Agenda

Tackling the spring semester

Building relationships and coalitions remotely

Facilitating effective digital meetings

Building out an action plan

We understand that this is a strange and stressful time that we're living in. We wanted to offer these strategies and resources for our students who are in a place to still be able to advance their work.

Your own health and wellbeing comes first.

IDEAS ORGANIZING

You are probably here in the spring semester.

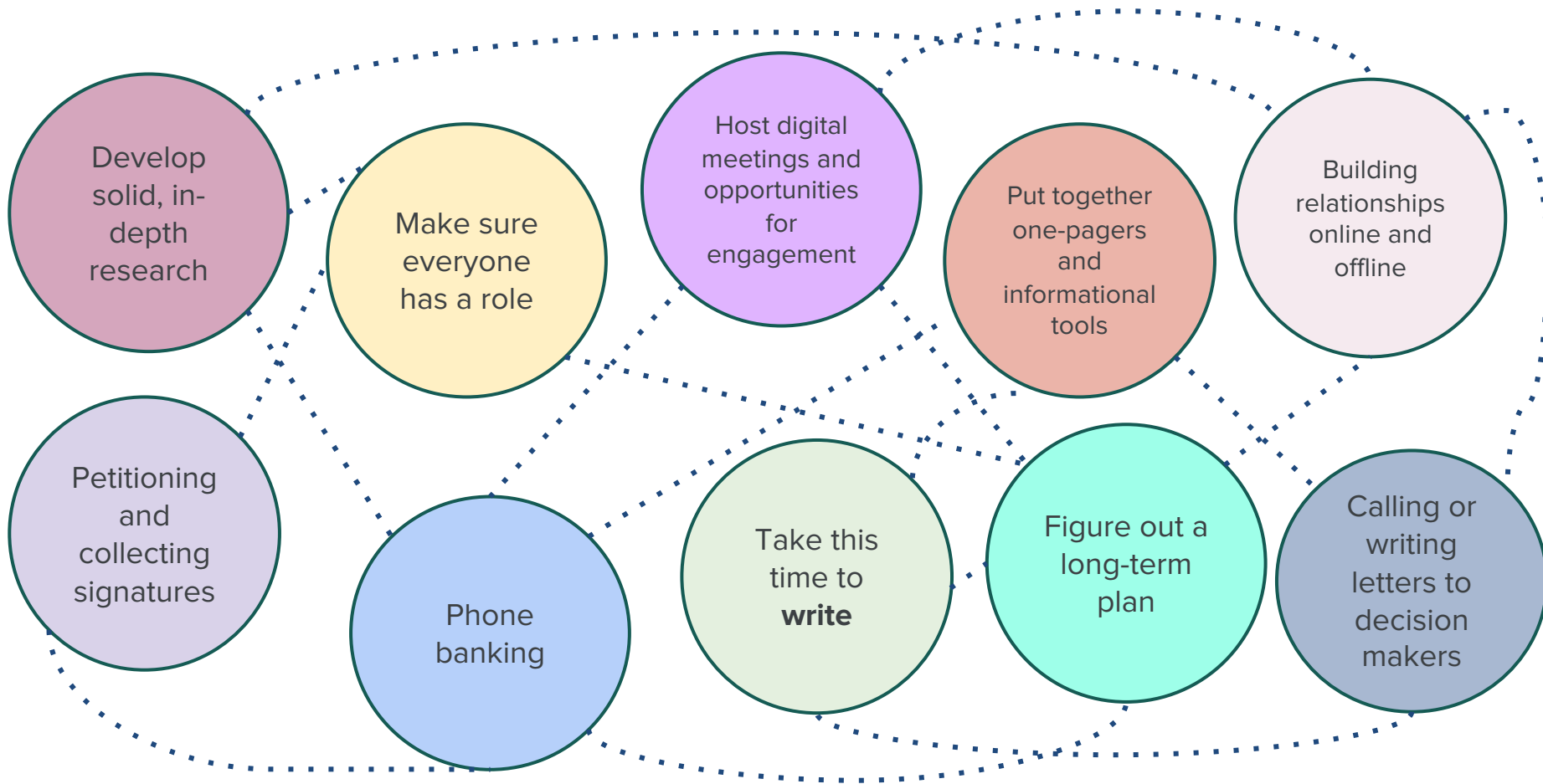| 1. Identify a problem	2. Build agency	3. Design a policy	4. Influence a decision-maker	5. Solve problem
We should seek to identify *specific* issues, so that we can find a best-fit, actionable solution.	We build agency around these issues in order to create a solution that equitably serves us all, understand its potential impacts, and start to generate some momentum.	With the understanding you've gained, it is time to organize it together to create a concrete recommendation for change.	To have your idea implemented, you will need to influence decision makers in the institution responsible for passing the change.	Solving the problem does not happen overnight, and we celebrate the milestones along the way that get us closer to our ultimate goal.

