

Module 2: Strategy



GOALS

By the end of this module, participants should be able to:

- See that organizing is logical and systematic.
- Think strategically, not tactically.
- Understand that strategy is about power relationships.
- Use the Midwest Academy Strategy Chart to plan PTA activities and incorporate ways to build PTA into each activity.



TIME

Total: 60 minutes

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



OVERVIEW

This is the main part of the training, all other pieces flow from it. Starting with a blank strategy chart on a black/white board or wall, the trainer goes through the five columns: Goals, Organizational Considerations, Constituencies, Decision-makers, and Tactics. Next, show how each plays a vital role in developing a workable, winning issue campaign strategy that builds the organization. The objective is to get the participants to think strategically whenever they think about working on an issue. The natural tendency is to think tactically (i.e., “What event or demonstration can we conduct to dramatize our situation?”). The job of the trainer is to get the participants to hold all thoughts of tactics until the end of the process.

Space needs to be identified for small groups of up to eight people each. There is only time for one trainer to debrief three charts. If you have more than 24 people then it is best to create six groups of four people each. After the groups work on their charts for 20 minutes each, the trainer then debriefs three groups in separate rooms. If the main training room is very large, several small groups can meet in it. Others will need breakout rooms or space where six-to-eight people can meet, hear each other, and fill out the chart.



MATERIALS NEEDED

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



HANDOUTS

- PowerPoint Printout
- Strategy Chart Blank
- Strategy Chart Sample
- Strategy Exercise (Federal, State or Local from Exercise Kit)



EQUIPMENT NEEDED

- Easel/flipchart
- 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)
 - Portable speakers for videos



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Introduction

WELCOME TO MODULE 2: STRATEGY



SAY

By the end of this module, you should be able to:

- See that organizing is logical and systematic.
- Think strategically, not tactically.
- Understand that strategy is about power relationships.
- Use the “Strategy Chart” to plan PTA activities and incorporate ways to build PTA into each activity.



INSTRUCTOR NOTE

Strategy charts should never be displayed on an easel. Always show all five columns at once. This is also true when you debrief the group's charts. A chart can't be debriefed a page at a time, you must always be able to see the whole chart and how the columns relate.



SAY

The strategy chart is one of the most useful tools that we have found for consistently doing good planning. The value of the chart is that it poses the right questions in the right order. Learn how to use it for planning individually, but also for leading group discussions. It prevents people from going on too many tangents, and it provides an outline for the discussion.

At first glance, the chart appears to be a series of lists. Actually, it works like a spread sheet. All five columns need to be wired together, so that if anything changes in one column, you must make appropriate changes in the others. As in a spreadsheet, there are certain mathematical relationships in the chart. Your demands have to be equal to your power, and your tactics must have a direct cost to your target. I'll explain all of this in a moment, but first:



ASK

Who remembers the difference between a strategy and a tactic?

[Answer: The strategy is the overall plan. A tactic is something you do to carry out the plan. It is a step in carrying out the plan.]



DISPLAY ON A FLIPCHART OR POWERPOINT:

The chart consists of five columns which correspond to the five basic elements of strategy:

1. **Goals:** The victory you want to win.
2. **Considerations:** What you have to put into the fight, and what you want to get out of it organizationally.
3. **Constituents:** The answer to the question, who else cares about this problem enough to join us in doing something about it?
4. **Decision-Makers:** Those who can give you what you want.
5. **Tactics:** The things that you and your constituents do to the decision-makers to make the target give you what you want.



INSTRUCTOR NOTE

Remind the group of the difference between a problem and an issue that was mentioned in the introduction.

- The problem is what is wrong.
- The issue is the solution for which you are working.



SAY

Let's go over these, one column at a time.

1. GOALS

The Goals column can be divided into three categories: long-term, intermediate, and short-term goals. This is done to encourage you to think of organizing as a process that goes on over a period of time, rather than a one-shot episode for a limited objective. It helps to break larger issues down into smaller winnable components, which in turn, gives you a chance to build the organization.

- **Long-term goals:** These may extend beyond the particular campaign on which you are presently working. For example, a local PTA may have a long-term goal of improving the health and lowering the obesity rates of children in their school.
- **Intermediate goals:** The intermediate goals are the issues you want to win in this campaign. For the local PTA in the example above, it might be to require that physical education programs be restored to all schools in the district.
- **Short-term goals:** Short-term goals are steps towards your intermediate goals. The local PTA might request that the school board hold a community hearing on the physical condition of school children in the district. The hearing will give you a local activity around which to build the campaign, and create a forum in which to present the adverse effects of cutting the Physical Education program and demonstrating your power. If you are in a large city, you might request several hearings to organize people in different neighborhoods.
- To survive, particularly in a long campaign, a group must move from victory to victory. Always build in some small but quick victories, if for no other reason than it builds morale.

- Once you have done a chart for the overall campaign, go back and do others for each of the short-term and intermediate goals. An actual working strategy chart only applies to one level of goals, the goal on which the group is about to take action, but it is necessary to see where this fits into the larger campaign.
- Remember that we use the word “goals” a bit differently than in everyday language. In the chart, a goal can only be something that you intend to win from someone. If you want to build your membership, that isn't considered a goal here, it goes in the next column, Organizational Considerations. If you want to educate people about an issue, that also isn't a goal in the strategy chart, it is tactic, and goes in the last column. Goals are always what you want to win in an issue campaign.



