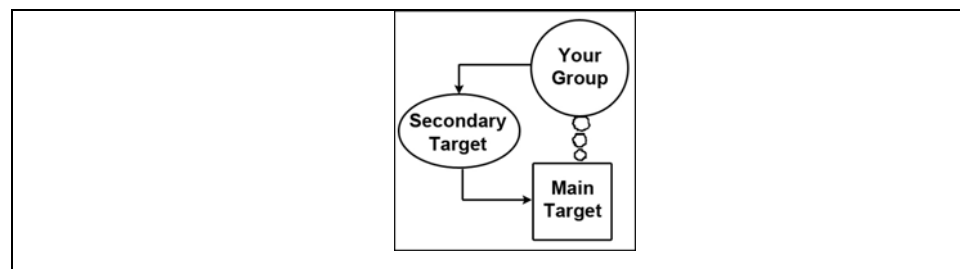
- It is not simply asking, nor is it trying to convince by logic. We have tried those things and failed long before we get to the action stage of the campaign. If, in the beginning of a campaign, we ask for something and get it easily, we assume that we asked for too little. Much later, after the organization has built up a large base and has a reputation for using power, more issues can be settled by negotiations.

### Secondary Targets

A meeting is a tactic of medium power. Actions are often used to get to our target in a roundabout way by going after a secondary target, or someone who can make your real target do what you want but over whom you have more power.



### Display On A Flipchart Or PowerPoint



## Introduction



### Instructor Note

Give a personal example of a meeting you had with a secondary target.



### The Tone Of The Action

The purpose of the action is to showcase your power, which usually comes from your numbers and your ability to reach even more people who aren't in the room. Often, you can boost your power and have more fun if you go outside of the established channels and do something that is not in the experience of the target. Every institution has its channels for dealing with dissatisfaction. Usually we are supposed to fill out forms or write letters and wait for answers; that is within the target's experience.

The concept of getting outside the decision-maker's experience is an important one. There is some purely psychological value in making the decision-maker feel uncomfortable. Sometimes elected officials will make a concession just to get rid of us, because we are bothering them. Unfortunately, we can never make them as uncomfortable as thousands of people will become if the government does not adopt the measures PTA says are necessary.

But beyond discomfort there is the principle of changing the rules. If the old rules don't work for us, we have to change them. Under the old rules our lobbyist or one or two volunteers showed up in the decision-maker's office, had a brief conversation, a lobby visit, and left. If that works, don't change it, but if it isn't working, try getting PTA members to sign 1,000 postcards to the decision-maker in support of the issue you are working on and bring them to your next meeting.

Changing the rules can bring factors into play that we didn't even know existed. It shows that having tried pure logic to convince elected officials we are now going to rely more on the power of numbers. It makes elected officials worry, because they don't know what we might do next. If the rules are working for you, then don't change them, but if they aren't working, then don't feel that all you can do is the same thing over and over.

## Introduction

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### Examples: What Is Outside The Target's Experience?

- When you show up in person instead of writing a letter.
- When you make something public that is usually internal, that is outside the target's experience. A consumer advocate was appointed to a state utility policy study commission. At the first meeting, it was announced that the proceedings were strictly confidential. The consumer advocate said, "I represent the public, and it is my duty to repeat every word said here." After that, commission members knew that there would have to be a real debate; they couldn't just cave into industry demands.
- When you pressure individuals and not the institution as a whole, the individuals may realize that they are personally accountable for policies that they can't justify, and they may be more willing to change them. Don't let them say, "Look, I just work here."
- When you demand that a new person or entity assert jurisdiction over an issue, you may be able to bring in someone fresh who isn't publicly committed to a failed policy. When a community group couldn't get the city council to order the cleanup of an area where hazardous materials were stored, they got the area declared a dump and got the zoning board to say the area wasn't zoned for a dump.
- When you play one administrator or politician off against another, you break up the "clubby" atmosphere in which they are used to operating. For example, members of a legislative committee had an unwritten policy of voting with the committee chair. When citizens held the members of the committee individually accountable, the committee members had to justify their votes on the merits of the issue not on tradition.
- When you work with a decision-maker's office it is important to work both with staff and the decision-maker himself/herself. Often we can change policy by working through the staff. Other times we may need to get a meeting with a decision-maker before the staff will begin to take us and our issues seriously.

## Introduction

### Get Outside The Experience Of The Target



#### Instructor Note

Share your example of going outside the experience of the target.



