

ORGANIZING TOOLKIT

Artful Activism for the Progressive Movement



● The Backbone Campaign's Artful Activism invigorates a populism that appeals to the best in people, amplifies citizen engagement, and helps deliver victories for communities on issues that make a real difference in people's lives.

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Table of Contents

<i>Running Effective Meetings</i>	1-2
<i>Planning Your Action</i>	
Goal of the Action	3 - 4
The Who, When, Where and How of your Action	4 - 5
Tactic Star Action Planning Tool (List)	5
Tactic Star Action Planning Tool (Graphic)	6
<i>Affinity Groups</i>	
Defined and their History	6
Tips on Starting Your Own Affinity Group	7
<i>Action Logistical Roles for your Affinity Group</i>	8
<i>Action Planning Checklist & Timeline</i>	10 - 11
<i>Know Your Rights</i>	11 - 13



How to run an effective meeting:

Meetings can make or break you and your group. If your meetings are well prepared and facilitated they will help strengthen and grow your group. If your meetings are poorly planned and/or run, it will be hard for your group to grow, reach its goals and get people to return to your next meeting. Below are some tips on how to run an effective meeting.

Key Items for Effective Meetings

- Have a prepared agenda.¹
- Have specific goals and objectives.
- Roles (facilitator, timekeeper, note taker/vibes watcher) should be all recognized and should be accepted by all participants.
- Either in advance, or upon the start of the meeting, review the agenda, time allocated for each agenda item, and goals for the meeting. Solicit feedback on any needed changes before commencing the meeting.
- Stay within agenda times for specific items. If you can't, acknowledge that and ask for more time for that item.
- Encourage everyone to participate.
- Everyone's ideas should be heard; you should encourage sharing of ideas.
- Have a comfortable place to meet.
- Snacks and water help.
- If possible, agreements are reached by consensus.
- Criticism is frank and constructive without personal attacks.
- Get everyone in your group trained in facilitation skills.
- Bring sufficient pens and paper.

Before the Meeting

- Define the goals of the meeting. Make sure they are realistic.
- Make sure the goals can be accomplished in one meeting. It is better to have two meetings than one long meeting where people burn out and can't wait to get out of the meeting (though sometimes we do need longer meetings).
- Develop an agenda with what it is you are working on, what you need to get out of the agenda item and time frames for each agenda item.
- Choose a facilitator in advanced so they can prepare.
- Email the facilitator any agenda items you might have before the meeting so they can prepare.
- Choose a space that will comfortably fit the number of people you want at the meeting, with minimum distractions.

¹ An agenda is a list of items that your group needs to cover/discuss in order to make make strategic decisions for your group. Each item should have set time limits.

Conducting a Meeting

- Start on time.
- Everyone should introduce themselves.
- Discuss logistics (for example: breaks, restroom, or anything else that people might need to know) and group agreements around participation/Ground Rules.
- Follow the agenda to accomplish the desired purpose.
- Make sure everyone participates, it is key to make sure that everyone speaks creating group ground rules can help with things like “set up/step back” Ask yourself W.A.I.T (Why Am I Talking) often the people that have been most silent during a meeting have the most to offer.
- Facilitate² the discussions.
- Strive to achieve consensus³.
- Accurately capture commitments, record on big paper.
- Make sure everyone at the meeting knows the process and the hand signals that your group uses.
- Pick roles - timekeeper, notes taker and vibes watcher, additionally sometimes you might want two facilitators.
- Take breaks if you need it to stretch or eat, particularly in longer meetings.

Before You Leave the Meeting:

- Go over the decisions made.
- Have everyone state what they took on and when it needs to be done by. It is great if you can write this up for everyone to see (this will help with workload and fairness in your group dynamics).
- Set up next meeting times, dates, and purpose, if needed.
- Pick the next facilitator and make sure they have the notes.
- Check in to see how the meeting was for people - was it effective, are there areas where you can improve, etc. This should be done occasionally to improve your group’s process, not at every meeting.
- Thank people for coming and taking on task or roles.