INSTRUCTOR NOTE

Occasionally, someone questions this definition of the word “goal,” or says that according to the dictionary there is really no difference between goals and objectives. Do not get into an argument about this, or any other use of language definition. Simply say that they are right, but that we are using the words a little differently. In this case, we want to make a distinction between issue goals and organizational goals.



SAY

Let's look at the second column.

2. ORGANIZATIONAL CONSIDERATIONS

We are going to look at the three elements of organizational considerations:

- Resources
- Organizational gains
- Internal problems



INSTRUCTOR NOTE

Separate the column for organizational considerations into three parts.

- First — list the resources that the organization has to invest in the campaign.
- Second — list the gains the organization hopes to realize from the campaign. Stress the importance of asking “How will this campaign build the organization?”
- Third — list internal problems.



SAY

First, Resources

What is the organization going to invest in this campaign? How much volunteer time? How much money and leadership time? What additional resources does it bring: members, reputation, physical facilities, press contacts, allied groups, or research ability? This is the place to put the campaign budget. Every campaign ought to have its own budget. This is also where staff time allocations are made if there is any staff and volunteer allocations. Don't count people or resources twice. If someone is doing another task within PTA, put down a realistic fraction of their time for this campaign.

Next, Organizational Gains

What do you want the organization to look like after the campaign? How many new PTA members? How many new members can be added to particular committees? Put in the number. How many people will take on greater leadership responsibility? Name them if you can. How much money can be raised during the campaign? What new allies do you want to make? Don't say, "more" or "better." Give specific names and numbers! These organizational gains are often confused with issue goals, and people put them in the first column by mistake.

Finally, Internal Problems

List any problems internal to your organization that are going to get in the way of the success of the campaign. By internal problems we mean things like budget problems, racial and ethnic tension, personality clashes among leaders, too few volunteers, etc.

Develop plans for eliminating or dealing with them.



SAY

Let's move on to the third column. Now we are going to look closer at the subject of constituents, allies, and opponents.

3. CONSTITUENTS, ALLIES, AND OPPONENTS

Constituents

The Constituency column is where you list all the people and organizations that can be activated in some way to support you. The level of activity may vary from signing a petition to actually attending an event. This column is the answer to the question, "Who cares about this issue?" List everyone who cares, why they care and how many of them there are. Is there some reason why the target would be worried by their participation in your campaign?

The point here is to list the way people are organized or grouped. It isn't helpful to say that "everyone" cares, or "all the transit riders care," because you usually can't reach everybody one by one. You can best reach people who are organized, live in certain places, belong to certain churches, community groups or unions, read certain publications in which you can advertise or get a story, or are on certain mailing lists, etc. If you need to mobilize a lot of people quickly, or build a multi-organization campaign, then think of how people are already organized. If your unit wants to develop its own membership, then think about how the issue affects people as individuals, and where to find the most strongly affected people.

When listing people and groups that might be interested in, or affected by, the issues be as expansive as possible, even far-fetched. Then, separate out those you really want to be a part of the organization or campaign, those you want as allies, those you want to neutralize, and those you want to keep away. Think outside the box. Often, stronger communities

(e.g., stronger communities may have a very active PTA unit, strong community organization, active NAACP branch, strong education coalition, etc.) already have school board members, city council members or legislators who support our positions. The problem is that there are not enough of them and we need to get additional support from other communities.

Allies

Allies are people who support us, but who, for whatever reason, are not potential members of our organization. For example, the Latino Action Network might work very closely with us on some issues but must maintain its own organizational identity for a variety of reasons. We'll talk more about this when we discuss building coalitions. Individual policy-makers can also move from target to ally and vice-versa.

Opponents

List the groups or individuals who will actively oppose you. You may not be able to do anything about them, but it is useful to anticipate who will be on the other side. Do not get sidetracked into fighting with your opponents. They do not have the power to make the decision. Our job is to show the target that we have more power than the opposition.



SAY

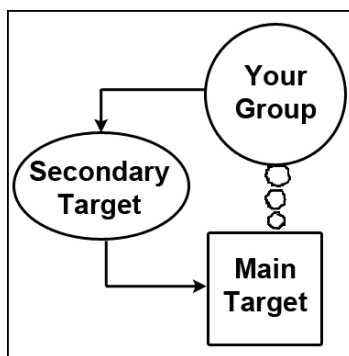
Let's take a look at our fourth column, targets (decision-makers).

4. TARGETS (DECISION-MAKERS)

There are two types of targets: primary decision-makers and secondary targets.



DRAW ON CHART



SAY

First, let's consider the primary decision-maker.

The primary decision-maker is the person who can give us what we want and is not necessarily a bad person. A person becomes the target of the campaign just by virtue of having the power to make (or not make) the decision we want. If there is no clear target, we are unlikely to have a successful campaign. The decision-maker is always a "who." It is always a person or persons who have the power to give us what we want. A target is

not a department such as the Board of Education. However, the specific, individual board members can be targets. It is not the legislature, or a building (city hall). It is one or more individuals who are in a position to say “Yes” or “No” to our demands. Individuals are the weak link in any institution. As an institution, our legislators may have a mutually agreed upon policy. But, as individuals, each one has a different set of fears, likes, dislikes, ambitions, rivalries, business interests or political connections. We can win over individuals by appealing to their personal self-interest.