The more you can get outside of the way things are supposed to work, the better chance you have to gain a victory. But—and this is important--what we do must always be within the experience of our own group, otherwise we lose the advantage. For example, when a group of parents, who wanted a city day care program, brought a large number of children to a meeting with a top city official it really helped them. The official, who was expecting an orderly meeting for which he had prepared all sorts of excuses, was totally thrown off by the kids running around his office. The parents, however, were perfectly comfortable with it. They were used to having the kids play at home, because there was no day care. The point is, to get outside the experience of the target but to stay inside your own experience.

The tone of a meeting needs to be firm enough so that the target knows that the matter won't soon be forgotten. If the target is elected, he or she will be counting the months until election day and wondering how long anyone will remember this meeting, and if anyone will actually vote on the basis of this particular issue. How people act during a meeting is a planned tactic. The point is to show that we feel strongly enough that this won't soon be forgotten. Getting angry often will not advance our cause. Instead, it is probably better to keep control of a meeting or do a low-key action that shows the media that our people are more reasonable than the public official.

Whatever the tone of the action is, it should be discussed in advance, and there should be a reason for it.



## Introduction

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### **But Beware! The Target Is Also Trying To Get Outside Our Experience.**

In one experience a city hall staffer took a group of community people into a Victorian era conference room that was so large, so richly detailed, so deeply carpeted and so beautifully furnished that they were all afraid to speak above a whisper.

Their organizer had to suggest that the meeting be moved to the person's private office where the furniture had been made by the Department of Corrections.

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### **What The Organization Gets Out Of Regular Meetings**

1. **Victories** – Celebrate them!
  2. **Commitment** – Our volunteers can see the organization working for them and understand what it does.
  3. **Relations of power become clearer** – In the course of using this tactic, we gain experience and we learn just what is important to a particular decision-maker. This helps us to win in the future. Some people think that their problems with elected, appointed, or corporate officials stem simply from misunderstandings or typing errors in their letters. Others think that what is important to the decision-maker is that we show that we are right and that we have good research and information. Still others think that the decision-maker gives us what we want, because we are so polite and have such a good relationship with them. Actions give us a chance to test these ideas in practice. What it often comes down to is this. PTA volunteers go as a group to ask for something that seems perfectly reasonable, and is clearly in the interest of children. We are then refused for bad reasons. This helps to clarify that it wasn't a misunderstanding at all. There really is someone making decisions about our children's lives who is not accountable to us.
  4. **Elected officials are demystified** – Often, people ask, "What can we do when institutions like the Congress, the legislature, city council or the school board are made up of individuals who have so much power." By using this tactic, meeting with a
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## Introduction

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decision-maker, we can show our members that, yes, the other side has power to be sure, but they can be influenced by us as well as our opponents.

5. **Frequent actions keep our organization healthy** – An organization, which is regularly engaging decision-makers, planning strategy, and doing turnout, grows and gains the ability to take on more difficult issues, which is just what we want to do.
  6. **Publicity** – We often get publicity, which builds membership and fund raising potential.
  7. **Leadership** – Actions are a good opportunity to build our leadership.
  8. **Demonstrate power** – Actions allow the organization to demonstrate its power. This is important both for relations with elected officials and administrators, as well as with other organizations.
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## Four Steps To Planning The Action



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There are four steps to planning the action.

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### Display On A Flipchart Or PowerPoint

#### Four Steps To Planning The Action:

1. Preparing for the meeting.
2. The meeting itself.
3. The fallback.
4. The follow-up



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### 1. Preparing For The Meeting

#### Power Analysis

Start with power analysis and everything we have learned from our research.

Get an appointment. We can learn a lot about how we are regarded by how easy or difficult it is to get an appointment. Ask the question, why did this person agree to meet with us? If we don't have the power to get the appointment, we will probably lose anyway.

Avoid the situation in which someone says, "Oh, the senator is an old school friend. I'll just invite him for coffee and you can drop in and talk to him." If the meeting is obtained through a personal connection, you won't be able to estimate your strength, and you will be restrained by politeness from saying anything forceful or even requesting direct answers to your questions. The local leader who knows absolutely everyone and can get you in is a great person to have on board when you have no organization, but such people are often the biggest obstacle to grassroots organizing, because they can never sort out their personal relationships from their public relationships and want to treat all elected officials as if they were family members.

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## Four Steps To Planning The Action



### Instructor Note

At a recent training session for another organization, someone said, "Our State Rep. would never meet with as many as 10 people."

The trainer responded. "He probably knows that 10 people are all you really have. Try asking him to meet with 50 people and see if he refuses."

The person said, "Oh we could never get anywhere close to 50 people."



### What Do We Have That The Decision-Maker Wants?

Ask what we have that the decision-maker wants? What can we do, get someone else to do or stop doing so that the decision-maker will make a concession to us?

For example, we can call off our media release if we get our demands now. We can say that if the committee doesn't issue its school discipline report, then we will issue our own report and make them look as if they are trying to hide the problem. Based on our power as an organization, what can we realistically demand and win?

