TRAINERS' HANDBOOK

STUDENT DIVESTMENT WORKSHOP

JANUARY, 2013

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TIME	SECTION	GOAL
45 minutes	Introduction: Divestment & Reinvestment Operating Theory of Change	Participants meet each other; Alignment on why we're doing this work; Clarity on theory of change
50 minutes	History of Divestment	Gain a better understanding of the history of divestment; Learn new tactics; Understand their own role in this movement
2.5 hours	Campaign Strategy	Choosing smart campaign goals; Understanding power; Defining strategy; Understanding timeline of a campaign and escalation; NVDA 101; Employing tactics; Evaluating your work
2 hours	Organizing	Understand different styles of leadership, organizing roles, best practices for recruitment and retention, meeting facilitation, negotiating privilege, difference, and power in a group
1.5 hours	Endowments 101	Understand the structure of the endowment; Be able to differentiate asset classes; Identify reinvestment strategies for universities after divestment
2 hours	Working with New and Traditional Media	To build the skills of a team in working with and pitching stories to reporters, interviewing well, and planning a media strategy. Expand the toolbox
1.5 hours	Negotiating with Power	Understand that meeting with decision makers can be used either to collect information or demonstrate power and win campaign victories. Learn that meetings are part of greater campaign strategy, specifically as related to their targets and campaign goals. Have learned common divestment arguments and responses. Learn the negotiation

		process. Practice using the process. Feel confident about negotiating with decision-makers
30 mins	**Close**	**Leave feeling empowered and have clear next steps**

KEY:

 **= SAY THIS**

 **= DO THIS**

 **= NOTICE THIS**

INTRODUCTION: OUR THEORY OF CHANGE

TOTAL TIME = 45 minutes

GOALS

- **Participants meet each other**
- **Encourage good group dynamics for the training: participant responsibility for learning and growth, self-disclosure, team-building**
- **Alignment on why we're doing this work**
- **Clarity on theory of change of the coalition and your own**

HOW TO PREPARE

- **Set up the room and arrange the chairs in a circle (or you can sit on the floor)**
- **On large sheets of newsprint write:**
  - **Agenda and workshop goals**
- **Photocopy the handouts:**
  - **Fossil Free Campaign: Divestment & Reinvestment Theory of Change**
- **Materials needed:**
  - **Flipchart**
  - **Markers**
  - **You!**
- **Prep with your co-facilitator. Get to know each other's training style and strengths**
- **Check in with the organizer of the training to find out more about the group's experience level, the makeup of the group, and to confirm logistical arrangements.**

OVERVIEW

TIME	EXERCISE	GOAL	DESCRIPTION
15 minutes	Go around: why you're here and one thing you're excited to get out of the training	Participants get to know each-other and reflect on their personal goals	Go around
20 minutes	Game: Great wind blows (or fill in your own)	Get blood flowing, prepare people's brains and bodies for the training	Interactive game that helps participants in self-disclosure: revealing something about themselves, run around and play, set a comfortable tone for the workshop
10 minutes	Introduction to our Theory of Change	Understand the strategy and theory of change behind the national campaign effort	Presentation of the theory of change behind the campaign

Trainer's note: ***you can do the go around in different ways, but it's important to make sure everyone's voice is***

heard and you understand how people think this campaign is going to be effective, and they understand how we think it is going to work, so that folks are prepared for what we are going to talk about for the rest of the training, and that we're realistic in how it goes.

Part 1: Getting to know each other

Hi, so great to see all of you here. We're so excited about this campaign and we're so excited to that all of you are here to make it happen. First, we're going to go over the agenda (go over your agenda). Any questions? Alright, now we're going to do a quick go around to get to know everyone. Can each person tell us their name, preferred gender pronoun and one thing they are excited to get out of this training.

Part 2: Fun Game

A Big Wind Blows

Get the group sitting in a circle. Make sure that there are no notebooks, chairs, cups or other things in the center of the circle that people could trip on during the course of the game. There should be one less chair or spot in the circle than people playing the game.

Stand in the middle of the circle and explain the game. In this game, one person will be in the middle. Whoever is in the middle will say, the Big Wind Blows for….. and finish that sentence by saying one thing that is true about themselves. You can model a few examples, such as 'The Big Wind Blows for anyone who has a sister' or 'The Big Wind Blows for anyone who likes to swim'. The main thing to emphasize is that the person in the middle must say something that is true about themselves.

<u>Trainer's Note:</u> you can model the amount of self-disclosure you want to encourage. For example, in a short workshop full of strangers, you may want to share something benign because the purpose of the game would be just to get people moving and have fun. But if you are with a more tight-knit group, you could say "the great wind blows for anyone who is nervous that we might not win." Offering doubts, fears, inspiration, excitement, are all sentiments you can encourage participants to share well.

Once the person in the middle has made this invitation, everyone in the circle who identifies with that statement must get out of their seat and find a new one. They cannot move to an open seat right next to them, they must move more than one seat over from where they are sitting. The person in the middle must also try to get into one of the seats. This means that a new person ends up in the middle, and then that person gets to come up with a new "Big Wind Blows for…"

The game continues this way until a good number of people in the group have had a chance to be in the middle or until the facilitator calls time. As the facilitator, it's a good idea to pay attention to how people are engaging in the game. Are people energetic or hesitant? Are people using statements to finish the sentence that are very surface level or that are more vulnerable ('The Big Wind Blows for everyone who is wearing sneakers' vs. 'The Big Wind Blows for people who have been in an abusive relationship'). Whatever the energy is and whatever level people are sharing at is ok, but you'll want to pay attention because it may give you some indication of what people are feeling, level of safety in the group and what to expect for whatever you have planned next. It is best to call time before people start to lose interest, while the energy is still high.

As a facilitator, you may decide to modify the game in other ways to accommodate particular needs around physical ability. Be aware of people's needs in the group.

<u>Trainer's note:</u> If the group expresses a lot of vulnerability in their self-disclosure, you may have the sense after playing the game that it might be useful to spend time debriefing it before moving to the next activity. One option is to get people into pairs or small groups after the game is over to spend another 10-15 minutes debriefing it.

Part 3: Theory of Change

This campaign is part of a national effort, and there has been some work done to flesh out why we're doing it - our "theory of change" about why this kind of campaign will have an impact. I'd like to share that document with you all now.

Pass out handout and have everyone read silently.

Even though that is the National theory of change, our campus and our group might be doing this for slightly different reasons - in fact, there are lots of ways divestment can be impactful, so lets discuss this a little bit now. Are there things you disagree with? Anything you would add to this?

Scribe new ideas or disagreements on the chart. Attempt to synthesize them to come to alignment about this group's theory of change.

If you are doing this workshop in a coalition space with more than one group present (such as a regional gathering), you might say:

While this campaign has lots of different partners focusing on different issues and goals, we all acknowledge that necessity of challenging the fossil fuel industry, the investment system, and building a broader understanding of the need for a more sustainable financial system. Not everyone has to be on the same page--it's just important for everyone to understand where we are all coming from, so we can work together.

Trainer's Note: Not every campus is going to have the same theory of change, but it is important for each campus to have internal alignment about why it is taking on the campaign.

