

Module 7: Meetings To Pressure Decision-Makers



GOALS

By the end of this module, participants should be able 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: 60 minutes

- 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

- PowerPoint printout
- Checklist for Meetings with Decision Makers
- Meeting with Decision Makers 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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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 7: MEETINGS TO PRESSURE DECISION-MAKERS



SAY

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

Has anyone participated in a meeting to pressure a decision-maker? Pick someone to describe the meeting she/he was in. Look for a clue about who to ask when you do 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 bringing information to an elected official or asking about the official's position, but not applying 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.

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

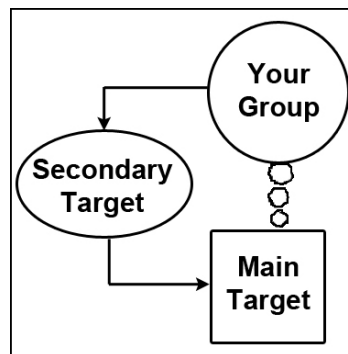
- It is not simply asking, nor is it trying to convince by logic. We have tried those things and failed long before we get to the action stage of the campaign. If, in the beginning of a campaign, we ask for something and get it easily, we assume that we asked for too little. Much later, after the organization 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



INSTRUCTOR NOTE

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



SAY

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.

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.

GET OUTSIDE THE EXPERIENCE OF THE TARGET



INSTRUCTOR NOTE

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



SAY

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 daycare 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 daycare. 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.

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.

WHAT THE ORGANIZATION GETS OUT OF REGULAR MEETINGS

- **Victories** — Celebrate them!
- **Commitment** — Our volunteers can see the organization working for them and understand what it does.
- **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 some thing 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.
- **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 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.
- **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.
- **Publicity** — We often get publicity, which builds membership and fundraising potential.
- **Leadership** — Actions are a good opportunity to build our leadership.
- **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.

FOUR STEPS TO PLANNING THE ACTION

There are four steps to planning the action.



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

1. PREPARING FOR THE MEETING



SAY

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.



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

Ask what do we have that the decision-maker wants? What can we do or 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?



SAY

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.

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/her if made before the media.

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.

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.

Showcase Power, Not 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, tell him/her that voters know you are right about this issue. This is how being right really gives you power.

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 ensure that the group is saying supporting lines and hasn't drifted off into acting as if they were watching all of this on TV.



SAY

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.

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.

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 she/he comes back sometimes speeds thing up.
- Post demands on the 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.



SAY

When the Target Says No:

- 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." She/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.
- 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.)
- Suggest talking it over at the target's house.
- 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/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.

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.

Put the Agreement In Writing

If an agreement was reached, quickly state it in a letter to the target. "Thank you for your agreement to the following terms." 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.

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.



INSTRUCTOR NOTE

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

Checklist For Planning a Meeting With an Official (At His or Her Office or "Turf")

All Levels

- Will your action be based on real power? Will it be fun?
- Is everyone in your group comfortable with the plan? (Is it within the experience of your group?)
- Will the plan be outside the experience of the target?
- Are your demands clear and simple?
- Do you have several fallback demands?
- Do you have an appointment?
- Have you scouted the building and made a floor plan? Do you know where to find:
 - Elevators and stairs
 - Bathrooms?
 - Parking or nearest transit stops?
 - The target's office?
 - "Hot spot" where your cell phone works - or a pay phone?
- Can the site accommodate disabled members?
- Has the group selected who will present information at the meeting? Are people prepared for their roles?
- Has the group selected who its spokesperson for the action?
- Have you held a dress rehearsal for the spokesperson and the participants?
- Have you calculated how you will demonstrate your power? Do you plan to have symbols with you (letters, petitions)?
- Do you have a good turnout plan for the action, including last-minute reminder phone calls?
- If you want the media, have they been notified? Have you...
 - Sent a press release, including a notice of your photo opportunity, a week ahead of time?
 - Called the daybook a week ahead of time?
 - Called and emailed the assignment editors the day before the action?
 - Prepared a release for distribution on the day of the action?
 - Assigned someone to talk with the media at the event? (your spokesperson may be busy)
- Have you selected someone to take notes during the meeting and write the confirmation letter to the target?
- Do you know who will debrief the action with participants and where the debriefing will occur?

Meetings Exercise

Local

THE ST. FINBAR EDUCATION COALITION MEETS WITH LINDA NAGASHIMA

OVERVIEW

Participants practice winning the support of an elected official.