### Get the People Out

Are there special people to have along though not necessarily speaking? If the target is an elected official, perhaps people who made contributions or worked in the campaign should be seen supporting you. If everyone in our group voted for the other candidate and will again, then what would the target gain by giving us anything?

The people who come should be largely from within our own organization or coalition. Everyone should understand the nature of the event. Be careful about outside people who have their own agenda or who may even end up siding with the target.

## Four Steps To Planning The Action

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### Press

Will having the media present help or hurt? If the focus of the action is to threaten to make something public, then obviously we don't want media present or the threat is gone.

On the other hand, if refusing our demand will put the target in a bad light with people who matter to the target, then the media can be essential to the success of the tactic. For example, if you say, "Senator Jones, do you mean to say that you think healthy snacks in schools are a luxury? Does that have anything to do with the large campaign contribution you received from Snack PAC the political arm of the Junk Food Association?" Whatever the answer, it will have greater repercussions for him if made before the media.

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## 2. The Meeting Itself

### Case The Place

Make a floor plan showing where the room to which you are going is located in relation to entrances, stairs, elevators and bathrooms. Check that the building is accessible. There is nothing worse than going in for a meeting and not knowing where to go, or starting for the bathroom and getting lost. ("Is it over already, I was just ... ?")

### Rehearse

The spokesperson (there is only one) should role play the meeting with another volunteer or staff person. Try to anticipate what the target will say and have responses ready. PTA leaders, members or other leaders who have spoken with the target in the past can be helpful. Remember, have your facts right, but facts alone won't win it. Always be aware of the source of your power and make it clear during the meeting.

**The meeting is where you showcase power, not vent frustration.** You want to be able to say things like, "Representative Jones, we have 1,500 members in your district, twice the number of votes that elected you to office. Then you tell him that they all know we are right about this issue. This is how being right really gives us power.

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## Four Steps To Planning The Action

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### Supporting Lines

Participants in a meeting can support the spokesperson by picking up and repeating key lines from the exchange with the target.

Example: Spokesperson: "Representative Jones, you won't talk about the dismal rate of graduation in our city schools, why not?" Group, "Yes, why not?" The group comes back to that theme several more times, but they need to be alerted in advance.

### Assign Organizers

Two people should act as organizers for this (and every) event. One stays in front with the spokesperson to keep our leader calm and focused.



### Instructor Note

Give an account of your experience getting extremely nervous in a public speaking situation. The point is to help the volunteers see that it happens to everyone.

The other organizer stays in the back to insure that the group is saying supporting lines and hasn't drifted off into acting as if they were watching all this on TV.

### Agree On A Signal To Leave

It should come from the spokesperson or the front organizer. It can be a word or a gesture. Once it is given, the whole group must leave. No one is to stay behind to shake hands with the target or discuss the problem of stray cats, no matter how serious that problem is.

### Assign A Note Taker

Write down concessions, refusals and quotable quotes. "My job isn't to worry about how children get to school. My job is to balance the budget." Try to get the target to sign an agreement on the spot if a concession is made.

## Four Steps To Planning The Action

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When you get a concession, make sure that it is specific. Ask:

- When will it be done?
- How much will be done?
- Who will do it?
- Does anyone else have to approve this decision?
- Don't accept. "We'll take care of it, don't worry."

### Call

Call everyone the night before. Make sure of your turnout.

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### 3. The Fallback

There are two parts to the fallback. Both must be planned in advance.

- What to do when the target doesn't show up.
- What to do when target says no.

#### When The Target Doesn't Show Up

- It is always better that the target shows up. Make an appointment and expect that it will be kept. Often the decision-maker is not far away. Go look in other offices or bathrooms.
- Sitting down and saying that you will wait until s/he comes back sometimes speeds thing up.
- Post demands on wall mainly for the TV. Having called the media, we need to have something visual.



#### Instructor Note

Give an example from your experience of a time when a target didn't show up but was nearby and was brought out in response to something that the group did.

## Four Steps To Planning The Action

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### When The Target Says No:

1. We need an agreed upon fallback position, which means asking for less while getting more forceful. (Everyone must agree in advance on what less is. This is where factionalism and wars start.) We say to our city council member, "Please pick up the phone and get us an appointment with the mayor." S/he says, "No!" We say, "O.K. will you write a letter to the mayor and send us a copy?" A fallback is also a face-saver for the target.
2. Try saying "Don't you have the authority to make this decision?" Sometimes they grab at that one, and it gets us an appointment with someone else. (Obviously this is not for use with elected officials when we are discussing how they will vote.)
3. Suggest talking it over at the target's house.
4. Try to get the target to put the refusal in writing. The idea that their response will be publicized may get you something.