FOSSIL FREE CAMPAIGN: DIVESTMENT AND REINVESTMENT THEORY OF CHANGE

We're seeing the impacts of the climate crisis all around us, from terrible drought and wildfires to super-storms like Hurricane Sandy. We also know that climate change isn't the only negative impact of our reliance on fossil fuels: from Appalachian communities destroyed by mountaintop removal coal mining to kids growing up with asthma from the diesel fumes in their city, people around the world are harmed by this industry each and every day.

We know that we can make the transition away from fossil fuels: the promise of renewable energy has never been brighter. But anytime our government begins to act, the fossil fuel industry spends millions of dollars to block progress. They're stranglehold on our government and economy is the biggest obstacle to climate progress. We won't be able to prevent climate catastrophe unless we can weaken their influence.

Fossil fuel divestment is a powerful way for us to build a movement to confront this rogue industry. Divestment helps show that climate change is a deeply moral issue and forces influential people and institutions to take sides in this fight. It helps damage the reputation of the fossil fuel industry by showing them as opposed to young people who are fighting for their future: together, we can make Big Oil the Big Tobacco of our generation. Divestment also opens up the political space for action by mobilizing a new generation of climate activists and keeping climate in the media spotlight. Economically, divestment raises questions about the long-term viability of the fossil fuel industry and increases demand for new, environmentally and socially responsible investments.

We've seen divestment work before, most notably in the fight against apartheid South Africa in the 1980s. Now, it's time for a new generation to take up this powerful tool and get to work saving our common future. Here are some of the additional impacts of this campaign:

- **Helping a generation understand the impacts of the fossil fuel industry and prepare them to confront the industry and its power directly**
- **Create a national conversation around fossil fuels extraction and burning, and through raising the issue demand real policy change**
- **Through the act of divestment and other changes lead the investment industry away from fossil fuels, thereby increasing the industry's costs of doing business and making it more difficult for them to operate with impunity**
- **Move endowment dollars towards places they can have a real impact including energy efficiency, community investment and sustainability, and other impact/sustainable investments**
- **Drive long-term change in the way that endowments and investments are moved towards building a sustainable and socially just economy**
- **Train students and the broader community about the importance of the way that money moves and the role endowments and institutional investors have to play in it**
- **Help build a broader and more diverse movement for social and environmental justice**

HISTORY OF DIVESTMENT

This training focuses the history of Responsible Investing in the United States at the university level with an emphasis on apartheid divestment. It is a training that should serve as an introduction to a deeper conversation about strategy, tactics, and goals.

TOTAL TIME = 50 minutes

SECTION GOALS

- **Gain a better understanding of the history of divestment as a strategy for creating social change [Knowledge]**
- **Learn new tactics for achieving success based on historical examples [Skill]**
- **Feel more confident in their ability to explain the strategy of divestment to others and understand their own role in this movement [Attitude]**

HOW TO PREPARE

- **Set up the room and arrange the chairs in a circle**
- **On large sheets of newsprint, write up:**
  - **Agenda and workshop goals**
- **Photocopy the handouts:**
  - **Divestment Timeline (only enough for trainers)**
- **Materials needed:**
  - **Flipchart**
  - **Markers**
  - **Prepped timeline with images representing each case (there's a written timeline below with descriptions and key dates in bold).**
  - **Optional: Cards describing campaign tactics and meetings for the Campaign Timeline exercise**
- **Prep with your co-facilitator. Get to know each other's training style and strengths**
- **Check in with the organizer of the training to find out more about the group's experience level, the makeup of the group, and to confirm logistical arrangements.**

OVERVIEW

TIME	EXERCISE	GOAL	DESCRIPTION
5 minutes	Introduction	Learn the importance of history to determine future action.	Use examples from your own experience to tie this training to a significant moment in your own organizing history
30 minutes	Movement in Context	Learn new tactics for achieving success based on historical examples	Highlight important dates on the divestment timeline
15 minutes	Debrief and Recap	Reflection and take-aways from the exercises	Write responses to questions on flip chart

INTRODUCTION

5 MINUTES
HANDOUTS: None

GOALS

- **The importance of history: How can we learn from past organizing.**

MATERIALS

- **Flip chart**
- **Markers**

RUNNING THE EXERCISE

Use examples from your own experience to tie this training to a significant moment in your own organizing history. Ex. When I first began organizing, a mentor walked me through the steps of the Montgomery Bus Boycott to demonstrate goals, strategy, and tactics. Historic campaigns and victories are essential tools for learning what has worked and what has failed in the past to guide future strategies and create a sense of intergenerational solidarity as people working for a vision of a better future.

In this space we are going to follow the history of divestment and responsible investing to try and draw out strategies, tactics, and other vehicles for change. During this training pay attention to patterns within different campaigns which repeat themselves. This training has a lot of dense content, I encourage you to find ways to make this "history" relevant to current campaigns.

MOVEMENT IN CONTEXT

30 MINUTES
HANDOUTS: None

GOALS

- **Learn new tactics for achieving success based on historical examples**

MATERIALS

- **Flip chart with Divestment Timeline written on it (included in this curriculum)**
- **Markers**

RUNNING THE EXERCISE

Present the timeline you wrote on the wall. Below are example dates and context. Walk the group through it step by step, offering any anecdotes that are relevant.

<u>Apartheid (Context) Case Study Timeline:</u>
Set the context: What is apartheid? (Info below designed to help you lay out a picture of what south africa under apartheid looked like http://www.un.org/Pubs/CyberSchoolBus/discrim/race_b_at_print.asp)

- **1951:** The Bantu Homelands Act. Through this law, the white government declares that the lands reserved for black Africans are independent nations. In this way, the government strips millions of blacks of their South African citizenship and forces them to become residents of their new "homelands." Blacks are now

considered foreigners in white-controlled South Africa, and need passports to enter. Blacks only enter to serve whites in menial jobs.

- The African National Congress (ANC), a political organization for Africans, encourages peaceful resistance to the discriminatory laws of apartheid. The ANC issues a Freedom Charter that states, "South Africa belongs to all who live in it, black and white, and that no government can justly claim authority unless it is based on the will of the people." The government reacts by arresting people and passing more repressive laws.
- **1952:** Abolition of Passes and Coordination of Documents Act. This misleadingly-named law requires all Africans to carry identification booklets with their names, addresses, fingerprints, and other information. (See picture at right.) Africans are frequently stopped and harassed for their passes. Between 1948-1973, over ten million Africans were arrested because their passes were "not in order." Burning pass books becomes a common form of protest.
- **1960**: A large group of blacks in the town of Sharpeville refused to carry their passes. The government declares a state of emergency and responds with fines, imprisonment, and whippings. In all, 69 people die and 187 people are wounded. The African political organizations, the African National Congress and the Pan-African Congress, are banned.
- **1970s:** Resistance to apartheid increases. Organizing by churches and workers increases. Whites join blacks in the demonstrations.
- **1970s:** The all-black South African Students Organization, under the leadership of Steven Biko, helps unify students through the Black Consciousness movement.
- **1976:** The Soweto uprising: People in Soweto riot and demonstrate against discrimination and instruction in Afrikaans, the language of whites descended from the Dutch. The police react with gunfire. 575 people are killed and thousands are injured and arrested. Steven Biko is beaten and left in jail to die from his injuries. Protesters against apartheid link arms in a show of resistance.
- **1980s:** People and governments around the world launch an international campaign to boycott (not do business with) South Africa. Some countries ban the import of South African products, and citizens of many countries pressure major companies to pull out of South Africa. These actions have a crippling effect on the South African economy and weaken the government. The picture on the right shows a demonstration against the company Chase Manhattan.
- · **1980s:** Hundreds of thousands of Africans who are banned from white-controlled areas ignore the laws and pour into forbidden regions in search of work. Civil disobedience, demonstrations, and other acts of protest increase.

