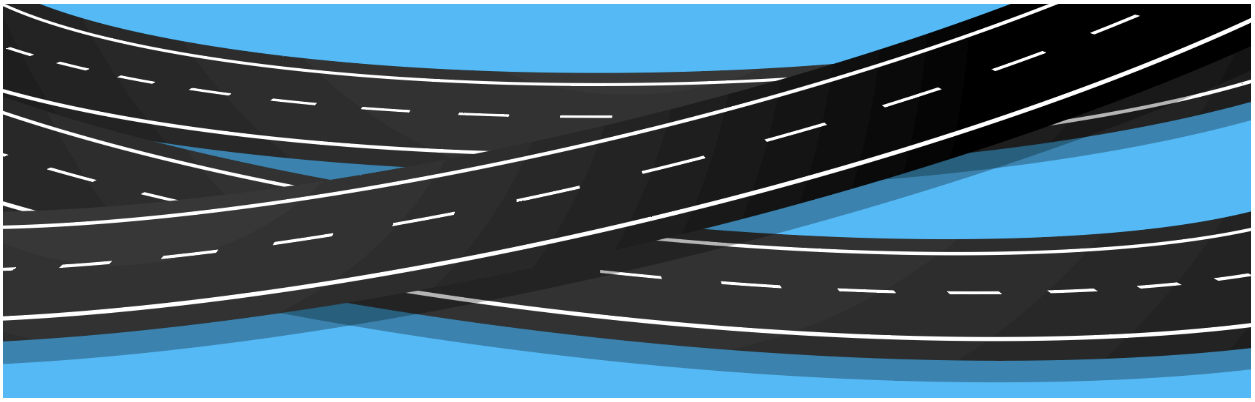
JUSTUS COORDINATING COUNCIL™

TOOLS OF THE GAME

VOLUME 2

TABLE OF CONTENTS

CHOOSING A STRUCTURE FOR IMPACT



It's important to think about how you will structure your coalition. Will it be an ad-hoc coalition with limited business functions needed, a fiscal sponsorship attached to another organization, or a 501(c)(3) / (c)(4) with both tax benefits and responsibilities? Again, this is up to you and what fits your community's vision.

Take a look below for a quick overview of each option.

- *An **ad-hoc coalition*** is a temporary alliance of autonomous groups formed around a single, specific issue — typically for the duration of a legislative or regulatory fight. These coalitions are loosely structured, with minimal formalization and no direct membership system. While some may last longer, they remain networks of independent organizations. They often have informal leadership, regular meetings, coordinated actions (like joint letters or press events), and may adopt a coalition name, letterhead, or secretariat. Ad-hoc coalitions typically include diverse groups representing different interests.

- **Fiscal sponsorship** is an arrangement where a nonprofit organization (the "fiscal sponsor") provides administrative support and legal oversight for a project or group whose work aligns with the sponsor's mission. This includes sharing the sponsor's tax-exempt status, meaning the sponsored group must follow the same compliance rules and use the sponsor's tax ID for funding purposes. The arrangement typically involves a mutual agreement on goals and deliverables to support fundraising efforts. To get started, look for well-established nonprofits with aligned missions and sufficient budgets. *Learn more about fiscal sponsorship.*

- **501(c)(3) or 501(c)(4):** Unlike the other options outlined above, forming a 501(c)(3) or 501(c)(4) involves establishing a fully independent nonprofit organization. This requires completing legal filings, including applying for federal tax-exempt status with the IRS (which is what the letters and numbers reference), and complying with ongoing reporting and governance requirements. While more complex to set up, these structures offer greater control and flexibility in advancing your mission. A 501(c)(3) allows for tax-deductible donations but limits political activity, while a 501(c)(4) permits more advocacy and lobbying but does not offer tax-deductible contributions. Creating a campaign under one of these designations can help formalize and sustain your efforts.

See the chart below for a quick comparison of the two options.

501(c)(3)s	501(c)(4)s	501(c)(5) &(6)s
501(c)(3) organizations are commonly referred to as **charitable organizations** Public charities, the most common type of 501(c)(3)s, are required to devote their resources to educational, religious, scientific, or other charitable purposes. 501(c)(3)s are permitted to engage in only limited lobbying activities and are prohibited from engaging in any political activity in support of or in opposition to a political candidate or party. A 501(c)(3) organization may engage in some **lobbying**, but too much **lobbying** activity risks loss of **tax-exempt status**.	501(c)(4)s are organizations that are not-for-profit and must be operated exclusively to promote social welfare. 501(c)(4)s can engage in unlimited lobbying activities and some limited political activities. Contributions to 501(c)(4)s are **not** tax deductible. 501(c)(4)s can be formed and dissolved quickly, so they may be an option for short-term goals.	501(c)(5)s organizations typically cover labor (unions), agricultural, or horticultural entities. The rules that apply to 501(c)(3) organizations when working with 501(c)(4)s are the same as when they work with 501(c)(5)s and 501(c)(6)s, so any references to coalition activities with 501(c)(4)s would also apply to work with 501(c)(5) and 501(c)(6) organizations.

Create Infrastructure

Responsibilities Within Coalition

Once you've decided on the overall structure, internally how will your coalition make decisions?

- *Steering Committee:* A smaller group of consistently invested stakeholders making decisions in the best interest of the campaign. This committee usually meets more frequently than the broader coalition to strategize, ensure deliverables are moving, and make high-level decisions for the coalition.