So what can we do?

So what can we do?

- Develop solid, in-depth research
- Make sure everyone has a role
- Host digital meetings and opportunities for engagement
- Put together one-pagers and informational tools
- Building relationships online and offline
- Petitioning and collecting signatures
- Phone banking
- Take this time to **write**
- Figure out a long-term plan
- Calling or writing letters to decision makers

The things that connect together to keep your chapter running in normal times can still happen — just with new digital tools and strategies.

Tackling Spring Semester

Remote Edition
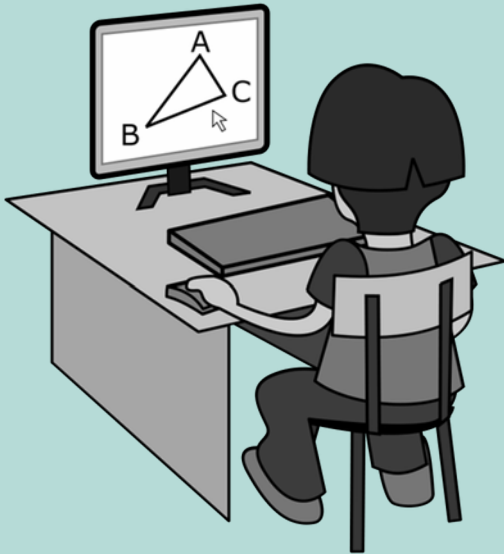
What can your chapter or association still do?

✓ Host general body meetings

✓ Hold events

✓ Transition leadership & hold spring elections

✓ Work on projects (more on this later!)

Most things!!

What tools are available to use?

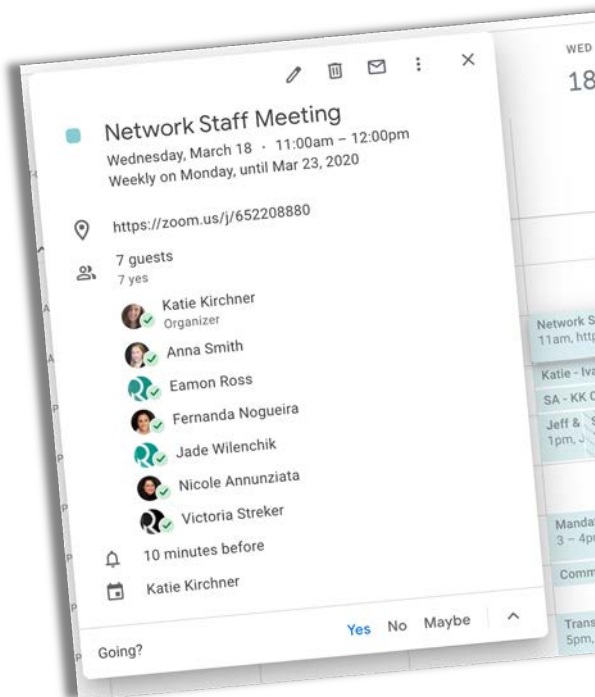|	
Zoom / Jitsi	Free video conferencing. Can work for small to mid-sized groups
Google Hangouts	Free video conferencing. Better for larger groups
Asana	Collaborative project management platform. Useful for more visual learners
Trello	Collaborative project management platform. More useful for individual to-dos / keeping track of individual team member responsibilities
Slack	Messaging platform; useful integration with mobile devices
BlueJeans	Videoconferencing; membership provides additional features
Loom	Videoconferencing for projects that require visuals. Excellent screensharing function
donut	Slack pairings for virtual 1-1s or coffee meetings to stay connected. You can set up nonprofit, educational, and free Slack communities with this one for free for 90 days