<u>Divestment (General) Timeline:</u>

- Explain in Chronological Order: (Bold: **IMPORTANT)**
    - **1960's** Faith communities begin pushing for divestment from companies invested in South Africa when other methods of engagement fail.
    - *1972: Dow Chemical shareholder resolution to protest the manufacturing of napalm during the Vietnam War.*
    - *1973: Created the Interfaith Center on Corporate Responsibility which advocates for corporate responsibility and shareholder engagement.*
    - **1977:** Hampshire University becomes the first university to divest from apartheid
    - **1977:** General Motors develops the Sullivan Principles. The principles demanded the equal treatment of employees regardless of their race both within and outside of the workplace, demands which directly conflicted with the official South African policies of racial segregation and unequal rights. More than 125 corporations adopted the principles, but by the early 1980's the creator of the Principles agreed that they were not enough to make the change needed.
    - **1984:** 53 Universities divested
        - Tactics: Sit ins, occupations, shanty towns many focused on getting national media attention.
    - **1986:** The Comprehensive Anti-Apartheid Act: imposed <u>sanctions</u> against South Africa and stated five preconditions for lifting the sanctions, including establishing a timetable for the elimination of

apartheid laws and the release of political prisoner Nelson Mandela.
- *1987: 128 universities divested*
- **1988:** 155 universities divested.
- **1989:** 26 states, 22 counties and over 90 cities had taken some form of binding economic action against companies doing business in South Africa
    - Tactics: Sit ins, occupations, media
- **2004:** Sudan divestment campaign launched at Harvard
- *2004: 5 college students founded network of student endowment action (would become REC). Within a few months, the founders assembled a coalition of 40 schools with combined endowments of more than 102 billion dollars.*
- 2005: BDS campaign launched
- **2007:** President Bush signs the Sudan Accountability and Divestment Act
- *2007: Macalester University moves $500,000 into community banks*
- **2008:** HEI non-reinvestment campaign launched on campuses
- **2008:** 61 campuses divested from Sudan
- *2009: After pressure from Bard College students, McDonald's Corporation has agreed to formally survey and promote best practices in pesticide use reduction within its American potato supply chain.*
- **2010:** Swarthmore students launch first fossil fuel divestment campaign
- *2010: Loyola University of Chicago achieves victory on MTR financing from JP Morgan Chase.*
- **2011:** Roughly 20 campuses working on fossil fuel divestment campaigns
- *2012: Case Western Reserve is currently an example of multi sector community investing and they are working with community partners in cleveland to provide high speed internet to residents, create jobs through various partnerships that include universities laundry services. Investing nearly $850 million into NE Ohio*
- **2012:** As of December 2012, 192 universities have begun advocating for divestment from the fossil fuel industry.

Elicit answers from the group:

- Did you notice any patterns in the divestment campaigns noted above?
    - Answers: Perhaps that many of the campaigns started out slowly and gained momentum over time that escalated as media pressure and actions grew. Also, many of the divestment campaigns were followed by national policy change. (Follow up: What might be the next stages of this campaign? Price on carbon etc.) Peaks and valleys in the Anti-Apartheid campaign align with historical events in SA like the Hampshire victory following the Soweto uprising.
- What happened to the students running those campaigns? How might we use historical campaigns to inform our outreach to alumni, faculty, and admins?

DEBRIEF AND RECAP

15 MINUTES
HANDOUTS: None

GOALS

- **Reflection and take-aways from the exercises**

MATERIALS

- **Flip chart**
- **Markers**

RUNNING THE EXERCISE

Ask participants the following questions and write their responses on the flip chart.

- What were some of the key takeaways from this training?
- How can we apply lessons from other campaigns to the fossil fuel divestment campaign?
- How is divestment used as a tactic? How is it used as a goal in and of itself?

CAMPAIGN STRATEGY

A campaign is composed of a series of activities intended to achieve a particular outcome that furthers our larger social change vision. Like a story, campaigns have a beginning, middle and end – setting goals, waging the struggle, and eventually winning – as well as "characters" like protagonists, antagonists, and allies.

This workshop focuses on defining a campaign and building skills to create your own campaign. The skills include setting specific goals that lead to larger outcomes, power mapping to identify targets, strategies, and leverage points, and evaluating a campaign.

***Trainer's Note:* You can pick and choose different pieces of this training, and you can also shorten sections if time is limited. The basic parts you'll want to include would be sections on defining goals, defining strategy and breaking down a campaign into smaller parts (tactics and timelines).**

TOTAL TIME = 2 hours 30 minutes

GOALS

- **Learn to choose smart campaign goals**
- **Understand power**
- **Define strategy**
- **Understand timeline of a campaign**
- **Learn the role of escalation and Non-Violent Direct Action (NVDA)**
- **Learn to employ tactics**
- **Learn to evaluate your work**

HOW TO PREPARE

- **Set up the room and arrange the chairs in a circle**
- **On large sheets of newsprint, write up:**
  - **Agenda and workshop goals**
  - **Spectrum of Allies**
  - **"Protest" "Intervention" "Noncooperation" "Creative Solution"**
  - **Target Setting Bullseye**
  - **SMART model**
- **Photocopy the handouts:**
  - **"How to Build a Campaign" handouts**
  - **Ruckus Action Strategy Guide**
  - **Spectrum of Allies**
  - **Smart Goals**
  - **Target Setting**
- **Materials needed:**
  - **Butcher block**
  - **Markers**
  - **A blanket**
- **Prep with your co-facilitator. Get to know each other's training style and strengths**
- **Check in with the organizer of the training to find out more about the groups experience level, the makeup of the group, and to confirm logistical arrangements.**

OVERVIEW

TIME	EXERCISE	GOAL	DESCRIPTION
20 minutes	**Blanket Game**	**Get to know the parts of a campaign and discuss decision-making processes**	**Participants engage in a challenge to flip a blanket over, debrief**
75 minutes	**Vision / Goal / Strategy / Tactic, NVDA & campaign arcs**	**Define terms, understand campaign arcs, escalation and the basics of non-violent direct action**	**Debrief blanket game into a description of campaign arcs, escalating tactics, definition of terms, and understanding of NVDA**
15 minutes	**Bullseye: target setting**	**Understand power mapping a target, listing primary, secondary, and tertiary targets**	**Use bullseye model on flipchart to map out hypothetical power holders for a university**
15 minutes	**SMART Model: goal setting**	**Understand how to set short, mid, and long term campaign goals**	**Describe and practice SMART model & critical paths**
25 minutes	**Spectrum of allies**	**Understand how to map allies and make strategic considerations to grow a base**	**Presentation of tool, using Freedom Summer example and Simpsons example**

WHAT IS STRATEGY: THE BLANKET GAME

20 MINUTES
HANDOUTS: Ruckus Society Action Strategy Guide

GOALS

- **Define vision, goals, strategy, tactics**
- **Talk about decision-making processes, allies and other potential campaign concepts that come up in the exercise**

MATERIALS

- **A medium sized blanket (small, if it's a small group)**

RUNNING THE EXERCISE


Spread the blanket on the floor. Tell the entire group to stand on the blanket. (The blanket is the right size if the group is slightly packed on the blanket; if it's too big you can fold it in half.)