- *Working Groups:* These are groups created within a coalition based on areas of need. A committed member of your coalition (someone who shows up to meetings, participates, etc.) should chair the working group. Coalitions usually divide working groups in primarily two ways: 1) based on different segments or elements of an issue, such as Public Health or communications with the Department of Corrections, usually focused on developing talking points or policy recommendations; and 2) based on categories of needed infrastructure, such as communications, legislative strategy, fundraising, rapid response, etc.

- *Decision-Making Process:* Determine from the outset how the coalition will operate when making decisions — by consensus-building or by majority vote. Consensus decision-making allows for everyone to have a vote, ensures buy-in from coalition members, and allows all stakeholders the ability to voice concerns. Building consensus also takes more time, especially in a particularly diverse coalition. On the other hand, majority voting is a fast way to reach an agreement within the group, but may leave some coalition members feeling dissatisfied if their perspectives are not equally heard or valued. For more info on the differences between the two, check out these resources.

- *Plan for 11th-hour negotiations:* Early in the coalition process, spend time discussing the following questions about negotiation and priorities. Determining the following questions at the outset of your coalition will help if/when you need to make difficult decisions concerning your campaign. Additionally, having the answers to the following questions will help if/when conflict arises within the coalition.
    - What are you willing to give away?
    - What are your non-negotiables?
    - How can governance structure help define the process for deciding what trade-offs or sacrifices we can make to move the legislation forward?

- *Funding:* Where will your coalition get funding from? If you developed a coalition modeled on fiscal sponsorship or 501(c) status, you may be getting funding from other organizations, grants, or donations. However, those funds may not cover all of your costs — so you may need to be creative in finding and determining your funding streams. A few funding options might include the following:

    - **Fees or dues:** Each member organization must pledge a certain dollar amount to stay involved in the coalition (often based on the size or budget of the organization). This should be determined at the outset of an organization joining your coalition.

    - **Fundraising/Donations:** Asking individuals, businesses, and other organizations to help support your cause. Each state has its own requirements regarding charitable fundraising, which should be considered when going this route.

    - **Alternatives to Money:** Are there member organizations who have office supplies, digital platforms, or volunteers who can help with your campaign? Are organizations willing to "donate" one of their staff to help with your campaign? This is a way to offset costs and keep people involved without a monetary lift.

- *Communication within the Coalition:*
    - ListServs — Google Group, Mailchimp, etc. (allow people to opt-in)
    - Slack
    - Calls/text messaging
    - Meetings — how often? Is there a standing meeting?
    - Social Media (e.g., Facebook, Instagram, Twitter, LinkedIn, TikTok, BlueSky)
    - Sample sign-up sheet

IDENTIFYING POLICYMAKERS FOR IMPACT

To advance your campaign, you will need to identify policymakers who have power, interest, and connections to champion your effort. *Tools of the Game, Volume One*, offers a number of considerations when identifying policymakers, including whether your goals are to shape legislation or administrative agency regulations. An effective tool in deciding this is completing a power map. A power map gives you a landscape view of where power relationships stand in relation to your issue and how the campaign team plans impact.

Step 1: Identify potential policymakers. These elected officials generally include:

- ❏ Those who have the power to fix the problem
    a. For example: Those who chair committees in Congress or your state legislature (e.g., Chair of the Public Health or Criminal Justice Committee)
    b. Leadership within a county or city executive agency (parks and rec, development, etc.)
    c. Chairs or commissioners of boards who create and approve organizational policy
- ❏ Those who are geographically relevant to the issue
    a. Districts where there are prisons/jails
    b. Those who are in the same service area
    c. Districts that can "flip" and change power dynamics in policymaking
- ❏ Those who are working to fix the problem
    a. Legislators who have strong policy backgrounds in criminal justice reform, health, prisons/jails, etc.
    b. Justice policy professionals in agency leadership
    c. Community-based organizational leadership who contract with agencies and/or serve on committees
    d. Faith and other civic groups
    e. Policy analysts, chiefs-of-staff, and others who support elected officials work
- ❏ Those with whom you may already have pre-existing relationships
    a. Pre-existing relationships make it easier to identify values that drive change
    b. Is there a member of your team who has past wins with a target?
    c. Those who are in the same service area