- Our ability to get a decision-maker to give us what we want is a function of our power over him or her, not a function of how polite or impolite we might be, how smart we are, or how much research we did, although all that helps. In dealing with decision-makers, we have to demonstrate our power.
- When the primary decision-maker is the head of a corporation, power is usually measured in the dollars that might be lost by the company, or in our ability to bring regulatory agencies into the situation. When the primary decision-maker is an elected official, power is measured in votes. Do we hold the balance of power? Will our members really vote on the basis of this issue? Is there someone else to vote for? An elected official usually knows if our constituents have never voted for him and never will, in which case we have very little power, and we need to find ways to cut the issue so as to get support from a broader range of people.
- Determining the basis of our power over a primary decision-maker is critical to our overall strategy. A misjudgment here can negate the best of all other plans.

Next, there is the secondary target or indirect power person.

- Remember, we just finished discussing primary targets/decision-makers: The people who can give you what you want.
- Secondary targets: People over whom you have more power than you have over your primary target/decision-maker. They, in turn, have more power over the primary decision-maker than you do. For example, in the Physical Education campaign that I mentioned earlier, let's say that the superintendent of schools is an appointed official. The local PTA has no direct power over this individual. However, let's say that the school board is appointed and the superintendent is appointed by the mayor (who is elected). Citizens vote for the mayor, and the mayor is responsible for the actions of those he or she appoints. You target the mayor as the primary decision-maker. If you are unable to get a meeting with the mayor, you might look for a secondary target who can pressure the mayor to meet with you. For example, a major contributor to the mayor's campaign over whom we have some power such as a local storeowner, or award leader who turns out a big vote for the mayor and has many active PTA members in the ward. There is not always a secondary target. If your target is an elected official and large numbers of your constituents register to vote, and if your campaign is a popular one, then you will have direct power over the politician. When listing decision-makers, clearly label them primary and secondary targets, and indicate who is useful in putting pressure on whom.

- To repeat, because primary decision-maker are often elected officials, it is important that you understand the political context in which you will be operating. The PTA is nonpartisan and does not endorse candidates. However, we still need to know the electoral process, the electoral numbers and the dates of the primary and general elections. When was the primary decision-maker's last election? Is the school board election at the same time as other local elections or is it a stand-alone election? Are members elected by district or at large? How long has she or he been in office? How many people voted in the last election? How many votes did the target get?
- By finding out these numbers, we will be able to determine how many people we need to organize to effectively influence the primary decision-maker.



SAY

Let's take a look at our fifth column, tactics.

5. TACTICS



INSTRUCTOR NOTE

Dramatically point to the appropriate columns of the Strategy Chart as you say the words below.



SAY

- Tactics are what the people in the Constituents column do to the people in the Targets (Decision-Maker) column to apply pressure to them and make them give us the things in the Goals column in such a way that it builds the organization as in the Organizational Considerations column. For every tactic, there must be someone to do it, someone to whom it is done, and some reason why the person to whom it is done doesn't want it done and will make a concession to us to get us to stop doing it.
- This is the fun part. Develop clever tactics that demonstrate and build power and make sense to your members. Be as creative as possible while remembering to go through the other four steps in the strategy first.
- The main point in tactics is that any tactic has to have an element of real power behind it. It is not just something to show how you feel about an issue. Tactics are chosen in relationship to how much power the organization has. We often say that a good tactic is like standing on the decision-maker's foot until s/he pays you to go away. Hearings, rallies, petitions, meetings with the target and leafleting are all tactics, and all require the organization to have some measure of power. For example, bringing off a successful community meeting at which a state legislator is held accountable requires a more powerful group to organize it. We are simply making it clear that we cannot support people whose actions are opposed to ours and our children's best interests. There was a suburban group that was unhappy with a position taken by the area's state representative. They invited him to a gathering and served coffee, cake and cookies. It was very proper, but everyone in the room had either worked in, or given money to, his campaign. There could not have been a stronger show of power. When they expressed their displeasure with his stand on the legislative issue with which they were concerned, he clearly understood the power they had. It did not need to be said.

- Tactics such as holding signs outside an elected official's office have symbolic value and can be a good media kickoff for a campaign, but they are not a substitute for a strong voting bloc. Another element in choosing tactics is that they are outside the experience of the target and within the experience of the people we are organizing. Our members need to be comfortable with the tactics.
- If your PTA unit conducts voter registration drives make sure that you include voter registration as one of your tactics and incorporate it into as many activities as possible. For instance, at community forums, candidate forums, accountability sessions, or any large action, encourage everyone to register to vote and have registrars present. Do this in a very visible way to indicate that you are building the power of your unit.

Please note, however, that although you can inform an official that you are doing nonpartisan voter registration drives, you may not in any way discuss how we do it, get suggestions from the official as to how you should do it, or otherwise coordinate the activity with any elected official or his/her representative.



INSTRUCTOR NOTE

After going through the chart once, pointing out the appropriate questions, go through it again quickly using a campaign from your own experience as a model.

THIS IS ESSENTIAL FOR THE GROUP TO REALLY UNDERSTAND HOW TO USE THE CHART!