This is a group challenge. The group must flip the blanket completely over while standing on it, without anyone stepping off the blanket. No one may leave the blanket, lean on the walls, or use any other props. Pretend the floor is hot lava! Also, just for safety, don't stand on each other's shoulders. If someone steps off the blanket, you will

have to start over again.

See if there are any questions for clarification. Don't help people figure out how to do it – just make sure they understand the rules. Do not answer questions beyond rule clarification, just say "the rules have been stated." Then, step back and let the group take on the challenge. Be sure to remind people about the hot lava.

<u>Trainer's note:</u> if you have a large group (more than 15 people), you can "fishbowl" the exercise - meaning that 15 or so people stand on the blanket, and everyone else is an "observer." Make sure that observers understand that they are participating - this is an active role. For example, participants may choose to ask advice from observers, this is allowed (but do not suggest it, see if they decide that on their own). Later, during the debrief, ask the observers to reflect first before you ask the "blanket flippers" to reflect.

Watch the group to see if anybody steps off the blanket. If so, enforce the rule and tell the group to start over again. While you're doing this, pay attention to how the group makes decisions and picks its strategy for handling the challenge.

Once the group succeeds, give folks a chance to celebrate. The vast majority of groups succeed at this task within a few minutes. But if after 15 minutes they still haven't turned the blanket over, feel free to interrupt them because of time. If they are unable to complete the task, affirm them that its okay - in many ways the learning is more valuable if they do not complete it, so its not a "failure" of the activity.

Pretty much all groups end up flipping the blanket over by moving to one side of the mat and twisting the un-stepped on part of the blanket over, then walking back to that side. Some groups do more of a folding, rather than twisting, but trial and error usually lead to one of these two. You can refer to the twisting as the "bowtie strategy" when you are ready to name it.

DEBRIEF: So, how was it? What happened at first? Then what happend? *Then* what happend? What helped your group succeed at the task? (Or, if they weren't successful) What seemed to be working?

To get at GOALS, STRATEGY, TACTICS: What was the goal in that game? What was your analysis of the situation? What was your strategy to achieve the goal? What were your tactics? Did you change them over time? How did you decide to do that?

(If group's not getting it). In this case, I gave you the goal – flip the blanket over. You devised a strategy or a method to achieve the goal (probably the bowtie or folding strategy); and you experimented with tactics or particular ways to implement your strategy, such as one person twisting, others stepping, others holding on to each other, others giving information, etc. You evaluated along the way to see if your tactics helped you to achieve your goal (and may have changed them if they weren't working).

Name that some of the tactics were "task oriented" to get the job done (like twisting and stepping), and others were "maintenance oriented" (like holding on to each other, communicating, and cheering each other on). Both are important for a campaign - some tactics (and leadership styles) hold our group together, while others move us forward to our goal.

If you notice that the group has some decision-making issues (like one person deciding how to do it and bossing others around), you might decide to explore the idea of decision-making structures (consensus, democracy, dictatorship, etc). Encourage groups to reflect on their own experience with elicitive questions like "what did it feel like when ____ happened?" Stay in their own experience before generalizing or getting theoretical.

Help connect this scenario to the real world. See if folks can come up with example of strategy or goals with respect to actual campaigns.

What are some examples of real-life campaigns? What are their goals, strategies and tactics?

One other way to explain the difference between goals, strategies and tactics: Goal, you want to move a big boulder. Strategy, you have two choices, push the boulder aside, or forklift it somewhere else. Your tactics would be different depending on the strategy, right? If you decide to push it, you might have five people lift weights for a week and then yell 1,2,3 Push! For strategy two, you'd go out rent a forklift, learn how to use it, and move the boulder.

CAMPAIGN TERMINOLOGY
Vision: The world we want to live in (visions are big, bold, radical, and transformational)
Goals: What we think our group can accomplish to solve a specific problem (goals are concrete)
Target: The person or entity that can give us what we want.
Strategy: The plan, or way we'll get there.
Tactics: The individual actions we take to implement the strategy to force the target to give us what we want (our goal).
Affected Communities: The people impacted by this issue.
Allies: The people who will be down to help.

TACTICS SHOULD BE INFORMED BY STRATEGY! Many activists get stuck doing lots of diverse tactics that don't necessarily follow their strategy and lead to achieving their goal.

The Blanket Game comes from trainer Nadine Block based in Washington, DC. Aspects of Strategy based on School of Unity and Liberation's Political Education Workshop Manual. Adapted by Joshua Kahn Russell with the Ruckus Society www.schoolofunityandliberation.org.

WHAT IS STRATEGY: CAMPAIGN ESCALATION

30 MINUTES
HANDOUTS: Ruckus Action Strategy Guide

GOALS

- **Place definitions into a visual**
- **Understand the arc of campaigns**

MATERIALS

- **Flip Chart**
- **Markers**

Trainer's note: ***this design is meant to complete the debrief of the Blanket Game activity.***

RUNNING THE EXERCISE

Draw a campaign timeline on flip chart:

We start at point A, which is where we're at now. We have a vision of the world we want to create. Visions are big, bold, transformative, and radical. We have a goal, which is a concrete thing we think our group can achieve to solve a problem, that pushes us closer to manifesting our vision. On one hand, we need our goals to be informed by our vision, or else we are just doing small peacemeal reforms that don't change the world. But we need goals that are concrete, or else we're living with our heads in the clouds. Then we have a line from point A to our goal. This is our path - our plan - our strategy. Our strategy has stepping stones along the way - these are our tactics. Our tactics bring us to our short, mid, and long term goals.

Arrange the group in a circle and tell the group that we will toss a ball (or any small object). When someone catches the ball, have them list a kind of tactic. Be clear that they are allowed to "pass" if they cannot think of one. Clarify that they should be listing kinds of tactics, not specific ones (such as "strike" not "the Flint Sit Down Strike").

Things people might shout out:

- **Letter writing**
- **Making phone calls**
- **Getting signatures**
- **A sit-in**
- **A lock-down**
- **A parade**
- **A teach-in**
- **Writing a report**
- **Writing a letter to the editor**
- **And hundreds of others**

Point out that early in campaigns we often use educational tactics to inform and build our base - like teach-ins, speaking events, and film screenings. As we build a bigger base, we can then mobilize that base - with rallies that show our power. As a campaign escalates we then meet with power holders and ask them for the change we want. If the power holders do not meet our demands, we then continue to mobilize our base with pressure tactics. Later in the campaign our tactics leverage power to pressure our target, and use protests, media, sit-ins and non-violent direct action to win our demand from our target.

Move out of the circle, and turn your attention back to the flip chart. Harvest examples that fit under the rubric of "non-violent direct action." Define acronym "NVDA." Ask for more examples of direct action.