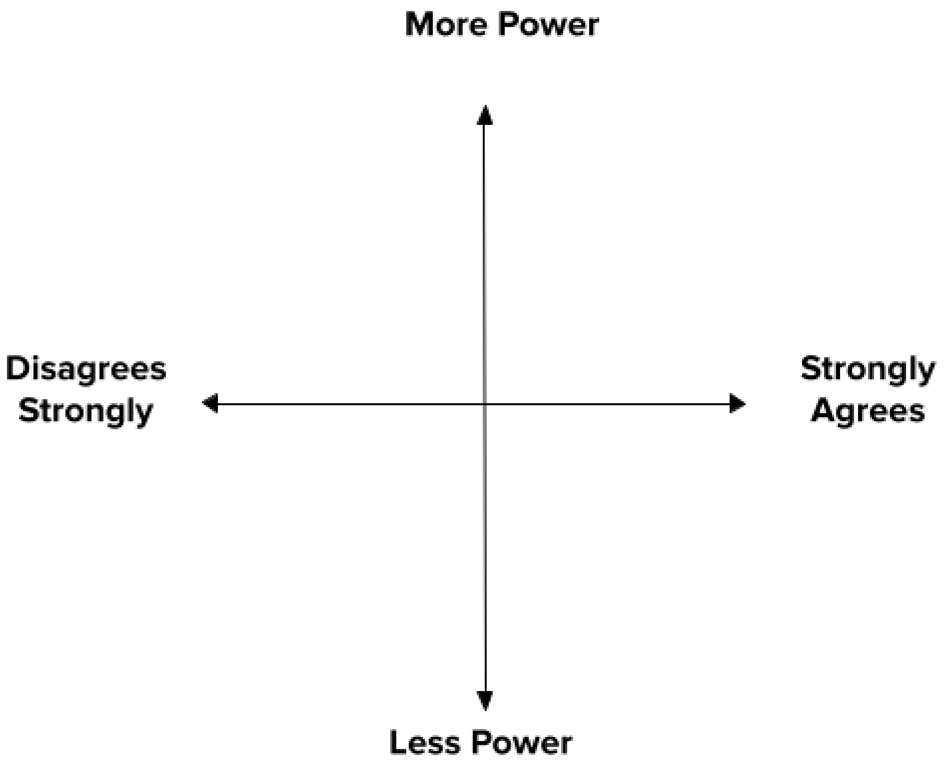
Your list may not be perfect; however, identifying the right stakeholders as you start your campaign will help you in the long run to achieve your policy advocacy goals.

Step 2: Research the list of individuals you identified in Step 1.

- ☐ Do they agree or disagree with you on this issue?
- ☐ How much power do they have over this issue?
- ☐ How have they previously voted on related policies?
- ☐ Are they in the middle of an election campaign (is this the right time to approach)?
- ☐ How do they stand to benefit or lose if your goals are met?
- ☐ In what ways can the public hold their decision making accountable? (this is power)

Step 3: Plot your elected officials using the [power mapping graphic](), based on the support and power of each elected official from your list.

Power Mapping Tool



Step 4: Identify your primary target. Based on the power map you have created, ideal targets will be in the top right quadrant — *those with high power and high support for your position.* These are the people you want to champion your policy.

Step 5: Map strong relationships connected to your supporter(s).

- [ ] Are they influenced by any of the other names you have written down?
- [ ] Who can sway them? *(People who can sway them may be other organizations or allies)*
- [ ] Does the time needed to sway them fit within your campaign timeline?

Step 6: Revisit and revise. Power and support are constantly shifting, so regularly revisit and revise these lists as needed. You'll know when!

GETTING PEOPLE INVOLVED

Gather endorsements: Elected officials are innately aware of the public's interest — that's what we pay them to do! Creating a statement of support and asking those in your network to sign can show the large and diverse body of constituents who are interested in the issue.

- ❑ **Craft a Statement of Support/Advocates Sign-On Letter**
  - ❑ Describe the issue in a few sentences, using details that evoke an emotional reaction in the reader.
  - ❑ Share why this is important, and connect it to other well-known issues or movements, if possible. Make the issue timely and relevant to the prevailing narrative.
  - ❑ Paint a picture of an effective alternative — what kind of change is possible, and what would that look like?
  - ❑ End with a call to action, including specific details about how interested people can get involved. The call to action may be different depending on what type of change you seek.
  - ❑ Include the exact reference to the policy (i.e., bill number, regulation number).
  - ❑ Create a Google Form you can send to advocates and organizations for quick sign-ons. The link will take you to a sample sign on.
  - ❑ Share the document with individuals and organizations who you think might be willing to publicly support your position.
  - ❑ Use your statement of support, including the signatures, to disseminate to the policymakers office.
  - ❑ For more information on shaping narratives, review "Communications and Values Based Messaging" in *Tools of the Game, Volume One*.

- ❑ **More on Sign-on Letters:** These are letters you can write or use language from policy campaign materials to garner support in two specific ways:
  - ❑ Advocate-led
    - ❑ List of recommendations with partner organizations signed on
    - ❑ Shows sector support behind recommendations and a clear message
    - ❑ Can be circulated to target elected officials
  - ❑ Policymaker-led (Sometimes called "Dear Colleague" letters): Must use a legislator who supports your legislation to get this started. They will then help do the work internally to get others to sign on.
    - ❑ List of recommendations with other elected officials signed on
    - ❑ Legislator will work to garner sign ons — you may be able to work from the outside to push other legislators to sign on, as well
- ❑ Examples:
  - ❑ Take Action: Sign on to Support the Reentry Act
  - ❑ Sample Form Letter: Public Comment to the U.S. Department of Housing and Urban Development

Leverage connections from your own network:
Have you worked in coalition with other organizations? Reaching out to them and getting them involved can help maintain and uplift your relationships.

Sometimes it can be as easy as picking up the phone:

- **Look at your contacts list** and send friends, family, and key stakeholders a quick text or even a call to tell them what you are working on and how you can use their support.
- **Cold call elected officials' offices** and talk about your issue with a Legislative Aid or Policy Director. This can help get your issue on their radar and create an opening for future interactions or partnership. Oftentimes, they will ask for a follow-up email with details. You can follow up by requesting an official meeting to discuss further.
- **Email** use listservs and coalition groups to post information regarding your campaign and how people can get involved.
    - Great way to disseminate your social media toolkit.
    - Search: Use your email correspondences as a jumping off point to find stakeholders who may be interested in helping to push your issue. A quick search through your emails can sometimes reveal people you would not have previously considered.