Make sure that your example is on the right scale for the group. Don't tell a group with a very local issue, the details of how you won the fight for some large national issue. Indicate actual goals, organizational considerations, constituency, who the decision-makers were, why they were chosen and tactics that were used. If you have clippings from the campaign, make a packet and pass it around for all to see.

After presenting your chart, add a timeline. Talk here about how a campaign needs to fit into the organization's calendar. Holidays, seasons (weather), the school calendar, elections, all have to be factored in.



INSTRUCTOR NOTE

On the pages that follow are directions for a Strategy Exercise.

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 the 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.

Strategy Exercise

Local

THE CAMPAIGN TO RESTORE BUS SERVICE TO ST. FINBAR MAGNET SCHOOLS

OVERVIEW

Participants practice creating a strategy chart for an issue advocacy campaign using a hypothetical scenario involving a local school district.



TIME

Total: 30 minutes

- Exercise: 20 minutes
- Debrief: 10 minutes

BACKGROUND

St. Finbar is a fictitious city in the U.S. The school system, including charter schools, serves 135,000 students distributed between 119 elementary schools, 24 middle schools and 30 high schools. The annual school budget is \$1.2 billion, which was inadequate before the economic downturn and has typically become less adequate as costs have risen. At the same time income from taxes has declined. The students are majority non-White. Latinos make up 44% of the student population, followed by non-Hispanic White students at 25%, African Americans at 13% and the remaining 15% are largely Asian.

THE PROBLEM

The school board has announced, in a moment of ill-advised budgeting frenzy that to save \$10 million dollars, school bus service for all 25 magnet schools will be eliminated starting in September. The board's vote was unanimous. It is now February. The absence of bus service will be a major blow to your school as 57% of the students now ride the bus and many families can't afford to bring their children to school by other means.

The school board, which has final decision-making power over the budget, consists of five members who are elected to four-year terms on a staggered basis. The at-large school board election takes place at the same time as the City Council election. While almost 800,000 (54%) voted in the last City Council election, only 500,000 of those voted in the school board race (lower down on the ballot).

YOUR ORGANIZATION

You are members of the PTA at the Linguistic Institute, an elementary magnet school devoted to graduating truly bilingual students. Your school has over 800 students. Slightly more than half of them qualify for free or reduced-cost lunches, indicating that the school has diversity of income as well as race. The Institute is known as a 100% magnet, meaning that none of the students attend because it is their local school. All are in the magnet program.

Your PTA has four officers and five board members plus a class parent in each class. Usually not more than 30 people show up for PTA meetings but since the bus cuts were announced, more than 100 people, have been coming.

THE SCHOOL BOARD

Name	Notes
<p>Hubert Gonzalez</p> <p>Won Last Election By 72%</p> <p>Running in Next Election: Yes</p>	<p>Mr. Gonzalez has a background as a community organizer, working to revitalize low-income neighborhoods and creating networks for parents of pre-school aged children. He served five years as president of the Relational Organizing Institute and has also worked for the Local Efforts Support Corporation, the Vomer science and Education Foundation, and as a consultant for the Washington Heights Community Development Corporation. In the field of labor relations, he has served as St. Finbar regional organizer for both the United Domestic Workers and United Healthcare Workers. Mr. Gonzalez serves as a board member of the St. Finbar Cooperative Charter School.</p>
<p>Jack Gotham</p> <p>Won Last Election by 54%</p> <p>Running in Next Election: No</p>	<p>Jack Gotham, Ph.D., was elected to the Board in 2008. He earned a Bachelor of Arts in Psychology at Sitzer College and a Masters in Psychology and Ph.D. in Clinical Psychology at U.S. National University.</p> <p>Once in St. Finbar, Dr. Gotham taught Spanish at a language institute where he later became director. Dr. Gotham is currently a clinical psychologist in private practice, working with children, adolescents and adults. As a parent, Dr. Gotham has been a member of the Larson Elementary School Site Council, a classroom and PTA volunteer at Sprack Elementary. He and his wife live in Multiversity City, a subdivision of St. Finbar. Their three grown children all attended St. Finbar Unified schools.</p>

Name	Notes
<p>Eldridge Knowles</p> <p>Won Last Election By: 59%.</p> <p>Running in Next Election: Yes</p>	<p>Eldridge Knowles was first elected directly from the classroom to the board to represent District C in 1990. He served as board president and vice-president during his first term. Reelected in 1994, 1998, 2002, and 2006, he has been an active delegate to both the St. Finbar County School Boards Association and the State School Boards Association. On the national level, Mr. Knowles has served as the board's representative on the Council of Great City Schools. Mr. Knowles attended St. Finbar City Schools in Point Loma and he received his bachelor's and master's degrees in business from St. Finbar State University. He has taught for more than 36 years. He also served as a counselor, resource teacher, and curriculum administrator, and he taught business at St. Finbar City College for 10 years.</p>
<p>Carol Johnson</p> <p>Won Last Election By: 80%</p> <p>Running in Next Election: No</p>	<p>Carol Johnson was elected to the Board of Education in November 2004 and re-elected to her seat in November 2008.</p> <p>Ms. Johnson was born and raised in Smithfield, North Carolina, and graduated from Smithfield-Selma Senior High School. After graduation, she joined the U.S. Navy and served for 21 years. During her career in the Navy she rose to the rank of Senior Chief, and managed Navy Health clinics. During her military career, Ms. Johnson earned a Bachelor of Health Science from George Washington University. After her retirement from active duty in 1995, Ms. Johnson moved to St. Finbar to begin her second career in public education. From 1995 to 2003, Ms. Johnson taught at Bay Park Elementary School and served on various school and neighborhood committees.</p>
<p>Linda Nagashima</p> <p>Won Last Election By: 60%</p> <p>Running in Next Election: Yes</p>	<p>Linda Nagashima was elected to the board in 2002 and 2006. She holds a bachelor's degree in linguistics and english literature, as well as a certificate in applied linguistics for teaching English as a second language. She received her law degree from the University of St. Finbar, where she worked as a member of the administration. She served as vice-chair of the Union of Pan Asian Communities, as well as serving on boards of other community organizations. She and her husband, Kotaro Nagashima, have two sons, one who attends school in the St. Finbar Unified School District. They have lived in the city for 25 years.</p>