Explain the "stages of a campaign" arc in the diagram, and that we often use educational and base-building tactics early in a campaign, and turn up the heat later in a campaign. Pressure tactics include NVDA.

Here's a working definition of non-violent direct action: "Tactics and strategies for social change, outside of institutional channels, using methods of protest, intervention, non-cooperation, and creative solution, without use of injurious force, to achieve systemic change."

Ask the group to digest this and offer clarification. Tell them to look at the list of tactics on the final page of the "Ruckus Action Strategy" guide. Ask them if they can name major direct actions in the climate movement.

Trainer's note: ***Recent recognizable actions include: the Tar Sands Action against the Keystone XL in DC, Tar Sands Blockade, Tim Dechristopher's monkeywrenching of an oil and gas lease, Indigenous road blockades with #IdleNoMore, and others.***

List the following categories on flip chart:

Here are 4 categories that can help us understand the utility of NVDA.

- **PROTEST**: registering your dissent. Examples: rallies, marches, banner hangs, critical mass.
- **INTERVENTION**: intervening in a system to inhibit its ability to function. Examples: sit-ins, occupations, blockades, die-ins, lock-downs, tree-sits.
- **NON-COOPERATION**: withdrawing your support from a system, inhibiting its ability to function. Examples: strikes, boycotts, fasting, walk-outs, refusal to obey un-just laws.
- **CREATIVE SOLUTION**: meeting your own needs directly, without the use of the system. Examples: Food not bombs, freedom schools, clinic defense, occupy Sandy.

Ask if the group has any other tactics to add to the list. Draw a "T Chart" on a sheet of butcher paper "PROs" and "CONs" of NVDA. Ask group to list potential pros and cons of using escalated tactics. Harvest the list and point out that when we do NVDA in its appropriate context, we can minimize potential 'cons', and maximize potential

'pros'.

In what context might our campus use escalated NVDA tactics?

Trainer's note: ***usually a group will propose a sit-in in a president's office, a rally, an occupation of a board of trustees meeting. Encourage them to not jump to these tactics too early, but not shy away from them when they are needed. Let them know that direct actions need to be well-planned, but student groups do them all the time, and they need-not be intimidated. If groups need support in planning a direct action, they can email joshua@350.org for training and resources. Good resource pages include: www.praxismakesperfect.org, www.ruckus.org, and www.trainingforchange.org***

Answer any clarifying questions.

Campaign Timeline activity was adapted from George Lakey's "5 stages for social movements" by Jessica Bell and Joshua Kahn Russell for the Ruckus Society. Direct Action definitions from Hannah Strange, Ruckus Society and Daniel Hunter, Training for Change.

TARGET SETTING: THE BULLSEYE

15 MINUTES

HANDOUTS

- **"Target Setting"**

GOALS

- **Determine campaign target & their influencers within a campaign context**

DESCRIPTION

- **By choosing a target and looking at who has influence over that person, the group can clarify who they should direct campaign activities towards.**

MATERIALS

- **Flip Chart**
- **Markers**

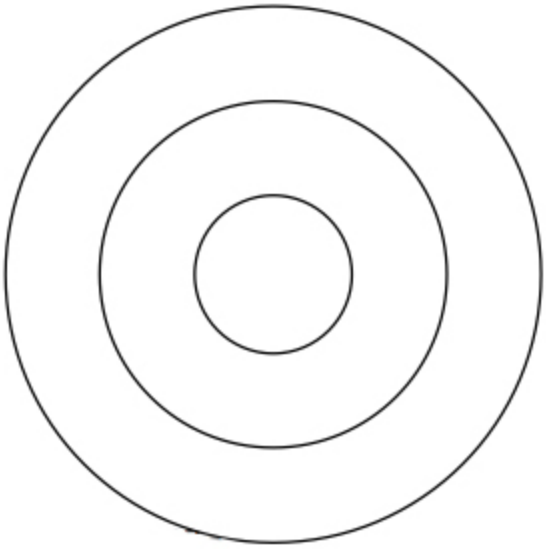
RUNNING THE EXERCISE

Every campaign must have a clear target. Remember, a target is a person who can be forced to give you the goods. They are a decision maker. Institutions, like the US government, or corporations, like Chevron, are not clear targets, because they are large and vague. But individuals within those larger groups, like the US President, or the CEO of Chevron, are clear targets. For campus divestment campaigning, the institution is usually the Board of Trustees Investment Committee members, The President, Investment Manager, or the Chief Investment Officer. There are many individual decision-makers at play, and it will look different for each campus - individuals within the administration (like the University President), or individual members of the board.

Ask the group to state their divestment goal for campus.

Who is our target for that campaign? Who is the ultimate decision maker?

Draw a “bullseye” target (see diagram), and write the name of the campaign target in the center ring.



Every target has people who influence their decisions. Most decision makers have a small circle of people close to them that have a lot of influence over them. Let’s name those people. Be specific.

Write the names of these influencers, or secondary targets, in the next ring out.

Sometimes during this phase, the group discovers that the target they initially chose is not the actual decision maker for their goal. Often, groups place the issue’s most politically influential or most powerful person in the center. When exploring secondary targets they may find out who the real target should be. If this happens, just write the correct name in the center and continue. This is a time to notice that the group may not actually have enough information to make this decision - name it as a value of the tool - it lets you know where you need to do more research.

Trainer’s note: ***This is a good time to share a short story of a campaign that had to adapt and shift its target, if you have such a story in your own personal experience.***

This group of people we have just identified are known as secondary targets. In a campaign, it can be helpful to know who these secondary targets are, because they could be more accessible to us. If we can’t directly get the target to change their position, we can pressure the secondary targets to influence our campaign target to make a decision in our favor. Smart campaigners direct at least some of the campaign activity to a well-chosen secondary target.

Of course, the circle of influence can expand even further, to include tertiary, or third-level targets. These people probably don't have direct influence over the campaign target, but they do have the ear of the secondary targets and could be helpful in our campaign. Let's list some of those people or groups. Again, we need to be specific.

Write tertiary (third-level) targets on the bulls-eye chart in the outer circle. Where possible, draw lines connecting tertiary targets to the specific secondary targets they influence.

We've gotten a good picture of who the influential players are for this issue, and who our target is. Knowing this helps us to choose who we want to direct campaign activities (which are often nonviolent direct action tactics) and demands towards. It's interesting to see how there can be several different targets for different stages or aspects of our campaign. You might have a secondary target as the focus of one nonviolent direct action, and the main target might be the focus of another aspect of the same campaign.

CHOOSING GOALS - BRAINSTORM

15 MINUTES

HANDOUTS

- **Campaign Goals**

GOALS

- **Practice developing concrete goals**

MATERIALS

- **Flip Chart**
- **Markers**

RUNNING THE EXERCISE

If the group is small (8 people or less), do this all together. If not, break into smaller groups and have each group record their own brainstorms, or divide the categories below amongst the groups.

Creating goals is the first step in creating a campaign. One of the major differences between a campaign and other types of work, is that campaigns are finite – they have a beginning, a middle, and an end. The end is when they have achieved their goals (or are clearly unable to achieve their goals).

Therefore, campaigns need specific goals. A non-specific goal would be "stop global warming." It's vague. It's too big to be a campaign goal.

Although it IS important to have a larger vision that guides the work that you do.