Get creative! As you build your momentum, feel free to try anything — from contacting friends and family to cold-calling phone lists. Your personal contacts list of emails and phone numbers can be the greatest tool in bringing awareness to this campaign. Above, we mentioned getting a list of organizational endorsements; you can do the same with your personal friends and family. Using the same statement of support you can create a sign-on letter or petition to help drive awareness of your issue.

Issue Identification

- A **problem** is a large-scale system, political situation, structure, social condition, etc. How a problem is framed is strongly connected to how stakeholders might respond.
- **Framing** is the lens through which a policy issue is seen — and that lens influences what actions are taken, who has access, and who benefits.
- An **issue** is *part* of a larger problem, for which we can propose (and win) a specific solution.
    - For example, the school-to-prison pipeline is a "problem," and how a school district handles expulsions is an "issue."

- **Why do issue identification?** Issue ID:
    - Helps us focus on real and specific changes
    - Allows us to align goals with our shared values and long-term vision
    - Lets you weigh competing priorities and how best to balance them
    - Creates a team-based structure for evaluating ideas
    - Creates space to surface different opinions, knowledge, and open questions

How to Use This Tool with Your Community or Coalition

- First, talk to your group to decide which criteria are important to all of you to consider. You may want to delete many of the criteria listed here, or add some of your own. What matters is figuring out what's important to *you*.
- Next, rank criteria (rows) in order of importance, with the most important ones at the top.
- Make copies of your chart for each issue you'll be considering.
- Evaluate each issue according to the criteria you've set out. The meeting organizers may want to include preliminary notes that address each of the criteria, or you can surface comments during a group discussion. Then, rate how well that issue meets each criterion from 1 to 5 (with 1 the lowest, 5 the highest).
- Tally up the total ranking for each issue.
- Repeat this process for every issue you're considering.
- Compare the total rankings for each issue, then review your highest-ranked issues by considering the rankings going down the chart. Are the rankings high on your high-priority criteria? If not, you may want to deprioritize that issue even if its total ranking is high.

ISSUE IDENTIFICATION CHART

Issue ID Chart: [POTENTIAL CAMPAIGN/ISSUE]

Make a Copy for Each Issue

CRITERIA FOR ISSUE SOLUTION	NOTES	RANK IMPORTANCE FROM 1-5 (1=LOW, 5=HIGH)
Promotes healing, restorative justice, and collective wellness.		
Benefits the people most impacted		
Values people over property and profit		
Prioritizes economic mobility and access		
Advances a budget that reflects our human needs		
Promotes cooperative ownership and shared decision-making with directly impacted voices		
Inclusive of environmental justice, green space, and land ownership		
Reduces reliance on incarceration		
Urgency. How urgent is this issue?		
Variety of tactics. Does the issue lend itself to a variety of tactics, such as base-building organizing, legislative advocacy, mobilizing, etc?		
Leads to other issues. Would focusing on this issue set us up to tackle related issues in future (by building a track record, base of people, and knowledge that's transferable to other issues)?		
Mobilizing. Will this issue move large numbers of people to action? Is this an issue that will allow us to expand our coalition, campaign or organization?		
Stands to benefit from a larger coalition? Are more voices necessary? Or is smaller strategic?		
Winnability. How difficult will it be for us to win it? Do we have enough power to win it? *(1=very hard to win and we don't have enough power; 5=easy to win)*		
TOTAL SCORE		

TO COALITION, OR NOT TO COALITION

Coalitions are alliances of people/groups/organizations who have a shared vision of a policy issue. Working in a coalition is an effective way for advocacy organizations to share and maximize resources to achieve a common goal. Coalitions draw on the expertise of partner organizations, build people power, and speak with a clear, unified voice to enact change. Examples of coalitions include The Leadership Conference of Civil and Human Rights, the Drug Policy Alliance, and, of course, the JustUS Coordinating Council.

Would developing a new coalition or using an existing one build the power needed?

As you weigh your options, a few questions to consider might be:

- Would a broader network of advocates help to get this bill on your legislator's radar?
- Can other organizations help to amplify this message through various means? (e.g., using listservs, social media, increasing turnout, making calls, etc.)
- Are you able/willing to share the workload of meetings, outreach, and education with others?
- Who has the leverage and power to work with policy gatekeepers?

Identify Appropriate Stakeholders to Join Your Coalition

A diverse and broad coalition group can help push your issue. However, it is imperative to include some of the following:

- **Directly Impacted Individuals/People:** Those who are closest to the issue you are speaking on — including people who were formerly incarcerated, family members, etc.
- **Organizations Working For People Who Have Been Impacted By the Justice System:** Legal Aid, organizations helping returning citizens, housing organizations, faith-based organizations, etc.
- **Public Health Experts**: Department of Health, academics, etc.
- **Emergency Management Experts**
- **Civic Leaders:** Religious leaders, business owners, community boards, etc.
- **Legal Organizations:** Reach out to legal organizations that are working on changes to the court, changes to the criminal justice system, etc.

As you work to identify partner organizations, reviewing public statements, social media posts, and action alerts can help you learn about similar missions. You can also use the Coalition Stakeholder Tool to think through organizations that could potentially benefit your campaign.