Follow-up

- Have action items, tasks, people, and times clearly identified and if appropriate email that out to the group with the notes.
- Create a system to check on progress of different work people took on.

² Facilitate means to “make easy”. There are many duties of a facilitator; the first is to be objective. The goal of the facilitator is to guide a group through its agreed-upon agenda, to make sure that everyone participates, and to help the group get to its desired state.

³ Consensus is...

- Debrief⁴ the meetings like you would an action; make sure the process you are using is working for your group.
- Have someone follow up one-on-one with new people from the meeting.

Planning your Action!

There are a lot of great workshops to take on action planning and this doesn't replace those. But this list should help you get started.

Steps to Action Planning:

- 1 WHY?** Why do you want to have an action? Determine your **Goal** (anticipated result of the direct action). Below are some reasons for using direct action:

- **Make the invisible visible**

This type of direct action is meant to shine a light on something hidden or not known yet by the public. There are a lot of issues that we work on that have not made it to the public eye yet. Or if your campaign still has not made it to the mainstream's mind yet or they don't understand what you are working on, you can plan an action to clearly define what it is you are working on, trying to stop or expose.

- **ESCALATION**

This is key: we want to keep the people, governments, and businesses we are targeting on their toes! We can't afford to get predictable. You always want to leave room to grow and have your next move in mind. Don't go too big too fast and burn out your group. You are going to want a firm understanding of your target to understand the best way to escalate.

⁴ Debriefing is something that is recommended after we do anything. This action is what allows us to grow, evolve and ultimately become more effective. A debrief should happen when everyone in your group can be present (sometimes this doesn't work out to get everyone there but that is ideal). Make sure that everyone has a chance to talk. The key questions to ask are:

- 1 What worked well at the meeting or event or action?
- 2 What did not feel good or go as expected?
- 3 What do you think we can do next time to fix or improve X, Y or Z?
- 4 What were our goals for that meeting? Did we reach them?
- 5 How was the group process? How was the facilitation?

The ability to always escalate demonstrates to your target your commitment to stick to the issue and your ability to grow. So for example if you have only been writing letters to your target you can escalate by having a rally at their office. If at the last rally you had 7 people the next one you come back with 19 then they see that you are growing. If however at the next protest you feel like you might only have 9 people then you need to do something different, otherwise it looks like your efforts are fading. So you can bring the protest inside their offices or drop a banner or do an action at their country club.

- **Team Spirit/Morale**

Sometimes burn out sneaks up on us, or you have suffered a setback in your work or it just doesn't feel like victory is in sight, or your numbers are dwindling. Direct action can serve to raise the spirits and renew the energy of the group it can also help inspire others to join your group. Direct action can be fun and help empower others to find their strength.

WHAT IS THE ACTION? This should start as a group brainstorm. Brainstorming is a free exchange of ideas in a space that has no judgments. Throw out as many ideas as you can; there are no bad ideas in a brainstorm. You will need to know the history of the campaign so you can pick the right level of escalation for your group. You will also need to know who has the ability to create the change you want to see. Targets should have the power to stop or change something.

Who:

- Who do you need to work with to pull this action off (roles of an affinity group)?
- What groups do you want to support your action?
- Who is the target of your action?

When: When do you need to have the action? Is the date set (i.e. is it an anniversary or is the date flexible?) and are you giving yourself enough time to organize this well? Also keep in mind the time of day and what day. If you want to confront a CEO of a company make sure you plan your action during their work hours.

Where: Is the location set? Or do you have many options? If it is not set ask yourself what is the goal of the action? If it is to send a direct message to your target, then make sure you are somewhere where they can hear you, such as their office, home, board meeting etc. Please read Smart memes [*DE-COLONIZING THE REVOLUTIONARY IMAGINATION*](#). This will help you figure out where you want to have your first action.

Direct actions can happen in six arenas--at the point of decision, destruction, production, consumption, assumption and potential. Understanding who your target is and what is important to them and mapping out all the areas that influence your target will help you understand where to have your actions.