For our divestment work, our national campaign goals are:

1. Work with our allies to strengthen the youth climate movement
2. Convince colleges and universities to freeze new investments in the fossil fuel industry, and fully divest from these companies within five years
3. Increase public anger at the fossil fuel industry for causing the climate crisis and corrupting our democracy

We make these goals "SMART" at a campus level by building in measurable metrics and by setting timelines to reach them. In this exercise, you'll get a chance to practice creating specific goals for your own campus and set them to timelines. It's more a brainstorm than decision-making, but the higher quality of the campaign goal, the better.

Break participants into 3 groups: short term goals, mid term goals, and long term goal. Check for questions. If some people are not clear what campaign goals should be like, see if other participants can give examples.

What are the qualities of a good goal? A few major ones include:

Measurable, realistic, specific. (Feel free to illustrate from the SMART model campaign Goals handout - these ideas are also pasted below in this exercise - historical examples, or your own experience).

S - specific
M - measurable
A - activating
R - realistic
T - time-bound

Other elements include:

- Make the most difference in peoples' lives
- Attract a diverse crowd of supporters and allies
- Have been decided by the people who are most impacted by the problem
- Increase people's decision-making power or ability to control decisions (e.g. give students greater power over their own schools)
- Naturally lead people to see how society could be different (e.g., winning suggests a logical next step which people will want to take)
- Raise people's consciousness (i.e., help people see through the veil of lies of the current society)
- Build people's confidence and capability so that they can make future wins (e.g. choosing an easy goal that is quickly winnable so our group/movement can increase its morale, its size, and its awareness of its own power).

If you'd like or if you're short on time, you can time each brainstorm. It's a good exercise in quick decision making and saves time, but it can also be nice to spend a little more time if you have it.

(If you want): And just to add excitement, this will be done rapidly. You'll have XX minutes to come up with different specific campaign goals in each given area.

Optional: If you think it will help boost energy for this exercise, you can add a competitive element to it: "The team that comes up with the most specific campaign goals wins!"

When time's up, stop the brainstorms. Go around the room and get a report from each team. Allow a few minutes for discussion and reflection on the specifics – are the different answers specific? Are they realistic?

Repeat three or four more times. Allow a few minutes for the conversations as the teams begin to come up with more specific, realistic goals.

Lets select which goals feel right for our campaign and put them on our strategy timeline.

Draw a strategy timeline (using the model from earlier in the training) on the flip chart, and identify which short, mid, and long-term goals the group will use.

As the group is making the list, look for teachable moments to push the group on how they might use campaign goals. For example, notice if they are being reflective about either how they operated in the past or how they might operate in the future.

Quick decisions based on Resource Manual for a Living Revolution, by Virginia Cooper, et al (New Society Press, 1978), pgs. 59-61.
Information on Fossil Fuel Divestment goals: http://gofossilfree.org/faq

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STEP 3: SPECTRUM OF ALLIES

20 MINUTES

HANDOUTS

- **Spectrum of Allies**

GOALS

- **Understand how your tactics affect your ability to build a base**
- **Learn how to be an accountable ally**
- **Learn how to map unlikely alliances**

MATERIALS

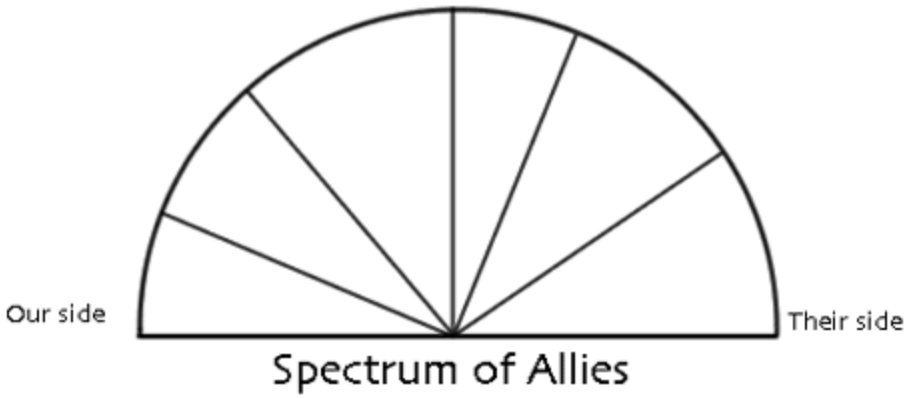
- **Flip Chart**
- **Markers**

RUNNING THE EXPERIENCE

Use the flip chart to describe the idea that in most social change situations there is a struggle between those who want the change and those who don't. Those who do are represented by a point at one side of the newsprint (say, on the left) and the opponents by a point at the other side.

Societies (or towns, or states) usually include a range of groups that can be put on a kind of spectrum from closest to the point of view of the advocates to farthest away.

Draw a horizontal line to represent that. Then draw a half-moon or half of a pie with wedges (as on the picture below, which can be used as a handout).



Activism is about using your power and voice to make change. Organizing is about that, too, but it's also about activating and empowering others. It helps to think in terms of groups. Successful movement-building hinges on being able to see a society in terms of specific blocs or networks, some of which are institutions (unions, churches, schools), others of which are less visible or cohesive, like youth subcultures or demographic groupings.

Analyzing your spectrum of allies can help you to identify and mobilize the networks around you. A spectrum-of-allies analysis can be used to map out a local campaign or to strategize for a whole social movement.

Here's how a spectrum-of-allies analysis works: in each wedge you can place different individuals (be specific: name them!), groups, or institutions. Moving from left to right, identify your active allies: people who agree with you and are fighting alongside you; your passive allies: folks who agree with you but aren't doing anything about it; neutrals: fence-sitters, the unengaged; passive opposition: people who disagree with you but aren't trying to stop you; and finally your active opposition.

Some activist groups only speak or work with those in the first wedge (active allies), building insular, self-referential, marginal subcultures that are incomprehensible to everyone else. Others behave as if everyone is in the last wedge (active opposition), playing out the "story of the righteous few," acting as if the whole world is against them. Yet movements win not by overpowering their active opposition, but by shifting the support out from under them.

Pause to make sure that's clear. Answer any questions, then offer the following historical example.

For example, in 1964, the Student Nonviolent Coordinating Committee (SNCC), a major driver of the civil rights movement in the U.S. South, conducted a “spectrum-of-allies style” analysis. They determined that they had a lot of passive allies who were students in the North: these students were sympathetic, but had no entry point into the movement. They didn’t need to be “educated” or convinced, they needed an invitation to enter.

To shift these allies from “passive” to “active,” SNCC sent buses north to bring folks down to participate in the struggle under the banner “Freedom Summer.” Students came in droves, and many were deeply radicalized in the process, witnessing lynching, violent police abuse, and angry white mobs, all simply as a result of black people trying to vote.

Many wrote letters home to their parents, who suddenly had a personal connection to the struggle. This triggered another shift: their families became *passive allies*, often bringing their workplaces and social networks with them. The students, meanwhile, went back to school in the fall and proceeded to organize their campuses. More shifts. The result: a profound transformation of the political landscape of the U.S. This cascading shift of support, it’s important to emphasize, wasn’t spontaneous; it was part of a deliberate movement strategy that, to this day, carries profound lessons for other movements.