COALITION STAKEHOLDER ASSESSMENT TOOL

LEVELS OF ENGAGEMENT	CONSIDERATIONS	LIST ORGANIZATIONS AND INDIVIDUALS TO RECRUIT FROM THIS CATEGORY
Core	Who is directly aligned with your campaign mission? They are consistent and show up for all meetings, events, etc. They help to drive and strategize the campaign. You trust their vision if you were absent. Provide money, resources, intellectual input, strategic insight, etc.	
Comrade	Those whose success is wrapped up in your success. If this campaign succeeds how does that help advance their mission? Fairly consistent and willing to help on heavy lifts. Meeting with Electeds, Calls, Op-Eds, etc.	
Allies	Those whose clients, members, or participants will be better served if your campaign is successful. They may not be able to be as invested, but always willing to help with mid-low level lifts. Uses social media platforms to amplify your message, shares talking points, and distributes actions to their listservs.	
Strategic Alliance	Are there organizations you are connected to that have key connections to policy makers, governmental offices, or influencers? They may not be as involved but willing to help act as a way for you to get closer to power and decision-makers.	
Unlikely Allies	Demonstrating bipartisanship and collective support can be especially effective when those at opposite ends of the issue area writ large can find agreement on related policy reform needs. How can you use power mapping to identify opposition and then create unlikely allies for your coalition? Learn more in the "Identifying Targeted Policymakers" section of this toolkit.	

PLANNING FOR ACTION

When trying to mobilize support for an issue and change policy, two key tools at your disposal are direct action and advocacy/lobby days. Here are a few of the key differences between these events:

Category	Direct Action	Advocacy/Lobby Day
Type of Event	A rally, march, convening, protest, or other form of public issue-based gathering.	An event to connect with elected officials directly and explain or advocate for specific policy or legislation.
Typical Purpose	To garner public support and interest in an issue. Media coverage, amplification of the message, a call to action are goals.	To ask elected officials directly for support/sponsorship around specific policies and legislative action.
Type of Message	Broad, usually condensed in a slogan or sound bite.	Specific, articulating policy proposals and support for specific bills.

Planning a Direct Action: Considerations

Direct Action campaigns and events are effective ways of mobilizing public support, garnering media attention, and sharing a broad message to a large number of people. Such events also take a lot of planning and effort to have impact. Keep in mind that some large events may not be the best forum to get into the nitty gritty of a campaign. To learn more about coordinating office visits and other policy advocacy efforts, review Toolkit One.

For some direct actions, it is wise to focus your efforts on sharing a short, memorable message, and use the momentum from the direct action to follow up with additional details to those who express interest after the event.

Start with Your Purpose

Clarify your goals, target, and message.

- *Why are you doing this action?*
- *Is it aligned with a values-based solution*
- *Is your call to action clear?*
- *Who needs to hear your message—and how will you reach them?*

Build a Team and Delegate Roles

Organizing an action takes people, not just plans.
Assign roles early, build communication channels, and make sure everyone knows who to go to.

Below is a sample set of roles and responsibilities you may consider for a direct action:

- ☐ Team/march leaders
- ☐ Security team
- ☐ Traffic crossing guard (marshalls)
- ☐ Material and literature distributors
- ☐ Media and Communications person
- ☐ Organizational spokesperson
- ☐ Registration team
- ☐ Set up crew
- ☐ Clean up crew
- ☐ Handlers for guests and headliners
- ☐ Drivers
- ☐ Hype people
- ☐ Equipment distribution & collection
- ☐ Scheduling Coordinator
- ☐ Medical Team
- ☐ Volunteers for information table
- ☐ Triage Coordinator
- ☐ Hospitality coordinator
- ☐ Legal observers *(see below)*

Prepare the Message and Materials

Your message should be simple, visual, and powerful. Below are questions to consider:

- What is your message?
- Can it be summed up in a "slogan"?
- What is your slogan, theme, sound bite?
- Does your message look appealing when marketed?
- Are your demands clear and simple?
- Do you have several fallback demands?
- Are there other audiences besides the primary focus?
- What do you want them to know, and what do you want them to do?
- Do the message and purpose fit together in a way that is easily understandable?
- Does the message work for both digital and in traditional organizing?

For more information, please reference our guide to Working with Media and Values-Based Messaging found in *Tools of the Game*.

Choosing the Right Location

Pick a place that makes your message visible and keeps everyone safe.
Include a few guiding questions:

- How does this site relate to your goals?
- Is it accessible? Visible? Safe?
- What's the backup plan if weather, police, or permits change things?
- Are there costs involved or any agreements that need to be made?

Mobilize Your Base

A good turnout starts with a great plan.

- Who are you mobilizing, and how are you reaching them?
- Are the roles and responsibilities aligned with the expertise of the person?
- Use social media, email, flyers, phone trees, etc.
- Make a turnout plan or MOCHA chart (with reminders!).

The [Sample MOCHA Chart] contains several tabs with various ways to plan for mobilization.

Prepare for the Unexpected

Safety and Rights: Prepare Your Coalition
Before any action, assess potential risks to participants' safety, legal wellbeing, and access needs. Develop a clear plan for crowd management, medical response, and de-escalation. Designate a security lead (and additional observers as necessary) and ensure all team members know the closest medical facilities and have emergency contacts, including legal support hotlines.

Offer a "Know Your Rights" briefing in advance including what to do if stopped by police, your right to remain silent, your right to record, and what to expect if arrested. Share printed or digital resources with participants specific to your event type. Plan for flexible turnout and have strategies for both low and high attendance. *Always make sure all participants understand how to exit safely if needed. Building a culture of preparedness protects everyone involved.*

National Resources:

National Lawyers Guild (NLG) nlg.org Offers legal observers (888-NLG-ECOL)	**American Civil Liberties Union (ACLU)** www.aclu.org/know-your-rights Comprehensive guides on rights, police and more	**Movement for Black Lives (M4BL)** | m4bl.org Offers organizing and safety tools

Day-Of Program and Media Plan

Design the event experience and control your story.