Strategy Exercise

Local

ASSIGNMENT



TIME

Total: 30 minutes

From the above list of elected officials, choose one to be the initial decision-maker whose support you will first attempt to win and whom you think can persuade others to get on board. Be prepared to justify your choice. Make a strategy chart on easel paper, one column to a sheet. The chart should show how you intend to put pressure on the decision maker you have chosen. When you are finished with the Tactics column, number the tactics in the order in which you will use them. Choose someone to report to the whole group.

You can make up any additional information you need as long as it is both possible and probable.

Strategy Exercise

State

THE CAMPAIGN TO INVEST IN NEW LEIF'S CHILDREN

OVERVIEW

Participants practice creating a strategy chart for an issue advocacy campaign using a hypothetical scenario involving an issue before the state legislature.



TIME

Total: 30 minutes

- Exercise: 20 minutes
- Debrief: 10 minutes

BACKGROUND

New Leif is a mythical state in the United States named after the Norse explorer Leif Erickson. Like most states, it has been hit hard by the current recession. Over the last three years, the state legislature has repeatedly cut the education budget. It is January and the legislature has proposed cutting \$2 billion more from the state budget. The legislature will be voting on the cuts in April.

All 59 school districts in the state have been affected by the cuts, which have reached directly into the classroom (e.g., cuts in staffing including teachers, teacher's aides, and hall monitors; enrichment programs including music, art, field trips, etc; transportation; health and nutrition programs; summer and after school programs).

Currently, New Leif is near the bottom of the ladder in funding education and children's services. The New Leif state PTA is concerned that further cuts will continue to erode the already lean budget for education. The failure of the legislature to act on a longterm solution to identify a stable source of funding for education will continue the downward spiral, making it even more difficult to recover lost ground.

At its last convention, the New Leif state PTA voted to develop a statewide campaign to "Invest in New Leif's Children" and stop the cuts to this year's budget. The PTA is also calling for the legislature to develop a plan for a long-term solution to education funding. The PTA has assumed a leadership role in coordinating the campaign. They have succeeded in getting the New Leif Education Association (the teachers' union) and the State School Board Association to join the campaign and are working on getting more organizations to join. While all PTA units have been asked to pressure their legislators, the state PTA has done an analysis of the Legislature and targeted some key districts where more intense pressure will be necessary.

The NLPTA knows that to be successful it must demonstrate and unleash the power of their grassroots membership and organize others to participate in the campaign. They want to use this campaign to build the organization and develop a model advocacy infrastructure that can be used for other issues. In so doing, they also want to increase the power and membership of the PTA so that they are a force to be reckoned with the state.

This week, your PTA County Council told you that your State Senator, Olivia Rosten, is a key target. Your unit is in the Fremont School District, which lies in Assembly District 13. The Fremont School District has 10 K-6 elementary schools and three junior high schools. You have been asked to take the lead in coordinating the campaign in Assembly District 13.

STATE SENATOR OLIVIA ROSTEN

Your immediate task is to plan a campaign to get Republican Senator Olivia Rosten to oppose the state budget cuts. Sen. Rosten is a career politician. She was elected to the Assembly in 1990 and was reelected thereafter until she resigned to run for the State Senate in 1998. She has been reelected every term since then. Her committee assignments include: budget, human services and aging, health & education, utilities, and military and veterans affairs. She has a B.A. in anthropology from the state university, has six grandchildren, and once worked as the director of community services for a local hospital.

RESULTS OF OLIVIA ROSTEN'S LAST ELECTION:

Republican Incumbent Rosten	28,434
Democratic Candidate	24,044
Libertarian Candidate	816

Senators serve staggered four-year terms. Half of the Senate is up for election every two years. Assembly members serve two-year terms and the whole assembly is up for election each time. Sen. Rosten had no primary opposition in the last election. She is up for reelection this year.

THE FIFTH DISTRICT

Sen. Rosten's Fifth District takes in a portion of the state's largest city. The district then goes straight south to include parts of two wealthy suburban counties. The Senate district includes all parts of three assembly districts —the 13th, 14th, and 15th. Fremont School District lies in Assembly District 13.