Re-draw a blank spectrum and ask participants to fill in individuals and groups on their campus. Once you have the beginnings of a map of the campus allies, pause and tell the group they should continue to fill this chart out in a future strategy meeting.

Sometimes polarization happens, and the wedges closest to the opponent move away from you and toward the opponent. You can still win, if enough of society (or your campus) takes a step in your direction. Some confrontational tactics may alienate a few potential supporters, but this is usually a worthwhile trade-off to mobilize active support and mount pressure on your target.

Let it sink in that activists often have the mistaken idea that they need to win everyone (inviting despair), or that their whole attention needs to be on the powerholders (again inviting despair).

Pass out the handout and invite everyone to read it.

This tool comes from Martin Oppenheimer and George Lakey, A Manual for Direct Action, Quadrangle Books, 1965. Training for Change: http://www.trainingforchange.org/spectrum_of_allies

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ORGANIZING

TOTAL TIME = 2 hours

GOALS

- **Build literacy around different models of leadership**
- **Build fluency in different roles for social change**
- **Identify best practices for Recruitment and Retention, facilitating good meetings, and building an inclusive internal culture**

HOW TO PREPARE

- **Set up the room and arrange the chairs in a circle**
- **On large sheets of newsprint, write up:**
  - **Agenda and workshop goals**
- **Photocopy the handouts:**
  - **4 Roles Relating To Change**
  - **Three Tips for plugging people in**
  - **Facilitator Never Evers**
  - **Games, Warm Ups, and Energizers**
  - **How to make meetings work in a culturally diverse groups**
  - **Difficult Participant Behavior**
- **Materials needed:**
  - **Tornado write ups**
  - **Flip Chart**
  - **Markers**
- **Prep with your co-facilitator. Get to know each other's training style and strengths**
- **Check in with the organizer of the training to find out more about the groups experience level, the makeup of the group, and to confirm logistical arrangements.**

SECTION OVERVIEW

TIME	EXERCISE	GOAL	DESCRIPTION
15 minutes	Leadership; everyone has a role to play	Understand and value many forms of leadership	Presentation
30 minutes	Tornado Warning!	Learn the 4 roles of an organizer	Interactive activity
20 minutes	Min/max: Recruitment & retention	Lift up best and worst practices for recruitment and retention	T chart
20 minutes	Min/max: Group dynamics & meeting facilitation	Lift up best and worst practices for meeting facilitation and group dynamics	Roleplay & T chart

20 minutes	**Power and privilege in our group meetings**	**Left up best and worst practices for negotiating power and privilege in group meetings**	**T chart**
15 minutes	**One-on-ones**	**Learn the art of the one-on-one**	**Roleplay**

LEADERSHIP: EVERYONE HAS A ROLE TO PLAY

15 MINUTES

HANDOUTS

- **None**

GOALS

- **Identify leadership models that do and do not motivate groups**
- **Understand that leadership is not a title, but an ongoing series of actions**

MATERIALS

- **Butcher Paper**
- **Markers**
- **Tape**

RUNNING THE EXERCISE

Before you begin the exercise, write the following quote on butcher paper: "Leadership is taking the responsibility for enabling others to achieve common purpose in the face of uncertainty."

Draw the following diagrams on butcher paper and post on the wall:

There are endless roles to play in organizing, and the people in this room represent all different kinds of skills and passions. What every campaign needs and is built on is leadership. But what does it mean to be a leader?

Can anyone throw out some quick definitions of leadership that you've heard before?

I like to think of leadership as a behavior, not as a job title, which means that the way you behave as a leader matters a lot more than what you call yourself. Let's look at a few models of leadership behavior.

(Bring out 1st diagram) Has anyone ever been in a group where one person took on all the responsibility for the group, maybe just delegating tasks to the other members?

How did that work for the "leader"? Were you stressed out? Did you get sick? Were you able to maintain that level of responsibility for long?

How did that work for the rest of the group? Were you able to maintain the amount of work you wanted to? Did you feel ownership of the work you did? What kinds of challenges might arise from that kind of leadership model?

(Bring out the 2nd diagram) Has anyone ever been in a group where there was no clear leadership, where everyone independently did whatever they thought was best at the time?

How did that work for you? Did you feel like you knew what others were doing? Did you duplicate efforts on projects? Were you frustrated? What other challenges might arise from this model?

Sometimes these first two leadership models work for specific groups, but they often leave their groups with unresolved issues around hierarchy or accountability.

One definition of leadership is from the New Organizing Institute: "Leadership is taking the responsibility for enabling others to achieve common purpose in the face of uncertainty." That's really what organizing is all about.

(Bring out 3rd diagram)
In the leadership team model, we see responsibility shared between many people who are linked together by commitments and accountability.

What's different in this model of organizing? What makes a leadership team more resistant to problems like the leader burning out or the lack of accountability that we saw in the last 2 models? Has anyone worked in a model like this before?

When we organize, we're building our work on a structure of relationships, commitments, and trust that everyone will do what they say they will. When we behave like leaders, this means that we're modelling that for everyone we're working with -- we're building a culture of accountability.

What other cultures make leadership teams work most effectively? Setting and repeating clear expectations? Consistent communication? (pull more examples from the group)

Let's bring this back to the definition we gave of leadership: "Leadership is taking the responsibility for enabling others to achieve common purpose in the face of uncertainty."
How does the leadership team reflect this definition?

- Taking responsibility
- Enabling others
- Common purpose (clearly identified)

TORNADO WARNING: FOUR ROLES

30 MINUTES
HANDOUTS

- **Four Roles Relating to Change**

GOALS

- **Learn about the four roles of social change activists**
- **Appreciate the different roles while also contextualizing the remainder of the workshop**

MATERIALS

- **4 pieces of paper: "Rebel" "Advocate" "Organizer" and "Helper"**

RUNNING THE EXERCISE

I'm going to read a scenario. While you're hearing this scenario, think about the kind of response you'd make. Where are you immediately drawn in this situation?

The scenario:
In a Midwestern city in the US, a major storm, super-charged by climate change, hits and knocks down several buildings that include low-income housing. Almost forty people are still unaccounted for, and might be trapped in the rubble. The city's response is terribly inadequate – both in terms of preparation for a disaster like this, and in terms of execution of its flawed plan. State and federal offices have the resources to respond, but are not adequately mobilized.. The bungled relief effort highlights a number of broader issues about how the government at all levels responds, especially to working poor Midwesterners. How do you change this dreadful situation? Take a quick moment to think what you would do if you lived in that city.

Now, I'm going to read four possible actions, and point to places in the room. If you are immediately drawn to this particular action, move over to that spot. First listen to them all, then think about which reaction you are most likely to take.

Possible actions:
1. People could be dying under the rubble and need help immediately. We should go to the park right now and try to help the rescue efforts. Even if we can't help them, there are probably children who need care and could use our help.

2. We need to get on city hall's case right away, and see what is keeping the authorities from doing their jobs. We know they could get the state and the feds in here right away. There are systems in the city and we need to make sure everyone has tried all the options.

3. We need to get people together to plan an action about all the needs that aren't getting met. What can the churches do? What can the Rotarians and the Chamber of Commerce do? We should bring together the people who are suffering and allies together to put pressure on government to change the situation.