- Who's speaking or performing? When?
- Do you have equipment (e.g., mic, speaker system, podium, generator)?
- Is the press invited? Who's the media point of contact?

Check out this Run of Show template to help design the event flow.

After the Action

Follow-up is where momentum builds.

- Share photos/videos and tag participants.
- Send thank-yous to volunteers and partners.
- Debrief with your team — what worked, what didn't?
- Plan next steps or connect people to the broader campaign.

Learn more in this toolkit about leveraging digital advocacy to create collective impact.

How to Plan an Advocacy/Lobby Day:

Most elected officials want to make sure that they understand the consequences and benefits of any particular piece of legislation on their constituency. Organizing a lobby/advocacy day enables voices from different parts of the state to be represented, shows people power, and provides an opportunity for education and understanding. Incorporating legislative meetings with a press conference/rally will only help to amplify your message. Remember, the appearance of power *is power*. Just a note on 501(c)(3)s and lobbying: These organizations may engage in some **lobbying**, but too much **lobbying** activity risks loss of **tax-exempt status**. Please check with state agencies around lobbying limits.

8-12 Weeks Prior to Your Event

- ❏ Determine the format of your advocacy day
  - ❏ Rally? Press Conference?
    - ❏ Are there high-demand speakers you want to be present?
    - ❏ Do you want Elected Officials to speak?
- ❏ Identify if there is a reservation system for areas within legislative office buildings, capital buildings, executive offices, etc. where your group will be holding a rally/press conference.
- ❏ Determine if you will offer transportation. Do you provide public transport money, organize a bus, car caravan, etc.?
- ❏ Order T-Shirts/Banners/Swag
- ❏ Advocacy Day sign-up and social media campaign

4-6 Weeks Prior to Your Event

- ❏ Begin to schedule appointments with legislators. KEEP A TRACKING SHEET! Buy into the 3x3 mode of follow-up: 3 calls and 3 emails, a total of SIX touchpoints.
- ❏ Make sure you are aware of any special needs of participants.
- ❏ Find a meeting location and arrange lunch, if applicable.
- ❏ Assemble Advocacy Day information packets.
- ❏ Prepare a 30-minute to 1-hour training session on expectations of the day.
- ❏ Request legal observers.

1-Week Prior to Your Event

- ❏ Participants: schedule, maps, summary of issues with talking points, Advocacy Day report form: feedback from meetings/important convos/follow-ups needed.
  - ❏ Have a tool for Advocacy Day that will help members identify their elected officials. (photos/headshots)
- ❏ Legislative Packets: one-pager, supporting evidence, sign-on letter, card/contact details (always bring extra)
- ❏ Organize Roles of Participants: speakers, team leaders, media, etc.
  - ❏ Ask participants to bring homemade signs. Be careful about building-specific regulations on bringing in a sign pole, materials, etc.
- ❏ Uplift Advocacy Day on Social Media: Encourage key stakeholders and others to share/re-post.
- ❏ Send out a press release regarding your Advocacy Day
- ❏ For sample media releases, check out JLUSA's Media page or use this sample document to create your own.

1 Day Before Your Event

- ❏ Confirm Bus/Transport Options
- ❏ Check folders, T-Shirts, Banners, Swag: Have a plan for how it's getting to event.
- ❏ Send Out Reminder Email with important information: Provide a cell phone number for people to connect with you.

Day Of Event

- ❏ Last-Minute Advocacy Day Briefing on the Bus (Albany)
- ❏ Make sure that volunteers and staff are positioned to assist members with directions.
- ❏ TAKE PICTURES: post on social media using hashtags, tag elected officials official accounts, and include a call to action. *Again check that those you are taking pictures of are comfortable with distribution.*
- ❏ Arrive at Rally/Press Briefing Area early to ensure staging for the group and everything is ready for your rally.
- ❏ Collection plan for feedback forms after the event to ensure that you get as many forms back from participants as soon as possible.
- ❏ Have a contact location and number with a person always on duty to help anyone with directions or questions.
- ❏ Debrief after event at agreed upon location

After the Day

- ❏ Email a thank you to advocates with highlights of the day and next steps.
- ❏ **Follow up** with Electeds' Offices with info they may have requested and thank you.
- ❏ Post social media messages regarding success of the day, photos of electeds, shout outs.
- ❏ Consider completing a post-event summary for your records and future partnerships.

What went well? What went wrong or could be improved? How do participants feel, their take? Any future actions? (e.g., follow-up emails with representatives, reporters/journalists). Future collaborations? New ideas for recruitment?

Logistics:

Here is a simple checklist of all the things you might need — but be sure to customize to your specific event!