GENERAL BODY MEETINGS

Continue to meet regularly, even if it's just bi-weekly. Include members in the planning and decision-making process.

Set responsibilities and expectations early on with your team — especially executive boards. Everyone should know exactly what they're expected to do and what their deadlines are to make meetings happen.

Communicate clearly about what's going on:
- Take into account members will be in different time zones, so ensure everyone knows what time these meetings will be.
- Make sure everyone knows which tools you'll be using (ie: Zoom vs. Hangouts).
- Consider setting everything up via Google Calendar.

Network Staff Meeting
Wednesday, March 18 · 11:00am – 12:00pm
Weekly on Monday, until Mar 23, 2020

https://zoom.us/j/652208880

7 guests
7 yes

Katie Kirchner
Organizer
Anna Smith
Eamon Ross
Fernanda Nogueira
Jade Wilenchik
Nicole Annunziata
Victoria Streker

10 minutes before

Katie Kirchner

Going?   Yes   No   Maybe

GENERAL BODY MEETINGS

Don't be afraid to crowdsource the agenda (what do people want to talk about? Need this space for?), and be less rigid with agendas. General body meetings can be a place for everyone to just check in with each other.

Set clear and tangible goals together as a group. Make sure you agree upon metrics of success for those goals; results should be quantifiable.

Don't be afraid to reevaluate or admit when your structure is not working as intended.
- It's okay to change roles and responsibilities based on your chapter's needs.
- It's ok to repurpose what general body meetings cover or talk about.

GENERAL BODY MEETINGS

AGENDA:

(An example for student chapters, mostly)

- Check in with people - How's everyone doing? Pros and Cons of being at home? Of digital classes?

- Chapter updates: What's going on? What are to-do's?

- Presentation, training, workshop, etc.
  - Public goods
  - We have our whole training curriculum that can be done remotely!

- Close-out: Make sure everyone knows next steps, the next meeting, etc.

GENERAL BODY MEETINGS

- Make sure videos are on! There's no point in using a video call if you can't see each other.
- Be human
  - These are meant to be conversations -- it can be awkward, so just try to be friendly, personable, and humorous, as you would during an in person convo
- Use visuals when possible (if it's more of a webinar format or you plan on sharing your screen)
  - Don't make all-text slide decks. At the very least, design them or use a template
- Make sure there's some team or relationship building at the beginning and throughout the convo -- don't just talk at people, but get to know them better
- Design break out activities
- Use the chat when needed, but NOT when you are speaking
- Incorporate small breaks

# EXEC BOARD MEETINGS

(for student chapters)

EXAMPLE AGENDA:

- Check in with mental health/being home, etc.

- Discuss the Spring Incubator (two members of the exec team are on the incubator and we wanted to see what they were up to)

- Thinking about next steps for this semester (online webinars, etc.)

- Summer plans (Roosevelt Summer Fellowship, etc.)

- Thinking about next year (will school still be online?, transition plans, etc.)

CHAPTER AND ALUMNI ASSOCIATION EVENTS

Remote "Pizza and Policy Night"
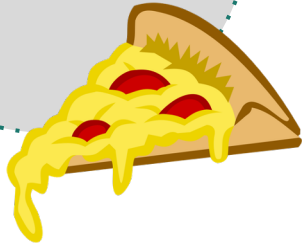
Tune in to our alumni webinars!