If we don't win, it means that we made a miscalculation. We asked for too much given the amount of real power we had, or we didn't make our power explicit. We need to regroup and come up with new demands, more power, or both. Grassroots Organizing assumes that the target is rational and will make decisions in his or her self-interest. If the target starts making irrational responses, we both lose. In that case, it might be better to come back another time.

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### 4. The Follow Up

#### Hold A Quick Meeting Outside

Regroup. Explain what happened, deal with press and announce next steps.

#### Check On Media Coverage

- See if we can maximize it.
  - Carry or email a release to papers. Call radio and TV stations.
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## **Four Steps To Planning The Action**

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### **Put The Agreement In Writing**

If an agreement was reached, we quickly state it in a letter to the target. "Thank you for your agreement to the following terms." We deliver the letter to the target's office. If the content of the letter isn't disputed by the target, it is almost as good as a signed agreement.

### **Go Celebrate Together**

### **Later Call And Thank Everyone**

Follow up on no-shows. Thank new people for coming. Congratulate other leaders.

### **Hold A Formal Debriefing**

Do it within the next week. Critique the meeting. This is how we improve the advocacy skills of our organization. We will discuss the soundness of our strategy, how well the individual tactics moved the strategy forward, and how well we implemented the tactics.

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## Decision-Maker Meeting Exercise



### Instructor Note

On the pages that follow are directions for a Decision-Maker Meeting Exercise.

As stated in the *Getting Started>About This Manual>Three Types Of Campaign Exercises* section of this manual (page viii), there are three case studies available. Each illustrates advocacy at the local, state, or federal level. You should have selected the level you believe to be most appropriate and relevant to your group, and copied the handouts for that level's case study to use in the following exercise.

Reminder, the design of this course is for the level addressed to remain consistent throughout. That is, if you work the local level case study in this module, you should work the local level case studies in all the other modules.

## Decision-Maker Meeting Exercise — Local

**Local**

### The St. Finbar Education Coalition Meets With Linda Nagashima



This role play continues the theme of the use of power in organizing. Here, the group must correctly analyze the self-interest of a member of the school board and analyze the election statistics in order to discover what real power they have. The role play also teaches planning and strategy development. It allows room for creative tactics if they are in the context of an overall plan. It enables the trainers to separately evaluate the participant's ability to plan strategy and to carry it out.

Conditions during an actual face-to-face meeting with an elected official are simulated. The participants practice the skills of backing up a spokesperson, maintaining group discipline, keeping the proper tone and not allowing themselves to be diverted to side issues.

This is an issue on which it is possible to gain some allies thus introducing or incorporating coalition building.



Total: 30 minutes

- Exercise: 20 minutes
- Debrief: 10 minutes

## Decision-Maker Meeting Exercise Instructions

**Local**



Make up teams with a strong person leading the PTA side. That person should lead the planning session and be the main spokesperson during the action. School Board (Nagashima's) team can be as large as one quarter the size of the PTA team, or as small as three people, always with one main spokesperson playing the role of the school board member. In real life, elected officials would not likely have more than two staff in the meeting. If the total group is larger than 25 people, consider doing the role play in two sections if other rooms and trainers are available.

Since this is the last role play of the training one of the trainers should play the role of the school board member. The reason for this is that a non-trainer often decides to dig-in and not make any concessions no matter how well the PTA group is doing. This

## Decision-Maker Meeting Exercise Instructions

Local

could lead to the group feeling “cheated” and you don’t want to end the training on a sour note. We want the PTA team to win. If they have learned the principles and are demonstrating enough power such that they really would win in real life then the decision-maker should make a concession, either giving them all or part of what they have asked for based on their show of power. However, don’t give it to them just to be nice. They have to earn it!

Give out the background sheet and ask if there are any questions. Say that the action should be planned to last not more than 15 minutes. Tell the group that they should refer to the information in the Strategy Chart Exercise. Have extra copies for those who did not save them.

Say that the main training room is the target’s office. Send the PTA team to another room. The school board member’s team can set up its room any way it likes. If your meeting space is limited and the break out room is small, have that be the school board members’ room. Have the PTA team plan in the larger room and then “go to the school board member’s office” which can be in the smaller room. People will have to cram in which is often how such a meeting unfolds in real life.

When the groups are in their rooms, hand out worksheets. Remind each team that the meeting will begin in exactly 45 minutes.

Make easel paper, tape and markers available for planning.

Trainers should make the rounds of the planning groups to observe group process and strategy development. When you stop in on the school board member’s team, remind them that their main self-interest is to get re-elected. They should act realistically to solve the problem, and not simply refuse to do anything. Remind them also that they are not ideological about the issue; they only want to get re-elected. If a trainer is in the role of the commissioner, it is probably not necessary to do this.