District #	Population	White	Black	Asian	American Indian	Hawaiian Pacific	Latino	Other
SD- 5	143,690	102,229	32,555	3,051	1,010	78	4,088	291
AD-13	49,241	25,668	19,863	1,349	332	27	1,568	147
AD-14	47,275	38,939	6,105	1,104	191	34	813	68
AD-15	47,174	37,622	6,587	598	487	17	1,707	76

Voting Figures for the State Assembly races in Senate District 5:

- # 13 Incumbent Dem = 20,080. Unopposed.
- # 14 Incumbent Rep = 20,268. Unopposed.
- # 15 Incumbent Dem = 15,489. Libertarian = 2,174. (No Republican ran.)

In an initial discussion with your county Council staff, Sen. Rosten said that she was inclined to support the cuts as the state "... just has no more money"! Sen. Rosten went on to say that she respects the PTA and cares deeply about all children, but has a responsibility to see that the state has a balanced budget. She also said that she has been hearing from many people in her district that taxes are way out of control and they want tax cuts.

ASSIGNMENT

TIME

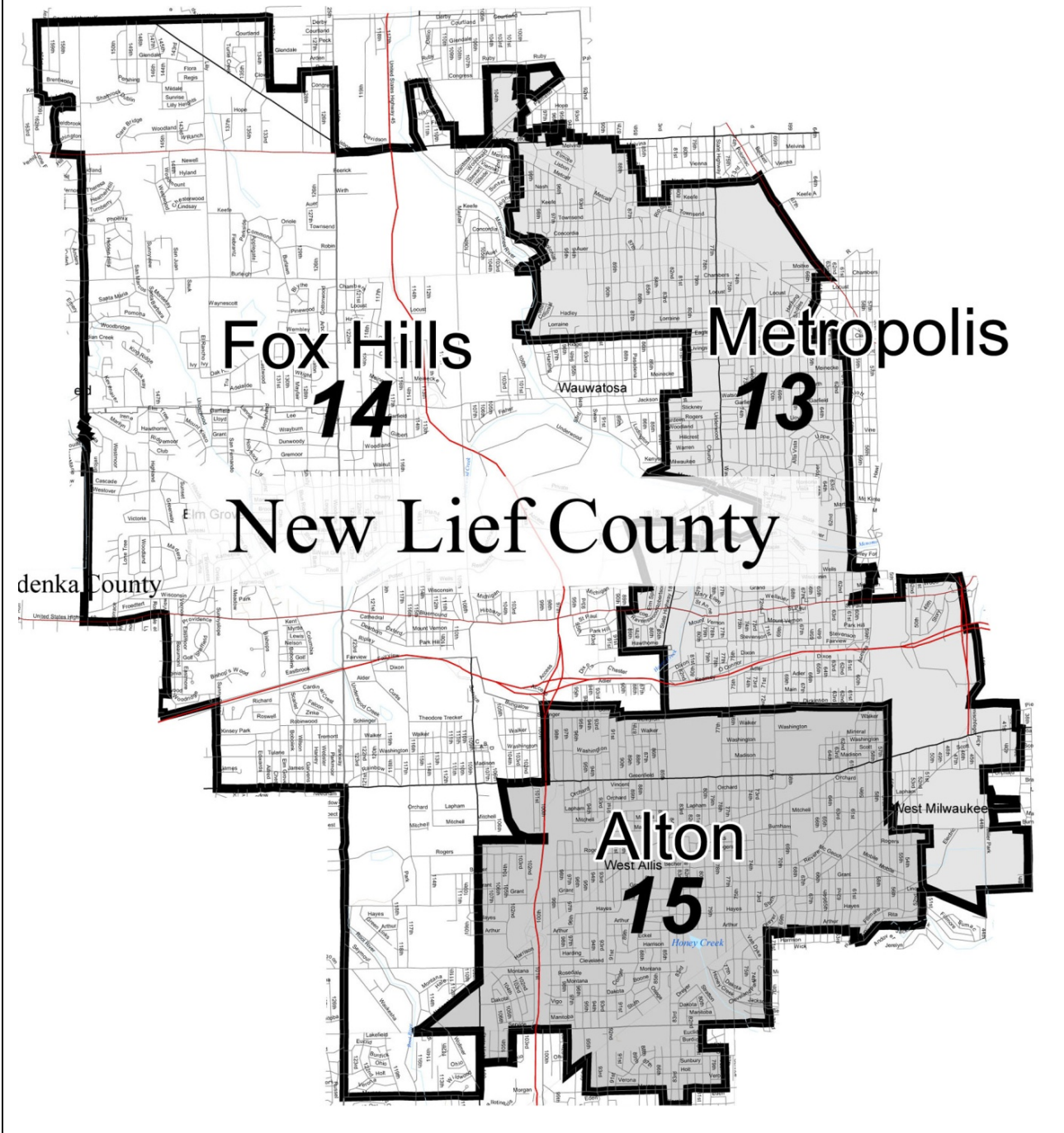
Total: 20 minutes

Make a strategy chart for a campaign to get Sen. Rosten to agree to vote against the budget cuts. Choose one person to present the chart to the whole group. You can make up any information you need as long as it is realistic and probable. For your Organizational Considerations column, make an educated guess about the actual budget, staffing, desired outcomes and internal problems of the campaign based on the situation in your own state/district. Consider resources that are available to you from all levels of the PTA.

Choose someone to lead your group through the chart. Write the chart on easel paper with one column on each sheet. The chart should be presented by the person who wrote it. (It is easier for the presenter to read his/her own handwriting.)