Have a digital movie night where you all watch a documentary and discuss on a group call later!

Have a digital speaker or panel — alumni can help here!

Host a digital discussion about a policy issue — members can volunteer to lead!

Hold cross-chapter mixers!

ALSO CREATE INFORMAL SPACES

Share meals or cook together over a video call

Host a virtual game night! (There are plenty of free and low-cost options out there)
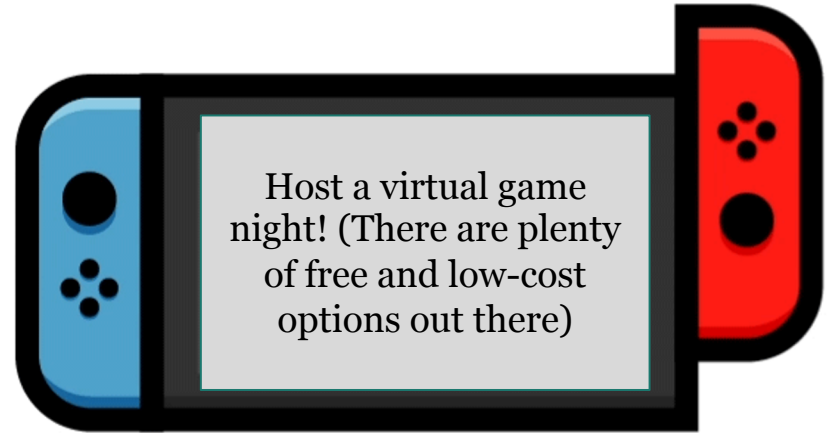
Create a space to share photos of your pets

Have a digital movie night — Chrome has an app called "Netflix Party" to help with this!
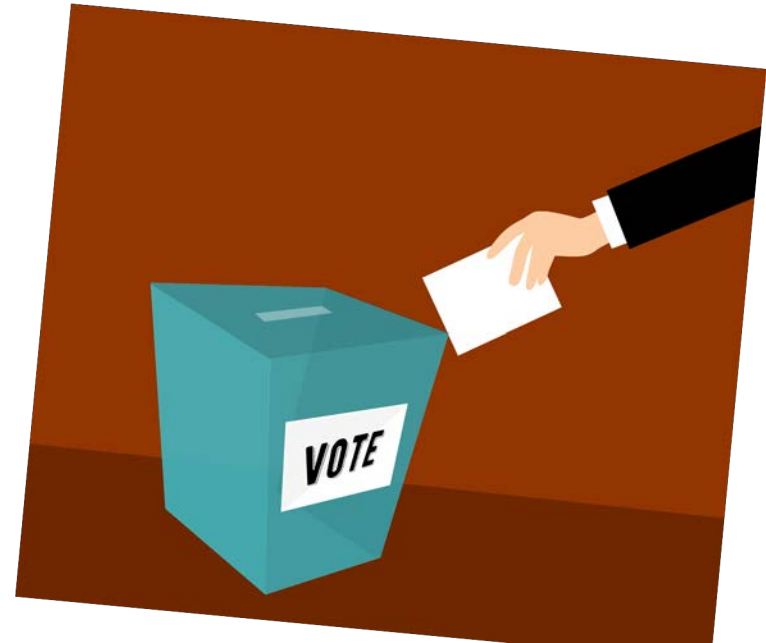
Other ideas?

What would make you feel connected to your peers right now?

CHAPTER ELECTIONS
(for student chapters)

Ways chapters transition leadership:

- Open elections (anyone can vote)

- Closed elections (ex: anyone who has attended at least 5 meetings can vote)

- Appointments

- How else?

CHAPTER ELECTIONS
(for student chapters)

Three Components to Think About:

- **Recruiting Candidates —**
  How do you nominate, recruit, or otherwise find/select the candidates for each position? Nomination forms, one-on-one calls with current position-holders, etc.?