## Decision-Maker Meeting Exercise Debrief

Local



The PTA team really ought to win something. If, during the preparation session it appears that the commissioner's team is going to refuse any concession, explain to them that their goal is to make the problem go away, not to inflame it further.

If the PTA team fails to win its demands, the trainer needs to make a quick judgment early in the debriefing as to whether the problem was a poor strategy or poor tactics in carrying out the strategy. Try asking the commissioner's team what was the most they were prepared to give. Then ask why they didn't give it. If they respond, "We couldn't get a word in," and your own observations confirm this, point it out. Ask the PTA team what was the least they would have accepted. If anything close to that was actually offered, ask why they didn't accept it. **Often, they will be unaware that an offer was even made.**

There may be times when the school board member's team tries to blame its lack of concession on the conduct of the PTA team. If, on the basis of what you saw in the role play and in the preparation session, that is merely an excuse, say so. It is an old trick of people in power to tell a group, "I was just about to do what you wanted, but you asked for it in the wrong tone of voice, so now you can't have it." We have heard that one many times in real life.

For the PTA team, winning depends on having a real threat and being prepared to use it. If you can't identify what it was, ask them. If there was no threat, indicate that. If the threat is already being carried out before the action starts, and can't be called off, then it doesn't give the PTA team any bargaining power. If the PTA team doesn't get a chance to make the threat explicit, because the school board member controlled the meeting, make that clear as well. Usually, the main problem is that the PTA team didn't press for an answer and was willing to leave with no commitment.

Ask each team questions until you get a picture of what they intended to have happen. Most of the debriefing consists of contrasting this picture with what went on in the role play. Keep sorting out problems with strategy (having power), from problems with tactics (showing power).

Use the Target/Trainer Score Sheet to record your observations of each team's performance.

## Decision-Maker Meeting Exercise Debrief

Local

### Debriefing Pattern

1. Ask everyone to get up and sit someplace else. This is the best way to get them out of their roles. If you neglect to do it, they will continue the role play into the debriefing, and you will have nothing but an argument.
2. Ask each team, in turn, what its strategy was?
3. Ask each team how well it felt it carried out the strategy?
4. Ask the PTA team to state what all of its demands were? Did they have fallback demands? Were the demands within their ability to win?
5. If a trainer played the school board member ask him/her to read the Target/Trainer Score Sheet and explain the scoring. What did the PTA team do based on the score?
6. Analyze each strategy plan to make sure that each team correctly understood the following:
  - Its own self-interest.
  - The self-interest of the other team.
  - Its own power and the limits on its power.
  - The power and limits of the other team.
7. What use was made of outside allies?
8. Point out things that people did that were particularly helpful. What role did the organizer play?

End with comments on the quality of the strategy plan, then on tactics, and then implementation. Keep them separate. Participants should understand that they might be good at one and need work on the other. Your final remarks should be on the two or three things that you thought were done best by each team.

## Decision-Maker Meeting Target/Trainer Score Sheet

**Local**

Check Box If Skill Is Shown	Skill
<input type="checkbox"/>	1. Began on time.
<input type="checkbox"/>	2. Group entered together, showed unity.
<input type="checkbox"/>	3. Strong, unifying, opening statement by spokesperson.
<input type="checkbox"/>	4. Spokesperson polite but firm. Didn't allow you to take over the meeting, although you tried.
<input type="checkbox"/>	5. Additional show of power such as petitions, letters, voter registration forms.
<input type="checkbox"/>	6. Statements from the organized groups that mentioned numbers.
<input type="checkbox"/>	7. Someone knew the results of your last election.
<input type="checkbox"/>	8. Had fallback demands.
<input type="checkbox"/>	9. Organizers played active role.
<input type="checkbox"/>	10. Group did not imply that it would never support you even if you agreed.
<input type="checkbox"/>	11. Tactics appropriate to strategy.
<input type="checkbox"/>	12. Plan for dealing with the media.
<input type="checkbox"/>	<b>Total number of checks to determine score. Each question is worth either zero, or one, no fractions.</b>
Score (# of checks)	Scoring
10 - 12	Concession on major demand
6 - 9	Concession on all fallbacks
4 - 5	Another meeting
0 - 3	Nothing
Excessive Rudeness	Nothing. Be prepared to explain.

## Decision-Maker Meeting Exercise — State

**State**

### The Fremont PTA Meets With Sen. Olivia Rosten



This role play continues the theme of the use of power in organizing. Here, the group must correctly analyze the self-interest of a state senator and analyze the election statistics in order to discover what real power they have. The role play also teaches planning and strategy development. It allows room for creative tactics if they are in the context of an overall plan. It enables the trainers to separately evaluate the participant's ability to plan strategy and to carry it out.