Make sure you send at least 2 people to go recon the site to help your group come up with the best plan. They should be able to draw out a map of the area and explain what they saw to the group. More on recon below.

How: How many people do you need to do that action, what gear or resources are needed, will you need to bring food and water, etc.

The tactic star, developed by Beyond the Choir, is a great tool for action planning.

Tactic star:

Beyond the Choir :: The Tactic Star (a tool for planning and evaluating tactics)

Strategy: How will the tactic move us toward achieving our goal?

Message: What will the tactic communicate? What will it mean to others? How will it carry a persuasive story?

Tone: Will the action be solemn, jubilant, angry, or calm? Will the energy attract or repel the people we want to engage?

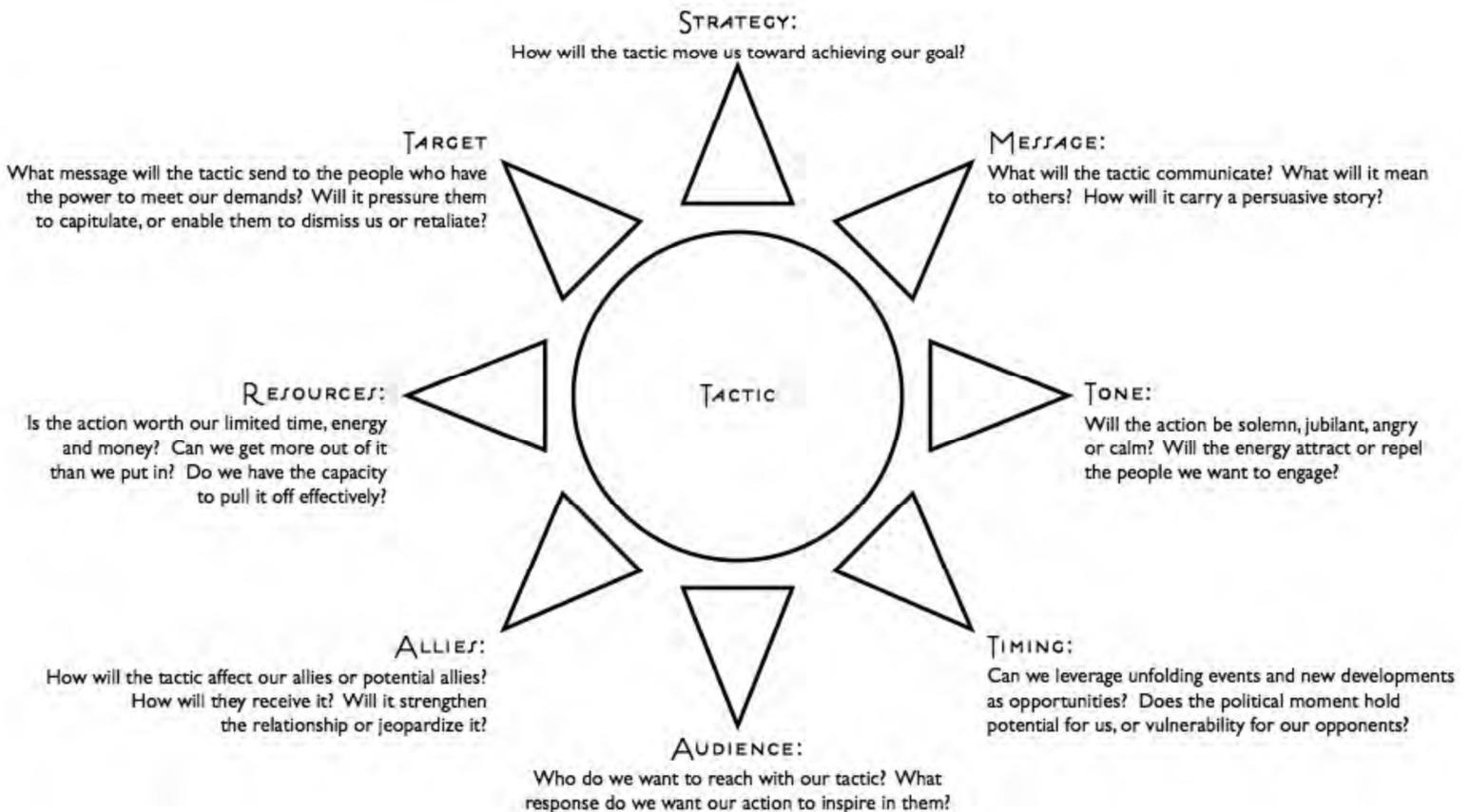
Timing: Can we leverage unfolding events and new developments as opportunities? Does the political moment hold potential for us, or vulnerability for our opponents?