- "**Campaigning**" —
  Chapters could hold digital events for candidates. These could be town-hall style where members ask questions, actual debates, or presentations by candidates.

- **Voting —**
  - Live-Time: Chapters could hold digital events where members all cast "ballots" at once using software like XXXXXX

  - Over Time: Using forms like Google Forms, JotForm, etc. members can vote by a deadline

CHAPTER ELECTIONS

(for student chapters)

Basically, you need to think about how to maintain your chapter's usual election practices while doing so digitally.

Don't reinvent systems that work; just think about how to adapt them.

CHAPTER ELECTIONS
(for student chapters)

Other suggestions?

Questions?

LEADERSHIP TRANSITIONS

The key question here is **how to transfer information to incoming leadership even if you can not meet in person.**

TOOLS:

- Trello
  - Project management
  - Can store and link documents

- Google Folders (and Google Docs)
  - Can share and change "ownership" of key documents, trainings, etc.

- National leadership and staff
 - We are here to help!

INFORMATION TO PASS ON:

- Chapter history

- University or College deadlines, expectations, etc.
  - When do you need to register as a student org? What is required for that?

- Documents like chapter constitutions

- Membership lists

- All passwords for chapter tools and systems

- National staff contact information!

LEADERSHIP TRANSITIONS

Trello board with personal responsibilities and information and archived documents about them.
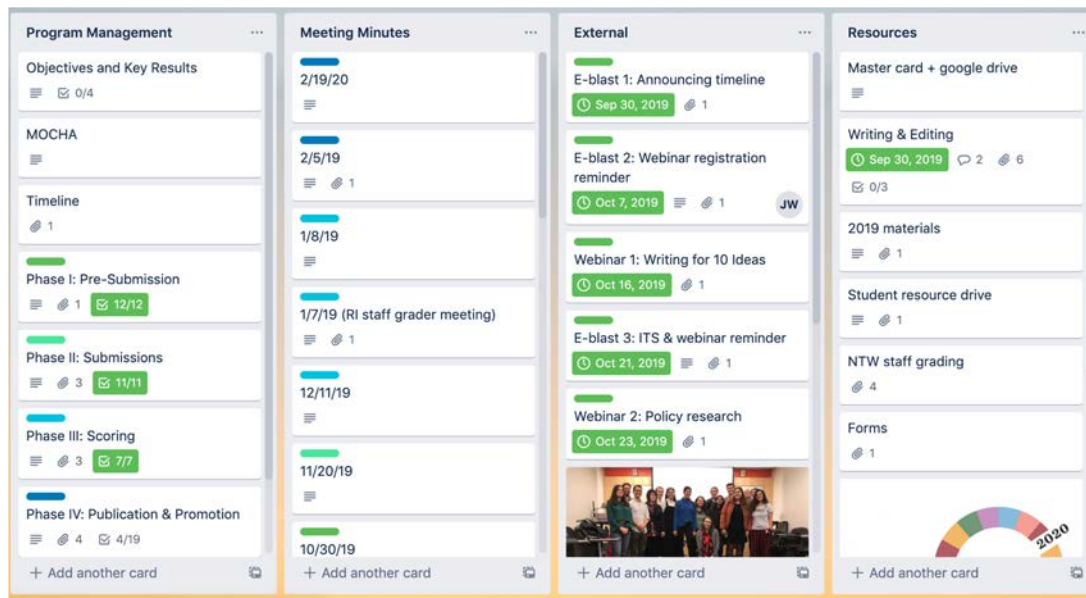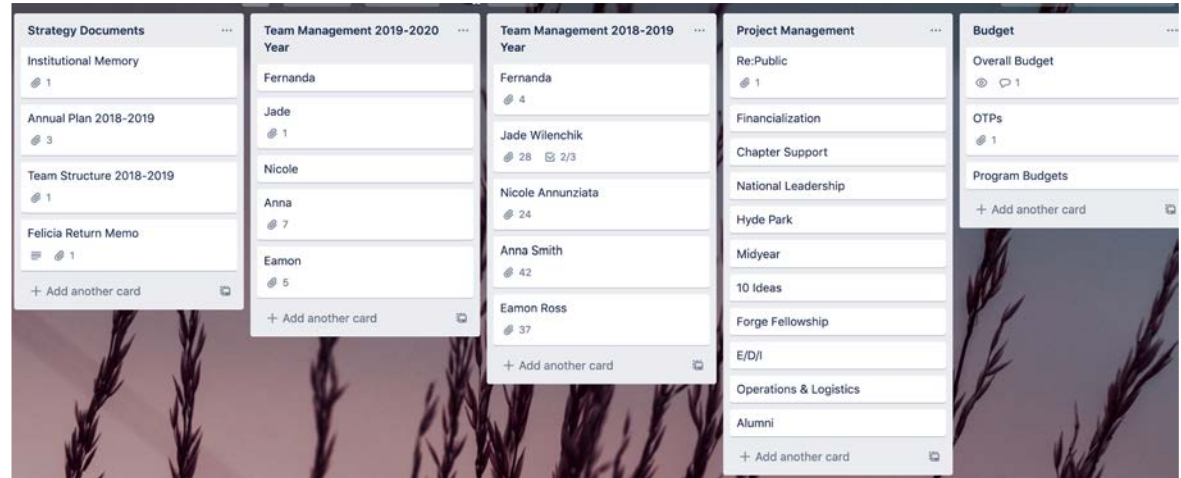
Project management trello board. (This is *10 Ideas*).
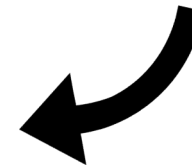
Other suggestions?