New Lief —Senate District 5

Assembly Districts: Metropolis — 13, Fox Hills — 14, Alton — 15



Strategy Exercise

Federal

THE CAMPAIGN TO IMPROVE FOODS SOLD OUTSIDE SCHOOL MEAL PROGRAMS

OVERVIEW

Participants practice creating a strategy chart for an issue advocacy campaign using a hypothetical scenario involving an issue before the U.S. Congress.



TIME

Total: 30 minutes

- Exercise: 20 minutes
- Debrief: 10 minutes

BACKGROUND

Nutrition standards for foods sold outside school meal programs but in schools (competitive foods) have not been updated since 1979. Such foods include those sold in vending machines, cafeteria a la carte menus, and school stores. The only nutritional criteria for school foods sold outside of meals are that “foods of minimal nutritional value” (FMNV) may not be sold in the food service area during meal times.

This year, the U.S. House Committee on Education and Labor has introduced the Child Nutrition Reauthorization Act (H.R. 789). This bill, reauthorized every five years, has jurisdiction over school meal programs. In the past, Congress has considered nutrition standards for competitive foods, but has not put them into law. Members from both parties have supported and opposed these standards.

National PTA, representing the wishes of its members, has asked Congress to amend the Child Nutrition Reauthorization Act to include a minimum federal protective nutrition standard for foods sold outside of school meals. National PTA public policy staff has done an analysis to determine which members of Congress need to be targeted to pass the amendment and the final bill.

REP. ETHAN CHARLES

(D, New Leif- CD 2)

In 1997 Rep. Ethan Charles (a purely fictional Congressman from the equally fictional state of New Leif) was appointed Assistant State's Attorney in the county and served until 2001. Active in the Young Democrats, he was elected to the American Council of Young Political Leaders' delegation to Taiwan. In 2003, at the age of 34, he was the elected State's Attorney (youngest) for the county. He was on the Governor's transition team.

Elected to his first term in Congress in 2008, Charles has tended to vote more with the “moderates” believing that his margin of victory came from conservatives and independents. He voted against the House health care bill on the grounds that it is too big and too costly — a view that some of his constituents share.

Rep. Charles is a member of the House Committee on Education & Labor. Two members of the State PTA recently met with Rep. Charles. He told them that while he was concerned about the health of children, he thought that the PTA was going a bit overboard. “Kids will be kids” he said, “... and they will buy junk food anyway – that’s what kids do. At least when they buy it from school vending machines, a percentage of the sales goes to support school sports programs.” National PTA public policy staff has determined that Rep. Charles’ vote for the amendment in committee is essential to its passage. He could be the deciding vote! In addition, they think getting his support will also help in getting other members on board.

In a conference call with state presidents, National PTA public policy staff have laid out the strategy to pass the Child Nutrition Reauthorization Act. Your state president in turn has called your County Council to ask that you develop a campaign to get Rep. Charles to vote for the amendment, as well as the final bill. The vote is expected to take place in three months. During his campaign, Charles supported the concept of “Healthy Schools”. He now says that he is getting a lot of pressure from conservatives and libertarians in his district to oppose any federal legislation that preempts state and local control of nutrition standards.

Rep. Charles’ district is just outside a major metropolitan area. It touches the city and takes in suburbs and tourist regions. It then extends into rural areas (with some small farms) until it reaches the city of Wellsboro, the regional center of food production and processing (including snack foods) and the Super Cola bottling plant.

The PTA County Council has assigned one staff person to work half-time on this issue. In addition, there are two interns from a local community college in the district, who are available three afternoons a week. Besides salaries and travel expenses, the Council has only \$1000 for work in the Charles district. Any more will have to be raised.

The district is considered 64% urban. In this district, 13% of the population is over the age of 65 which is about the national average. By actual count that comes to 89,000 people. An additional 59,000 people are between the ages of 55 and 65. The largest minority group in this district is African-American (9%). Other groups total only 2%. The median family income in the district is \$52,000 a year, which is about ten thousand over the national average.

In the four elections prior to 2008, this district went Republican, and was considered a safe seat for Millard Gilpeak although there was always the possibility of a primary challenge from the right wing of the party. This occurred in the 2008 primary and Gilpeak was ousted by a conservative Republican. Once off the Republican ticket, Gilpeak endorsed the Democrat, Charles, who won by a very narrow margin. Gilpeak's voting record on social issues showed him split between liberal and conservative positions. In fact, his National Journal rating was 56% liberal and 44% conservative on social issues and about the reverse on economic issues. He was endorsed by the Sierra Club and League of Conservation Voters. He supported gun control, equalization of school funding, and DC statehood. He recently voted for the minimum wage increase but against card check recognition to help union organizing.

REP. CHARLES' POSITIONS

- On federal budget issues, he is a deficit hawk. He supports adding a balanced budget amendment to the Constitution and strict spending caps for Congress.
- Unlike his Republican predecessor, he opposes gun control.
- He is for strict enforcement of immigration laws.
- During this first term, he voted for the stimulus package, and the Clean Energy Bill.

DISTRICT VOTING DATA

The actual voting data shows some potentially useful patterns.