Audience: Who do we want to reach with our tactic? What response do we want our action to inspire in them?

Allies: How will the tactic affect our allies or potential allies? How will they receive it? Will it strengthen the relationship or jeopardize it?

Resources: Is the action worth our limited time, energy and money? Can we get more out of it than we put in? Do we have the capacity to pull it off effectively?

Target: What message will the tactic send to the people who have the power to meet our demands? Will it pressure them to capitulate, or enable them to dismiss us or retaliate?



What is an Affinity group?

History of Affinity Groups:

Affinity groups come out of the anarchist and workers movement that was created in the late 19th century during the Spanish Civil War. Small circles of good friends, called "tertulias" would meet at cafes and other places to discuss ideas and plan actions together.

Affinity groups are still being used today for everything from tree sits and road blockades to mass actions like the WTO.

An affinity group is a small group of about 5 to 16 people who work together autonomously on direct actions or other common projects. They can come together for a very short time like organizing an action for a specific event (WTO) or objective which could be for a longer period of time (keep the forest vertical). They should have a common goal. You can form an affinity group with your friends, people from your community, workplace, or organization. Ideally they have a high level of trust.

Affinity groups usually work by consensus thereby challenging top-down decision-making and organizing models. This also creates some of the most creative actions because everyone is invested in the action equally. Affinity groups by nature are decentralized which makes it harder for the cops/feds to track what we are doing.

Tips on starting a affinity group

- Talk with your friends/people you are working with about the issue you care about. Do some research to see if there are other groups working on what you care about. Try going to their meetings to see if it is a good fit for you.
- If there isn't a group in your area you can look at groups who are working on the issues you care about in different states and start one up in your area, such as Rising Tide or Earth First!
- If you are starting a new group in your area that exists elsewhere then:
 - Read up on that group
 - Contact someone who works there
 - Ask if you can start a local group
 - Pull your friends together/people you want to work with and go over that group's principles, vision and goals and make sure there is alignment with your group's principle, vision and goals.

Your first few meetings and things that you plan together are as much about building your group as it is tackling the issues. As your group grows, in both numbers and with trust you will want to have a different kind of meeting that is not open to the public. You are going to want to go through a strategic planning meeting where you discuss:

- What is my vision for the world?
- Who is hindering me from seeing or achieving that vision?
- Who or what other groups might share that vision or might also have the same people or companies hindering them?
- Long term, intermediate and short-term goals
- What are our strengths and weakness of our group?
- Take a deeper look at who is hindering your vision to find your targets, create a power map of them.
- Tactics brainstorm to move target or build group.
- Timeline.
- You will also need to figure out how your group makes decisions; most groups we work with use consensus. If you do not know how to run a consensus-based group or meeting we can help you. I would suggest that you have a training for your crew before your first meeting, or ask someone you know who is good at this if they would facilitate your meeting.

Action Logistical Roles for your Affinity group.