Questions?

Keeping the work going

We're in a time when people's needs are shifting incredibly quickly. Because of this, new, sweeping, policy decisions are being made very rapidly as well.

In addition to maintaining our other projects, we also need to show up to address the **immediate issues in our communities.**

Connecting with other orgs

- Keep an eye out for existing resources to stay connected with local and national-level organizations

- Reach out to orgs on your campus to start a digital communication platform
  - Map the orgs on your campus
  - Lead online check in calls
  - Discuss ideas on collaboration
  - Share resources - but fact check!

- Be active on social media

- Stay connected!

Continue to advocate

Discuss

- With other orgs on campus how to hold online meetings with the administration and other decision-makers
- What other digital forms you can use (joint emails, online petitions, online boards, other school groups…)

Share

- Share your work and useful resources
- Hold online panels (take advantage of our [alumni network](#)!), teach-ins, discussions

Support vulnerable groups

Students

- Housing
- Food insecurity
- Travel
- Income

Campus Workers

- Job insecurity
- Income
- (ex: Columbia, Northeastern)

Local Community

- Service providers
- Healthcare workers
- Elderly

Existing resources

- [Non-profit COVID-19 resource list](#)
- [Mutual Aid Network](#)
- [How to create a successful virtual event training](#) (free webinar)
- [Social Movement Technologies](#) (upcoming free webinars)
- [Digital Advocacy strategies](#)
- [Student Mutual Aid Network](#) (FB group and [slack channel](#))
- [Snopes Fact checking](#)

Let's build a plan.

We build plans so we can best understand:

What we want to achieve;

How to achieve it;
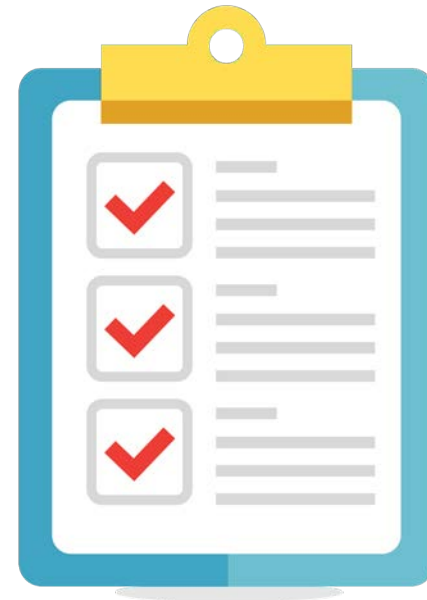
When we are going to achieve it; and

How to **measure success** and stay on track!