Conditions during an actual face-to-face meeting with an elected official are simulated. The participants practice the skills of backing up a spokesperson, maintaining group discipline, keeping the proper tone and not allowing themselves to be diverted to side issues.

This is an issue on which it is possible to gain some allies thus introducing or incorporating coalition building.



Total: 30 minutes

- Exercise: 20 minutes
- Debrief: 10 minutes

## Decision-Maker Meeting Instructions

**State**



Make up teams with a strong person leading the PTA side. The PTA team should also have an organizer assigned to it. Say that the organizer should lead the planning session and that the leader should be the main spokesperson during the action. State Sen. Rosten's team can be as large as one quarter the size of the PTA team, or as small as three people, always with one main spokesperson playing the role of the senator. In real life, elected officials would not likely have more than two staff members in the meeting. If the total group is larger than 25 people, consider doing the role play in two sections if other rooms and trainers are available.

Since this is the last role play of the training one of the trainers should play the role of Sen. Rosten. The reason for this is that a



## Decision-Maker Meeting Instructions

## State

non-trainer often decides to dig-in and not make any concessions no matter how well the PTA group is doing. This could lead to the group feeling “cheated” and you don’t want to end the training on a sour note. We want the PTA team to win. If they have learned the principles and are demonstrating enough power such that they really would win in real life, then the decision-maker should make a concession, either giving them all or part of what they have asked for based on their show of power. However, don’t give it to them just to be nice. They have to earn it!

Give out the background sheet and ask if there are any questions. Say that the action should be planned to last not more than 15 minutes. Tell the group that they should refer to the information in the Strategy Chart Exercise. Have extra copies for those who did not save them.

Say that the main training room is the target’s office. Send the PTA team to another room. The senator’s team can set up its room any way it likes. If your meeting space is limited and the break out room is small, have that be the senator’s office. Have the PTA team plan in the larger room and then “go to the senator’s office,” which can be in the smaller room. People will have to cram in which is often how such a meeting unfolds in real life.

When the groups are in their rooms, hand out worksheets. Remind each team that the meeting will begin in exactly 45 minutes.

Make easel paper, tape and markers available for planning.

Trainers should make the rounds of the planning groups to observe group process and strategy development. When you stop in on the senator’s team, remind them that their main self-interest is to get re-elected. They should act realistically to solve the problem, and not simply refuse to do anything. Remind them also that they are not ideological about the issue; they only want to get reelected. If a trainer is in the role of the senator, it is probably not necessary to do this.

## Decision-Maker Meeting Debrief

State



The PTA team really ought to win something. If, during the preparation session it appears that the senator's team is going to refuse to make any concession, explain to them that their goal is to make the problem go away, not to inflame it further.

If the PTA team fails to win its demands, the trainer needs to make a quick judgment early in the debriefing as to whether the problem was a poor strategy or poor tactics in carrying out the strategy. Try asking the senator's team what was the most they were prepared to give. Then ask why they didn't give it. If they respond, "We couldn't get a word in," and your own observations confirm this, point it out. Ask the PTA team what was the least they would have accepted. If anything close to that was actually offered, ask why they didn't accept it. **Often, they will be unaware that an offer was even made.**

There may be times when the senator's team tries to blame its lack of concession on the conduct of the PTA team. If, on the basis of what you saw in the role play and in the preparation session, that is merely an excuse, say so. It is an old trick of people in power to tell a group, "I was just about to do what you wanted, but you asked for it in the wrong tone of voice, so now you can't have it." We have heard that one many times in real life.

For the PTA team, winning depends on having a real threat and being prepared to use it. If you can't identify what it was, ask them. If there was no threat, indicate that. If the threat is already being carried out before the action starts, and can't be called off, then it doesn't give the PTA team any bargaining power. If the PTA team doesn't get a chance to make the threat explicit, because the senator controlled the meeting, make that clear as well. Usually, the main problem is that the PTA team didn't press for an answer and was willing to leave with no commitment.

Ask each team questions until you get a picture of what they intended to have happen. Most of the debriefing consists of contrasting this picture with what went on in the role play. Keep sorting out problems with strategy (having power), from problems with tactics (showing power).

Use the Target/Trainer Score Sheet to record your observations of each team's performance.