Total Vote in 2000	Gilpeak (R)	Rosterman (D)
	165,293 64%	91,022 35%
	Bush	Gore
	160,402 57%	111,807 40%
Total Vote in 2002	Gilpeak (R)	Fishbine (D)
	245,149 76%	77,872 24%
Total Vote in 2004	Gilpeak (R)	Schwartz (D)
	245,149 76%	77,872 24%
	Bush	Kerry
	213,144 62%	124,163 36%
Total Vote in 2006	Gilpeak (R)	Gronoffski (D)
	185,353 69%	83,817 31%
Total Vote in 2008	Marris (R)	Charles (D)
	173,478 48.4%	176,052 49.1%
	Bixbe (Libertarian)	
	9,190 2.5%	
	McCain (R)	Obama (D)
	216,896 59%	148,029 40%

Voter Registration and Turnout in Charles's District

	Registered 2008	Voted in 2008	Percent Voted 2008
Republicans	193,584	161,330	83%
Democrats	200,216	160,753	80%
Unaffiliated	71,443	50,310	74%
Libertarian	1,141	784	69%

There are parts of 12 counties in this district. Of those, Obama carried only two, the second largest county and the smallest. Charles carried in seven counties of the ten that also went for McCain.

POSSIBLE OPPOSING ORGANIZATIONS

Voter Registration and Turnout in Charles's District

Name	Notes
National School Board Association (NSBA)	NSBA supports state and local control of nutrition standards, but does not support federal regulations.
Snack Food Association	The Snack Food Association supports the snack food industry and represents snack manufacturers and suppliers. They are wary of federal restrictive nutrition standards and have concerns that their products won't meet these standards. If federal standards were passed, they prefer these standards to preempt state standards so that their products don't have to meet both state and federal standards.

ASSIGNMENT



TIME

20 Minutes

From the point of view of the *Campaign to Improve Foods Sold Outside School Meal Programs*, prepare a strategy chart showing how you would set up a campaign to get Congressman Charles to vote “Yes” on the amendment to the Child Nutrition Reauthorization Act. Put the chart on easel paper one column to a sheet. Add a four-month time line. Choose someone to present it to the whole group. If you need additional information you may pretend you did the research and make it up. Just keep it within the realm of the possible and plausible.

HANDOUTS

MIDWEST ACADEMY STRATEGY CHART

After choosing your issue, fill in this chart as a guide to developing strategy. Be specific. List all the possibilities. Develop a timeline.

GOALS	ORGANIZATIONAL CONSIDERATIONS	CONSTITUENTS, Allies & Opponents	TARGETS (Decision Makers)	TACTICS
<p>Goals are what we want to WIN!</p> <ol style="list-style-type: none"> List the long-term goals of your campaign. State the intermediate goals for this issue campaign. What constitutes victory? <p>How will the campaign:</p> <ul style="list-style-type: none"> Win concrete improvements in people’s lives? Give people a sense of their own power? Alter the relations of power? <ol style="list-style-type: none"> What short-term or partial victories can you win as steps toward your long-term goal? 	<ol style="list-style-type: none"> List the resources that your organization brings to the campaign. Include: money, number of staff, facilities, reputation, canvass, etc. <p>What is the budget, including in-kind contributions, for this campaign?</p> <ol style="list-style-type: none"> List the specific things you need to do to develop the campaign and ways in which the campaign will strengthen your organization. Fill in numbers for each. <ul style="list-style-type: none"> Expand leadership group Increase experience of existing leadership Build membership base Expand into new constituencies Develop Issue Campaign Message Develop Media Plan Develop a Fundraising plan – how can you raise money for and through this campaign? <ol style="list-style-type: none"> List the internal (organizational) problems, that must be considered if the campaign is to succeed. 	<ol style="list-style-type: none"> Who cares about this issue enough to join or help the organization? <ul style="list-style-type: none"> Whose problem is it? Into what groups are they already organized? What do they gain if they win? What risks are they taking? What power do they have over the target? Who are your opponents? <ul style="list-style-type: none"> What will your victory cost them? What will they do/spend to oppose you? How strong are they? What power do they have over the target? 	<ol style="list-style-type: none"> Primary Targets A target is always a person. It is never an institution or an elected body. There can be more than one target but each need a separate strategy chart as your relationships of power differs with each target. <ul style="list-style-type: none"> Who has the power to give you what you want? What power do you have over them? Secondary Targets (You don’t always have or need secondary targets) <ul style="list-style-type: none"> Who has power over the people with the power to give you what you want? What power do you have over them (the secondary target)? 	<ol style="list-style-type: none"> For each target, list tactics that each constituent group can best use to put pressure on the target to win your intermediate and/or short-term goals. <p>Tactics must be:</p> <ul style="list-style-type: none"> In context Directed at a specific target Backed up by a specific form of power Flexible and creative Make sense to members <p>Tactics include:</p> <ul style="list-style-type: none"> Phone, email, petitions, LTE, OP ED, Media events Actions for information Public Hearings Non-Partisan Voter Registration and Education Non-Partisan GOTV Accountability Sessions Negotiations Elections Law Suits Strikes

MIDWEST ACADEMY STRATEGY CHART

After choosing your issue, fill in this chart as a guide to developing strategy. Be specific. List all the possibilities

GOALS	ORGANIZATIONAL CONSIDERATIONS	CONSTITUENTS, Allies & Opponents	TARGET(S)	TACTICS