TIME

Total: 30 minutes

- Exercise: 20 minutes
- Debrief: 10 minutes

The St. Finbar Education Coalition has been conducting a campaign to reverse the decision to cut bus transportation to all magnet schools in the district. After meeting with individual school board members, you have determined that Hubert Gonzalez is in favor of reversing the decision to cut the bus service and is willing to make the proposal to the school board. At this point two board members are opposed and two are undecided.

Linda Nagashima is undecided. She has agreed to meet with a delegation from the St. Finbar Education Coalition to discuss the issue. Nagashima is very concerned about her next race, which is in November.

POSITION OF ST. FINBAR MEMBERS ON REINSTATING BUS SERVICE

	School Board Member	Position
1	Hubert Gonzalez	In Favor
2	Jack Gotham	Opposed
3	Eldridge Knowles	Undecided
4	Carol Johnson	Opposed
5	Linda Nagashima	Undecided

ASSIGNMENT

You have 20 minutes to plan your meeting with School Board Member Linda Nagashima who has agreed to meet at the school district office in one week. Determine whom you will send from the coalition and who will be the spokespeople at the meeting. What power do you have over Ms. Nagashima?

After planning, you will have a mock meeting with Board Member Nagashima in which you must convince her that she has more to gain by supporting the proposal than opposing it.

You may make up whatever information you need but keep it within the realm of the possible.

Meetings Exercise

State

THE FREMONT PTA MEETS WITH SENATOR OLIVIA ROSTEN

OVERVIEW

Participants practice winning the support of an elected official.



TIME

Total: 30 minutes

- Exercise: 20 minutes
- Debrief: 10 minutes

BACKGROUND

The Fremont PTA and its coalition partners have been conducting a campaign to stop the funding cuts to public schools in the state. At a recent meeting with a few PTA members, State Senator Rosten refused to take a position on the funding cuts. She claims she is torn about what to do. She wants to uphold her reputation for being fiscally responsible.

State Senator Rosten is truly undecided. She has agreed to meet with a delegation from the campaign to discuss the issue. Rosten is very concerned about her next race, which is in November. You have been informed that the vote will take place in one month.

ASSIGNMENT

You have 20 minutes to plan your meeting with Sen. Rosten who has agreed to meet in her district office in two weeks. Determine who you will send from the coalition and who will be the spokespeople at the meeting. What power do you have over Sen. Rosten?

Use the Checklist For Planning a Meeting With an Official pages of this handout to help your preparation.

After planning, you will have a mock meeting with Sen. Rosten in which you must convince her that she has more to gain by supporting the PTA and its allies and opposing the funding cuts.

If there is information you need but don't have, pretend you did the research and make it up. But keep it within the realm of the possible.

Meetings Exercise

Federal

THE PTA COUNTY COUNCIL MEETS WITH CONGRESSMAN ETHAN CHARLES

OVERVIEW

Participants practice winning the support of an elected official.



TIME

Total: 30 minutes

- Exercise: 20 minutes
- Debrief: 10 minutes

BACKGROUND

The county council and its coalition partners have been conducting a campaign to amend and pass the Reauthorization of the Childhood Nutrition Act. At a recent meeting with PTA members, Representative Charles said even if he voted for the Reauthorization Act he is concerned that the amendment to regulate competitive foods would be an example of government getting involved in something in which it should not be involved. He repeated the comment he made recently on a radio show that parents should be teaching their children how to make nutritious choices.

While Rep. Charles has been indicating that he will not vote for the amendment, you have heard that he is really worried about his upcoming election. He has said that he has to pay attention to libertarians in the district as he thinks they were the margin of victory in his election. He has agreed to meet with a delegation from the PTA and others in the coalition to discuss the issue. Charles is very concerned about his next race, which is in November. You have been informed that the vote on the amendment will take place in one month.

ASSIGNMENT

You have 20 minutes to plan your meeting with Rep. Charles who has agreed to meet in his district office in two weeks. Determine who you will send from the coalition and who will be the spokespeople at the meeting. What power do you have over Rep. Charles?

Use the Checklist For Planning a Meeting With an Official to help your preparation.

After planning, you will have a mock meeting with Rep. Charles in which you must convince him that he has more to gain by supporting the PTA and its allies and voting for the amendment.

If there is information you need but don't have, pretend you did the research and make it up. But keep it within the realm of the possible.