## Decision-Maker Meeting Debrief

State

### Debriefing Pattern

1. Ask everyone to get up and sit someplace else. This is the best way to get them out of their roles. If you neglect to do it, they will continue the role play into the debriefing, and you will have nothing but an argument.
2. Ask each team, in turn, what its strategy was.
3. Ask each team how well it felt it carried out the strategy.
4. Ask the PTA team to state what all of its demands were. Did they have fallback demands? Were the demands within their ability to win?
5. If a trainer played the senator ask him/her to read the Target/Trainer Score Sheet and explain the scoring. What did the PTA team do based on the score?
6. Analyze each strategy plan to make sure that each team correctly understood the following:
  - Its own self-interest.
  - The self-interest of the other team.
  - Its own power and the limits on its power.
  - The power and limits of the other team.
7. What use was made of outside allies?
8. Point out things that people did that were particularly helpful. What role did the organizer play?

End with comments on the quality of the strategy plan, then on tactics, and then implementation. Keep them separate. Participants should understand that they might be good at one and need work on the other. Your final remarks should be on the two or three things that you thought were done best by each team.

## Decision-Maker Meeting Target/Trainer Score Sheet

**State**

Check Box If Skill Is Shown	Skill
<input type="checkbox"/>	1. Began on time.
<input type="checkbox"/>	2. Group entered together, showed unity.
<input type="checkbox"/>	3. Strong, unifying, opening statement by spokesperson.
<input type="checkbox"/>	4. Spokesperson polite but firm. Didn't allow you to take over the meeting, although you tried.
<input type="checkbox"/>	5. Additional show of power such as petitions, letters, voter registration forms.
<input type="checkbox"/>	6. Statements from the organized groups that mentioned numbers.
<input type="checkbox"/>	7. Someone knew the results of your last election.
<input type="checkbox"/>	8. Had fallback demands.
<input type="checkbox"/>	9. Organizers played active role.
<input type="checkbox"/>	10. Group did not imply that it would never support you even if you agreed.
<input type="checkbox"/>	11. Tactics appropriate to strategy.
<input type="checkbox"/>	12. Plan for dealing with the media.
<input type="checkbox"/>	<b>Total number of checks to determine score. Each question is worth either zero, or one, no fractions.</b>
Score (# of checks)	Scoring
10 - 12	Concession on major demand
6 - 9	Concession on all fallbacks
4 - 5	Another meeting
0 - 3	Nothing
Excessive Rudeness	Nothing. Be prepared to explain.

## Decision-Maker Meeting Exercise — Federal

**Federal**

### The PTA County Council Meets With Rep. Ethan Charles



This role play continues the theme of the use of power in organizing. Here, the group must correctly analyze the self-interest of a congressman and analyze the election statistics in order to discover what real power they have. The role play also teaches planning and strategy development. It allows room for creative tactics if they are in the context of an overall plan. It enables the trainers to separately evaluate the participant's ability to plan strategy and to carry it out.

Conditions during an actual face to face meeting with an elected official are simulated. The participants practice the skills of backing up a spokesperson, maintaining group discipline, keeping the proper tone and not allowing themselves to be diverted to side issues.

This is an issue on which it is possible to gain some allies thus introducing or incorporating coalition building.



Total: 30 minutes

- Exercise: 20 minutes
- Debrief: 10 minutes

## Decision-Maker Meeting Instructions

**Federal**



Make up teams with a strong person leading the PTA side. This person should lead the planning session and be the main spokesperson during the action. Rep. Charles' team can be as large as one quarter the size of the PTA team, or as small as three people, always with one main spokesperson playing the role of the congressman. In real life elected officials would not likely have more than two staff in the meeting. If the total group is larger than 25 people, consider doing the role play in two sections if other rooms and trainers are available.

Since this is the last role play of the training one of the trainers should play the role of Rep. Charles. The reason for this is that a non-trainer often decides to dig-in and not make any concessions no matter how well the PTA group is doing. This could lead to the group feeling "cheated" and you don't want to end the training on

## Decision-Maker Meeting Instructions

**Federal**

a sour note. We want the PTA team to win. If they have learned the principles and are demonstrating enough power such that they really would win in real life, then the decision-maker should make a concession, either giving them all or part of what they have asked for based on their show of power. However, don't give it to them just to be nice. They have to earn it!

Give out the background sheet and ask if there are any questions. Say that the action should be planned to last not more than 15 minutes. Tell the group that they should refer to the information in the Strategy Chart Exercise. Have extra copies for those who did not save them.

Say that the main training room is the target's office. Send the PTA team to another room. The congressman's team can set up its room any way it likes. If your meeting space is limited and the break out room is small, have that be the congressman's office. Have the PTA team plan in the larger room and then "go to the congressman's office" which can be in the smaller room. People will have to cram in which is often how such a meeting unfolds in real life.

When the groups are in their rooms, hand out worksheets. Remind each team that the meeting will begin in exactly 45 minutes.

Make easel paper, tape and markers available for planning.

