

# 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:

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

## 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:

<b>National Lawyers Guild (NLG)</b> <a href="http://nlg.org">nlg.org</a> Offers legal observers (888-NLG-ECOL)	<b>American Civil Liberties Union (ACLU)</b> <a href="http://www.aclu.org/know-your-rights">www.aclu.org/know-your-rights</a> Comprehensive guides on rights, police and more	<b>Movement for Black Lives (M4BL)</b>   <a href="http://m4bl.org">m4bl.org</a> Offers organizing and safety tools
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## 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)