What makes a plan effective?

A work plan should include:

- Scope
- Time
- Resources
- Quality
- Communication
- Risk
- Stakeholder engagement

Building your work plan

Defining your role in your project and chapter:

–   What should be the **scope** of your role? What *can* it be in this moment?
–   **Who** are the people involved in it?
–   What are your main **responsibilities**?
–   What are the **resources** available to you?
–   What do you want to **achieve** by the end of your term?

Focusing on your Sphere of Control

What's within your sphere of control right now?

What proposals could you make?

What are **actionable** things that you can work on?

How can you build community and show up for others?

Turn Big Goals into Manageable Actions

Step 1: Identify Big Rocks	Step 2: Specify Next Actions	Step 3: Break down "Next Actions" into simple to-do's
Ex. Plan logistics for Nov. 6 Day of Action.	• *Ask Sue if she can she work on printed materials* • *Set up conference call with Billy, Marsha, and Al – what worked in Memphis, ideas here?* • *Draft schedule and assignments.*	• *Sue's number: 212-279-3434, call at 5pm.* • *Find last email from thread and flag it for your daily list* • *Print out last year's run schedule to work off of.*
1.		
2.		

Drawing a timeline

- When do things need to be done by?
  - Define target dates for KRs completion
    - Work backwards
  - Assess resources (people, things) needed in each activity
    - Detail as much as possible
- Buffer time is especially important, as is building a backup plan.

Hold a chapter meeting, listen to everyone's needs, list out our capacity to assist, power map

March

Hold chapter elections, begin on transitions, etc...

May

April

Start developing new research, hold a letter writing event, start preparing for chapter elections

June

Delegating tasks for the summer, setting up regular check ins with partners, etc.

	Month 1
Key Results	Finalize our preliminary list of variables and meet with stakeholders/professionals who can offer guidance/direction.
Weeks 1-2	Consult with professors: Andrew Rich (Pending), Carlo Invernizzi Acetti (5/7), James Fontanella (5/7), Vicki Been (Pending, see below note), Stuart Ward (5/6)
Weeks 3-4	Attend Count Me in Rally May 15, speak with people already involved in the topic (NYC Construction Union)
	Follow up with ND Group from Incubator (Pending)
	Dr. Been put us in contact with Matt Murphy and Mark Willis, contact them
	Attend May 10th Fundraising/Annual event with Center against anti asian violence
	Attend May 13th City Council Meeting on Housing and Buildings (Corey Johnson)
	Follow up with Rachel to Schedule a Call/Meeting
	Month 2
Weeks 1-2	Continue meeting advocacy groups, join coalitions
Weeks 3-4	Attend events and meetings with the Coalation on Anti-Asian Violence and gain from their expertise in the lower east side and chinatown
	Attend city council meeting for committe on housing and buildings in June to follow up on how the issue is developing. Monthly meetings.
	Month 3
Weeks 1-2	Finally perform analysis in July/August
Weeks 3-4	With the help of Stuart Ward, develop a viable model for statistical analysis with our refined list of variables (Follow up with Joe throughout the process)
	Evaluate and process the data following analysis

Tracking your progress

- Friday afternoon / Monday morning planning
- Revisit your goals and tasks
- Reorganize if needed
- Communicate, communicate, communicate!