Pre action

- Legal team
- Research
- Scout/Recon
- Outreach and organizing
- Logistics and support: gear/food
- Fundraisers
- Artist: banner makers, painters, sign makers, etc.
- Media outreach: Send out media advisory and media release

During Action

- Arrestees
- Direct support
- Cop counselor
- Media – Onsite and off
- Video
- Video support
- Communication
- Scout
- Medic
- Worker Liaison
- Wing nut Watch/ De-escalator
- Protest Rallier / Handouts / Signs
- Gear/food
- Facilitator / Decider
- Runners- to get key video or photos out of there and back to the media or legal team or to update different parts of the protest when radios or cell phone fail us
- Legal team (Legal Observer(s), jail support(on and off site))
- Jail support

Post action:

- Legal Team
- Debrief/party
- Documentarian/media- it is a good idea to follow up with the press, let them about your amazing actions and that you have video and photos for them (you might even be able to sell it)
- Fundraisers- after an action might be the first time the public has heard about you. your group and the issue you are working on. This is a good time to make an ask
- Public speakers

1 **Plan your Calendar BACKWARDS to put the Action together:**

- a Scouts visit the site; know how to get there and what it looks like....attached doc.
- b Timeline for action (when do you start and end and what is your plan B for this)
- c Chose Roles (for example): Arrestee, Direct Support, Police Liaison, Video, Media team, Worker Liaison, Banner Holder, Jail Support)
- d Test your action against the tactic star
- e Create chants if needed
- f Draft talking points and other press items
- g What skills will your team need to do the action
- h Who do you need or want to work with to do the action
- i Create an exit strategy
- j Create fun images that help you tell your story

2 **PREPARE!**

- a Make sure everyone who needs to get training is trained for the role they want or need to fill
- b Make sure everyone knows the talking points
- c Make sure everyone has a map or a strong understanding of the area
- d Play the what-if game--find a safe meet up place for post action debrief
- e Practice is important do 1-2 mock run-throughs, start-to-finish use a time to see how long it takes you from set up to finish. Once the cops are on the scene adrenaline kicks in, if we don't put our actions into muscle memory it will be hard for us the day of.
- f Make sure you have all the gear you need
- g Check the weather, what will your needs be based on rain or heat

3 **HAVE FUN! (do the action)**

- 4 **DEBRIEF:** Allow the group to learn from this action. Set the time and place for the debrief before you do the action! Everyone should be out of jail and be able to make this meeting. This is how we grow and become a more effective fun group to work with.

Action Checklist

(It is best when you can have a full 30 days to plan your action, but we know that life doesn't always work like that.)

Three Weeks to a Month before the Action

- Figure out your goal and message for the action; think about the factors of your group.
- What the action will be (this should be a creative brainstorm that goes until your group runs out of ideas).
- Who do you want to work with on this (other impacted communities, people working on same issue, etc.)
- Chose a location for the action and recon it (see attachment).
- Research your target then educate your group.
- Recruit people for the action.
- Plan a schedule for the action – including meeting times, and places and roles.
- Speak at events, table at other events, and generate lists of interested people.
- Contact other interested groups in the area and invite them.
- Send out an invitation to e-mail lists, Facebook and other lists.
- Start fundraising.

Two Week to the Week before the Action

- Call those who said they were interested and ask them to your event and tell them to bring a friend.
- Advertise your event with flyers and handbills and with a Facebook event.
- Meet with your core team or affinity group to confirm roles and responsibilities.
- Create talking points.
- Write a press advisory (to go out one week before event).
- Run through your timeline for the event.
- PRACTICE, especially if you're doing a direct action or anything role-play related.
- Review the Know Your Rights section of this packet; print legal info for people.
- Play the "What If" game and be prepared for every possible situation.

One week before the event to a few days before

- Print out materials needed for the event.
- Write press release.
- Do a site visit to make sure nothing has changed.
- Follow up with the people who said that they are coming.
- Meet with your team, go over everything.

The Day before the Action

- Sleep
- Gather last minute supplies
- Go over the event with your team

Day of the Action!

- Bring all the signs, food, water, clipboards, etc. that you need
- HAVE FUN!

After the Action:

- Get pictures up immediately!
- Follow up with media
- Debrief your event with you team
- Jail support if needed (an action isn't over till the last person is done with court)
- Do a fundraiser. Your group will make more money and get better turn out following an action if you get press that is, mainstream or social media.