- ❏ Signs, Banners, etc. about the issue
- ❏ Flags
- ❏ "Day Of" handouts
- ❏ Sound System
- ❏ Bullhorns and batteries
- ❏ Sign-In sheets, clipboards, pens
- ❏ Noisemakers, whistles, drums
- ❏ Visual props
- ❏ Legal instructions (i.e., legal permits, guidelines for events)
- ❏ Chant sheets (practice the call-and-response and have a chant leader)
- ❏ Cameras, film
- ❏ Food, drinks, snacks
- ❏ Water bottles
- ❏ Transportation (buses, vans, cars) and routes for drivers. Be specific about where you will meet, start time, and departing time
- ❏ Set Up crew
- ❏ Cleanup crew
- ❏ T-shirts (are we looking the same?)
- ❏ Day-of Press packets
- ❏ Communication equipment (radios, phones)
- ❏ Bail money, lawyers to contact in case is needed
- ❏ PPE — Masks, gloves, hand sanitizer, cleaning wipes
- ❏ First aid kits
- ❏ Stickers or other "swag" to give away
- ❏ Hand warmers (if a cold day)
- ❏ Tents/canopies (for shade/sign-in booths

WORKING WITH MEDIA

Earned/Traditional Media

One of the best ways to get your message across is through op-eds, as well as letters to the editor and appearances on radio and TV. You want to tailor your approach to the audience of that particular publication or outlet. An effective way to get your message to audiences is to tie your action to a breaking news event, e.g., when Tropical Storm Isais hit, it meant there was an appetite for information about disasters. Anniversaries of big events such as Hurricane Katrina can also be very valuable in attracting media attention. These events can range from anniversaries of U.S. Supreme Court decisions to a holiday with a connection to your issue.

Op-Eds: Published pieces are ideally 600-800 words. You want to tell a narrative that would be of interest to the reader, combined with a call to action. Op-eds allow you to get your message out to audiences directly and clearly — but the market for op-eds can be crowded. Newspaper editors can often reject submissions. However, op-eds are a powerful way to motivate your audience to action. See our op-eds tips sheet. It is easier to convince a newspaper to publish an op-ed if you, or the entity you represent, have a direct relationship with the newspaper editor, but this is not necessary. You can also cold submit (see the *New York Times* help sheet) If you want to solicit potential stories for use to draft an op-ed you can use a Google form and ask them the questions that someone can then finesse into a piece.

Letter to the Editor: A letter to the editor is in response to a piece published by that particular publication. They tend to be 200 words or less, either agreeing or disagreeing with the originally published piece. This is why it is critically important to create a Google alert that can allow for comment where you authentically connect it back to your own campaign. (Here's how to create a Google Alert.) See *Washington Post* example.

Radio/TV: This is one of the best ways to reach a wide audience. While you mostly control the narrative with op-eds and letters to the editor (they may be edited) with TV and radio you do not. This is an interview. While you will have conversations ahead of time with the relevant producer, the interviewer may ask unanticipated questions. You want to redirect them back to the conversation you wish to have. You can acknowledge their question and then say something to the effect of "but the thing that I think is important to remember is …" so that you can redirect the interview (pivot) back to your own message.

Media to Amplify

When news stories, interviews, and panels are published about your action, use it to promote your campaign to your contacts and social media followers. As an example, the list below are some highlights of media generated by the JustUS Coordinating Council that we have amplified to raise awareness and garner more support/participation.

America's Incarceration Rate Is About to Fall Off a Cliff
#JustUs Campaign Demands Emergency Plans for Prisons During COVID-19
Advocates Launch Campaign Demanding Protection for the Incarcerated During Emergencies
Decarcerate America Now
"We're out here": Formerly incarcerated activists are bringing their voices to the DNC

Digital Organizing

How to Build Power Online
During the COVID pandemic, we have all made a shift from in-person organizing to digital platforms. Our goals in digital organizing are threefold; building, engaging and activating communities. This method of communication has the ability to amplify our organizing beyond local networks and have a broader statewide or national reach, so where do we start?

Step 1: Name Your Goal & Stay Consistent

- Example: "For the #JustUs campaign, we are looking to put into law emergency management plans for people who are currently incarcerated".
- When posting on social media, make sure your goal is always understood by your followers.
- Communicate your goal in a compelling way. Many stakeholders respond to pre-existing examples like natural disasters or recent events that illustrate the importance of policy recommendations. Others respond to facts related to agencies or programs missing the mark. Be sure to have data and quotes ready in case you need them for reference.
- Asks should be clear, research should come from reliable sources, and messaging should match talking points.

Step 2: How Will You Leverage Media?

- If we livestream a rally, how can we use that at a later time? Can we send that to elected officials? Send to our ListServs?

Step 3: Who Are Your People?

- You know better than anyone the people who will engage with your online presence. What platforms are they using? What language/graphics/art can you use that will grab their attention?

These digital marketing tools offer a free, basic plan for starting out in social media:

Buffer, Later, Zoho Social, Hootsuite: social media management and analytics
Canva, Adobe Express: design graphics, videos, and more with free templates and stock images
Grammarly: free AI writing assistant, grammar checker, and editor
Bitly: shorten links and track clicks.
Calget: create "add to calendar" links for events
Mailchimp, Mailerlite, Brevo: email marketing and automation with templates

Let's Talk Platforms & Ways to Use for Best Impact:

Facebook currently has the largest number of users of all social media platforms. Chances are, your audience has a FB page. Using this site allows you to post events, go live, create a FB group, and send direct messages. Leveraging FB groups you are already involved in is a quick way to get support for your campaign.

Instagram is a great platform for visual content. Engagement on this platform works a bit differently, however it can still be a powerful tool. Use the photos to capture excitement around your campaign. Short vertical videos called Reels (like TikTok videos) can be very effective. If your advocates are on Instagram, tag them! Use the Stories feature to tell followers about events, updates, and mini-wins.

TikTok is a space to upload short-form media clips and is popular with younger people. The platform enables people to connect a personalized political message to a broader political moment. Do not discount the use of this platform in engaging advocates who may otherwise go untapped.