Content Engagement
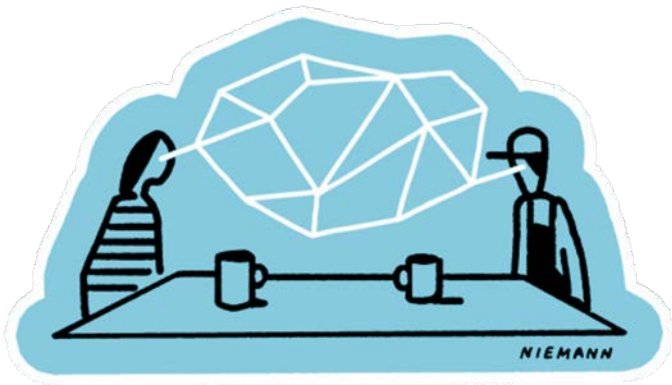
Engage people in a conversation about how they and their communities are doing. Are there any big changes individuals or organizations are dealing with?

Expand your universe; there is likely increased capacity for outreach in this moment.

Have tangible asks and leave space for others to talk about how they're envisioning this relationship. What do people have the capacity to do right now? Offer varied opportunities for engagement.

What issues have become more prevalent / visible in this moment? How can you and your team rise to meet that need?

Logistical Support
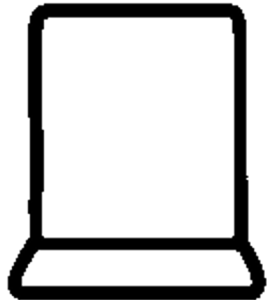
Allot extra time for technological hiccups. Have someone on the call who will just deal with these issues when they arise.

Draft your follow-up email beforehand and edit when appropriate after the call. It should include to-dos and contac info. Do not make people look for this information.

Be flexible. Not everyone has the necessary technology or infrastructure to hop on a video call, for example. Make sure you are being explicit and intentional when asking people what they need.

Utilize tools to keep people on track. Make sure there's a publicly available agenda, a Google calendar invite, etc. Working remotely can distort people's sense of time.

Make sure everyone on the call has a role. One person to provide tech support, one to make sure people are muted, one to field questions in the chat, etc.

Show Up However You Can

Compile and share local resources for support and mutual aid

Be empathetic and responsive

If you can, see what local volunteer services are available

Advocate for your locality to provide relief measures

Support local businesses and check in on their employees

Find ways to share joy across remote mediums and provide uplifting distractions!

If you are thinking about lobbying in your capacity as a Roosevelter* you <u>must</u> tell someone on staff before doing it.

i.e.: as a member of Roosevelt @ Michigan, as "Katie, Regional Coordinator," etc.

If you have never seen or attended our lobbying training, you should also do that before considering any lobbying action.

Email kkirchner@rooseveltinstitute.org.

Remote lobbying tools

There are lots of ways you can still engage with decision makers – whether they are your elected representatives or school administrators.

# Remote lobbying tools

Petitions

Petitions help us demonstrate to decision makers that a critical mass of people are ready to fight for a particular issue.

You can use platforms like Change.org or Moveon.org to host your petitions.

Send letters & emails

You can organize letter and email writing drives virtually with your members and others around you. **You can write the script that folks need to send and provide them with clear instructions.**
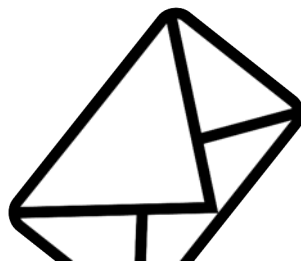
Phone banking

Similar to letter writing, **you can write a script and give folks clear instructions about how to call decision makers.**

What tactics does your chapter usually use to foster relationships and find allies? How can those be adjusted to be responsive to this moment?

Reach out!

Katie Kirchner

kkirchner@rooseveltinstitute.org

Fernanda Nogueira

fnogueira@rooseveltinstitute.org

Jade Wilenchik

jwilenchik@rooseveltinstitute.org

Nicole Annunziata

nannunziata@rooseveltinstitute.org