Know Your Rights

We're not lawyers or legal experts here at Backbone Campaign, but we've spent some time collecting some great resources from people who are experts and lawyers, including the CLDC. Although most protests and actions are not illegal, some situations might increase your legal risks for dealing with police and security guards. Keep your rights and the rights of everyone in your group in mind and **BE PREPARED!** Look over some of the information we've collected below; it's a good idea to check with a National Lawyers Guild lawyer for your state's specific laws.

Police/Security Liaison

- Have one person (but they should have a buddy and it is best if the person is from the area where the protest is happening) to communicate to the police and relay info from police to the crowd
- Make sure that the people know that the liaison can't make decisions for the group
- When talking to the cops, the liaison should be polite and respectful, but not chatty
- As soon as police / security arrive – the liaison should go up and introduce themselves as the liaison (make clear that liaison is not the leader / in charge person)

- Liaison should ask for the cop in charge

Police Encounters

General rules for talking with police

- Don't make them nervous - nervous cops are dangerous cops
- Talk with your hands out of your pockets and visible to cops at all times
- Don't touch the cops or make sudden movements
- Remember that police are allowed to lie to you about anything and everything
- Police don't decide final charges (the prosecuting attorney does)
- Police don't decide whether you are guilty of charges (the judge or jury does that)
- Police don't decide sentences for conviction on charges (the judge does)
- Make sure to write down all the information about the police officer: cop's name, cop's badge number, what took place, all witnesses
- Try to have a witness
- Know your rights
- Make sure the cops are aware (if need be) what the situation is, e.g., "if you move X you will risk hurting our people"
- Don't talk to the cops if you're not the police liaison except to point them in the direction of the police liaison
- BE VERY RESPECTFUL IF YOU DO SAY SOMETHING – everything you say can and will be used against you in court
- If the cops keep questioning you, and won't talk to your police liaison you can ask, "Am I being detained?"
- If not, then you are free to leave

Detention

- If the cops say "Yes" to "Am I being detained?" then you are in "detention"
- They can only detain you if they have reasonable suspicion, based on articulable facts, that you broke a law or are about to break a law
- In some states you have to provide identifying information to a cop when you are being detained, like your name and address, depending on the state law. In some states you don't need to provide identifying information if you are detained. You need to check with local lawyers to find out the law in your state.
- Other than that, you can say "I am going to remain silent, I want to see a lawyer" – you can repeat this loud and clear as many times as necessary
- If you start chatting with them after you say "I am going to remain silent," they will assume that you no longer wish to remain silent
- You have to stay put, should only be a short time
- While detained, the police can search your bags and pat you down; you can say "I do not consent to this search"
- The police can only go into your pockets if they feel something that could possibly be a weapon (they get a lot of leeway here)

- You can ask, “Am I under arrest?”

Arrest

- The police can only arrest you if they have “probable cause” to believe that you committed a crime
- If you are under arrest, they can search to skin (same gender in some states) – you can say “I do not consent to this search”
- If you are under arrest, they can search you and your entire car, including the trunk – you can say “I do not consent to this search”
- Depending on the state, the cop may also be able to search your smartphone (if it is not password-protected) and copy all your contacts, emails, text messages, photos, videos, etc, on the scene and without a warrant – you can say “I do not consent to this search”

REMEMBER THESE CODE WORDS!!!

- Code Words 1: “Am I Being Detained?”
- Code Words 2: “I am going to remain silent, I want to see a lawyer”
- Code Words 3: “I do not consent to this search”

Security Guards

- If they ask you to leave private property, then it is illegal for you to stay on that property and you could be charged for trespassing
- You are free to leave anytime: don’t get stalled by them saying “YOU HAVE TO STAY HERE” or “YOU NEED TO COME TO OUR OFFICE” -- you don’t have to do anything, unless they are police officers and have detained you
- They can place you under citizen’s arrest, however you can lawfully resist an unlawful citizen’s arrest, unlike unlawful arrests by police officers
- Remember that these laws vary state to state and sometimes even between establishments – it would be a good thing to check into before you have an action inside of a mall

If you would like more information on legal issues, there are many activist legal collectives including the: CLDC www.cldc.org and The National Lawyers Guild is also a good resource, www.nlg.org