YouTube is the second largest social media platform and the second largest search engine (after parent company, Google). Having your content on YouTube will help it get seen and discovered by a lot more people. Like TikTok and Instagram, YouTube has fully embraced short-form vertical videos, called Shorts on YouTube.

LinkedIn is more of a professional networking platform, but its user engagement has continued to grow and grow, making it an important platform to be on personally and also for sharing about your campaigns. If you have an organization or coalition, you might want to consider setting up a page specifically for that and making posts there instead of or in addition to your personal profile.

BlueSky is one of the newest social media platforms, but it is growing in user engagement and popularity, because it offers more user control over the experience through customizable algorithms and feeds, a more positive and less toxic environment compared to other platforms, and a decentralized, open-source framework that appeals to users seeking more freedom and independence. Skylight is also the video platform associated with BlueSky.

Important Notes on Social Media:

- Post consistent messages about your campaign from the Social Media Toolkit.
- Send direct messages on Facebook, Instagram, or TikTok to those who are doing similar work and ask them to amplify your message.
- Re-post/share another organization's work that is similar and connect their issue to your campaign.
- Think through interesting ways to energize the base. For example, you may request that participants take a selfie with a piece of paper describing something that occurred and when and where they were with corresponding text about the issues involved.
- Algorithms/engagement
    - More engagement usually means your post will show up higher on your followers' feeds
    - Engagement = likes, comments, shares, clicks, etc.
    - Directly encourage sharing, commenting
        - Ask questions, encourage sharing to increase awareness of your issue
            - Bump up posts by posting them to your story
    - Hashtags #
        - Used to find things on specific topics, events, etc.
        - Can help garner engagement and reach target audiences
        - Can be used as campaign slogans/name
            - ex. #JustUs
- Live videos (protests, panel discussions, speeches by leaders, writers, activists, etc.) — opportunity for different type of engagement

Actions via Digital Platforms

Direct Actions, prior to COVID felt like the norm, however, we now live in a time where carrying out actions digitally is an opportunity to increase engagement, keep people safe and create a collateral that will live on for more than one moment in time. Choosing what platform, who your target audience is and your intended impact will vary, but here are some things to help in making those decisions:

- Call-to-Action Platforms: Platforms orgs can use to direct folks to take action online
    - Sign a letter, send a pre-written email, sign a petition
        - JLUSA's #JustUs platform

- Fully digital/phone-based advocacy day: Legislators are now accepting meetings through calls as many people are still working remotely.
    - You can schedule a two-day advocacy day but from the comfort of one's home.
    - The same rules apply as with a regular advocacy day, however, everyone is participating from the comfort of their home. There should be a designated "team leader" in each of the meetings.
    - To get people energized you can host a rally on a platform like Zoom where you have a run of show, potentially invite press, engage in chants, and demonstrate support for the issue.

- Town Halls/Panel Discussion: Opportunity for real-time conversation on your campaign, with the ability to share out recording after the event.
    - Choosing a platform based on your audience and goals

        - Instagram Live, Zoom, Twitch, YouTube live, Facebook live, TikTok live
            - ex.) IG live might be better for mobilizing a younger audience, but not for including multiple people in your live event. Zoom might be better for having a panel discussion, etc.
    - Have a plan
        - Assign clear roles — who will deal with tech issues, moderator, monitoring the chat, timing, etc.
        - Have an agenda/run of show including timing and lines on what to say labeled with speakers, if possible
        - Prep speakers!

- Phone-banking: While not technically "digital" this may feel more comfortable to a group that is not as tech-savvy. You provide the numbers of elected official's offices (publicly available on their website)
    - Assign people to call groups of individuals.
    - Provide them with a script.
    - If you set a target time window you can do what is known as a call-zap. This is intended to flood an office with so many calls they are forced to acknowledge your issue.
    - You can promote the results of the call-zap on your social media.

- Coordinated Social Media Direct Actions (more specific directions included in the social media toolkit).

Social Media Toolkit

Social Media Toolkits offer a coordinated effort that works toward a specific goal using social media communications. When you create a toolkit it will be specific to your campaign goals and also provide a central place for those working with you to share out your message with ease and consistency. Below are some reasons social media toolkits are helpful:

- A set of information and tools for amplifying your message — rather than mainstream media outlets spreading the word, your audience can use their own social media to spread the word.
- Includes campaign/org goals, target audience, sample posts, logos, hashtags, graphics, videos, etc.
- Creating and sticking to a brand
    - Staying on brand so that your posts are recognizable by viewers
    - Sticking to a few colors, fonts, and hashtags that represent your organization or campaign
    - Include your logo on your posts — when people share your posts, their audience will know where to go for more information.
- Seize and leverage the moment to build momentum — dates, anniversaries
- Making action/participation as easy as possible
- People will be more likely to interact with, share, and participate in your campaign if:
    - You give clear and concise instructions on action items:

    - Who to contact, how to contact them, and what to say
    - Which petitions to sign
    - Ask audience to share campaign posts with specific hashtag(s)
  - You stay organized!
    - Making a centralized Internet place for petitions, updates, etc.
    - Keeping a consistent message and brand that makes your campaign a reliable source

Sample Social Media Toolkit: As an example, view the JCC Launch Social Media Toolkit. On Google Docs, you have the ability to make a copy of this toolkit and then edit the toolkit with your own state-specific campaign.