Trainers should make the rounds of the planning groups to observe group process and strategy development. When you stop in on the congressman's team, remind them that their main self-interest is to get re-elected. They should act realistically to solve the problem, and not simply refuse to do anything. Remind them also that they are not ideological about the issue; they only want to get reelected. If a trainer is in the role of the congressman, it is probably not necessary to do this.

## Decision-Maker Meeting Debrief

**Federal**



The PTA team really ought to win something. If, during the preparation session it appears that the congressman's team is going to refuse to make any concession, explain to them that their goal is to make the problem go away, not to inflame it further.

## Decision-Maker Meeting Debrief

Federal

If the PTA team fails to win its demands, the trainer needs to make a quick judgment early in the debriefing as to whether the problem was a poor strategy or poor tactics in carrying out the strategy. Try asking the congressman's team what was the most they were prepared to give. Then ask why they didn't give it. If they respond, "We couldn't get a word in," and your own observations confirm this, point it out. Ask the PTA team what was the least they would have accepted. If anything close to that was actually offered, ask why they didn't accept it. **Often, they will be unaware that an offer was even made.**

There may be times when the congressman's team tries to blame its lack of concession on the conduct of the PTA team. If, on the basis of what you saw in the role play and in the preparation session, that is merely an excuse, say so. It is an old trick of people in power to tell a group, "I was just about to do what you wanted, but you asked for it in the wrong tone of voice, so now you can't have it." We have heard that one many times in real life.

For the PTA team, winning depends on having a real threat and being prepared to use it. If you can't identify what it was, ask them. If there was no threat, indicate that. If the threat is already being carried out before the action starts, and can't be called off, then it doesn't give the PTA team any bargaining power. If the PTA team doesn't get a chance to make the threat explicit, because the congressman controlled the meeting, make that clear as well. Usually, the main problem is that the PTA team didn't press for an answer and was willing to leave with no commitment.

Ask each team questions until you get a picture of what they intended to have happen. Most of the debriefing consists of contrasting this picture with what went on in the role play. Keep sorting out problems with strategy (having power), from problems with tactics (showing power).

Use the Target/Trainer Score Sheet to record your observations of the team's performance.

## Decision-Maker Meeting Debrief

Federal

### Debriefing Pattern

1. Ask everyone to get up and sit someplace else. This is the best way to get them out of their roles. If you neglect to do it, they will continue the role play into the debriefing, and you will have nothing but an argument.
2. Ask each team, in turn, what its strategy was.
3. Ask each team how well it felt it carried out the strategy.
4. Ask the PTA team to state what all of its demands were. Did they have fallback demands? Were the demands within their ability to win?
5. If a trainer played the congressman ask him/her to read the Target/Trainer Score Sheet and explain the scoring. What did the PTA team do based on the score?
6. Analyze each strategy plan to make sure that each team correctly understood the following:
  - Its own self-interest.
  - The self-interest of the other team.
  - Its own power and the limits on its power.
  - The power and limits of the other team.
7. What use was made of outside allies?
8. Point out things that people did that were particularly helpful.

End with comments on the quality of the strategy plan, then on tactics, and then implementation. Keep them separate. Participants should understand that they might be good at one and need work on the other. Your final remarks should be on the two or three things that you thought were done best by each team.



## Decision-Maker Meeting Target/Trainer Score Sheet

**Federal**

Check Box If Skill Is Shown	Skill
<input type="checkbox"/>	1. Began on time.
<input type="checkbox"/>	2. Group entered together, showed unity.
<input type="checkbox"/>	3. Strong, unifying, opening statement by spokesperson.
<input type="checkbox"/>	4. Spokesperson polite but firm. Didn't allow you to take over the meeting, although you tried.
<input type="checkbox"/>	5. Additional show of power such as petitions, letters, voter registration forms.
<input type="checkbox"/>	6. Statements from the organized groups that mentioned numbers.
<input type="checkbox"/>	7. Someone knew the results of your last election.
<input type="checkbox"/>	8. Had fallback demands.
<input type="checkbox"/>	9. Organizers played active role.
<input type="checkbox"/>	10. Group did not imply that it would never support you even if you agreed.
<input type="checkbox"/>	11. Tactics appropriate to strategy.
<input type="checkbox"/>	12. Plan for dealing with the media.
<input type="checkbox"/>	<b>Total number of checks to determine score. Each question is worth either zero, or one, no fractions.</b>
Score (# of checks)	Scoring
10 - 12	Concession on major demand
6 - 9	Concession on all fallbacks
4 - 5	Another meeting
0 - 3	Nothing
Excessive Rudeness	Nothing. Be prepared to explain.



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## **Transition To Module 6: Motivating Parents On CCSS**

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