4. We can't let the government abuse people like this! Where's the governor and mayor? We need to raise our voices so they and the public can hear our outrage! Let's go camp on the state capitol grounds until he asks for a disaster declaration and gets the disaster relief funds flowing. We'll dramatize the loss of homes by setting up tents right where he has to look at them every day!

Assign each of the four roles to a corner in the room. Have people move there based on their immediate response to this situation. It may not always be an exact match, but tell people to pick which role best describes their impulse. If there are not enough people to fill a role, ask if a few people at least have an inkling in that direction, and could move over to that corner.

With people grouped by the four roles, explain that these responses are typical of four different roles that social activists often play: helpers, organizers, advocates, and rebels. Write these words up on the newsprint, but don't tell them which corner is intended to represent which role. Instead, ask them the following questions, one at a time. Allow two or three minutes for the groups to discuss their answers. Then ask them to share those succinctly in the

large group.

Which of these four words do you think best describes your own group? Why are you in this spot? Would you be in this same spot if the scenario were different? How is this particular role critical in making social change happen?

What is a strength from this role? How is it effective?

From your position, what annoys you or concerns you when working with someone from one of the other positions? What would you say to the other roles about working with you?

If, after the first question ("associate your position with one of the four words on the newsprint"), two groups choose the same word to describe themselves, explore the differences. Re-read the response they selected to the tornado scenario, if necessary. Explore the differences. Pass out the handout, if you think it would clarify the roles.

You might mention that the first option is consistent with Helper role, second option with the Advocate role, third with Organizer, and fourth with Rebel.

Give the groups an especially long time to discuss the second cluster of questions.

Participants may change position if they discover they are in the wrong group for them.

After discussing all the questions in small groups, and reporting back after each discussion, bring everyone back together.

Pass out the handout "Four Roles Relating to Change" and talk about it in the large group. It can be useful to have each corner read out loud the ways their role can sometimes be "effective" and "ineffective."

For this workshop, we'll be developing skills in the Organizing role. Each role is important and valuable. But for the purposes of this workshop, we'll be focusing on one.

This tool was written by Daniel Hunter with Betsy Raasch-Gilman, Training for Change (www.TrainingForChange.org). Adapted by 350.org. Four Roles of Social Change adapted by George Lakey from Bill Moyer's Movement Action Plan (see his book Doing Democracy).

HELPER		***ADVOCATE***	
INEFFECTIVE	***EFFECTIVE***	***INEFFECTIVE***	***EFFECTIVE***
Believes charity can handle social problems, or that helping individuals can change social structures	***Assists people in ways that affirm their dignity and respect***	***"Realistic politics": promotes minor reforms acceptable to power- holders***	***Uses mainstream institutions like courts, city hall and legislatures to get new goals and values adopted***
Focuses on casualties and refuses to see who benefits from victimization	***Shares skills and brings clients into decision-making roles***	***Promotes domination by professional advocacy groups that are top- down, patriarchal and are more concerned about organization's status than the goal of their social movement. (Such agencies can undermine***	***Uses lobbying, lawsuits, elite networking/ coalition building for clearly-stated demands, often backed by research***
Provides services like job training which simply give some people a competitive	***Educates about the larger social system***		***Monitors successes to***
	Encourages experiments in service delivery which support		

edge over other people, without challenging the scarcity which gives rise to competition	*liberation*	*democracy in movements and disempower the grassroots.)* *Identifies more with power-holders than with grassroots* *Does not like paradigm shifts*	*make sure they are implemented*

REBEL		*ORGANIZER*	
INEFFECTIVE	*EFFECTIVE*	*EFFECTIVE*	*INEFFECTIVE*
Promotes anti-American, anti-authority, anti-organization rules and structure	*Protests: says "no!" to violations of positive American values*	*Believes in people power: builds mass-based grassroots groups and networks*	*Has tunnel vision: advocates single approach while opposing those doing all others*
Identifies as a lonely voice on society's fringe; attached to that identity	*Employs nonviolent direct action and attitude, including civil disobedience*	*Nurtures growth of natural leaders*	*Promotes patriarchal leadership styles*
Promotes change by "any means necessary" – uses tactics without realistic strategy	*Targets power-holders and institutions*	*Chooses strategies for long-term movement development rather than focusing only on immediate demands*	*Promotes only minor reform*
Has victim attitude and behavior: angry, judgmental, dogmatic	*Puts problems and policies in public spotlight*	*Uses training to build skills, democratize decisions, diversify and broaden organizations and coalitions*	*Stifles emergence of diversity and ignores needs of activists*
Uses rhetoric of self righteousness, absolute truth, moral superiority	*Uses strategy as well as tactics*	*Promotes alternatives and paradigm shifts*	*Promotes visions of perfection cut off from practical political and social struggle*
Can be strident: personal upset more important than movement's needs	*Does work that is courageous, exciting, risky*		
	Shows in behavior the moral superiority of movement values		

Handout by George Lakey (Training for Change) with thanks to movement strategist Bill Moyer.

MINIMIZE / MAXIMIZE: RECRUITMENT AND RETENTION

20 MINUTES
HANDOUTS: None

GOALS

- **Learn best practices for recruitment and retention**

MATERIALS

- **Flip chart**
- **Markers**

RUNNING THE EXERCISE

Draw a T chart on a piece of flip chart. One side labeled “Maximize”, and one side labeled “Minimize.”

Imagine we just had a public event, and are now in our first group meeting after the event. Two new people show up to your meeting and they don’t know anyone else in the room. What are all the things we can do maximize their ability to feel welcome, plug in, take on tasks, and want to come back?

Make sure that people list specific behaviors that they could do in a meeting. For example, “Be friendly” is not specific. Ask “What are some specific things you could do to be friendly?” Introducing everyone, making an effort to have a one-on-one with each person after and invite them to lunch are good examples of behaviors that communicate friendliness.

Harvest the list of ideas. Usually, the group can be pretty thorough. If they are drawing blanks, some good ones include:

Maximize:

- Have a buddy-system: a group member invites a new person to lunch and has a one-on-one to get to know them, their interests, skills, and capacity
- Have a list of next steps, be clear with it, and offer tasks to people
- Have food
- Debrief previous events, go over the plan for future events
- Explain the strategy and theory of change
- Play games and have energizers
- Get their emails and add them to your list
- Speak about your plans with vision
- Invite new people into positions of leadership by letting them “own” the tasks they take on

Minimize:

- Use Jargon
- Don’t start and end on time
- Don’t introduce names in the beginning
- Use “insider” points of reference and terms
- Poor facilitation

You may want to pick a couple of these and dig-in: discuss them further, ask the group ways they will institutionalize this behavior and make it part of the culture of the group.

MINIMIZE / MAXIMIZE: MEETING FACILITATION

20 MINUTES

HANDOUTS

- **101 Games, Energizers, and Ice Breakers**
- **Facilitator Never-Evers**

GOALS

- **Learn best practices for recruitment and retention**

MATERIALS

- **Flip chart**
- **Markers**

RUNNING THE EXERCISE

I want you to take a minute to imagine the worst meeting you've ever been to. Close your eyes. Think back to it. What did it feel like? Who was talking? Who was not talking? How long did it last? What was it like to leave the meeting?

Speak slowly and give periods of silence for participants to put them in this mindset.

Ask the group to share a couple ways that they felt - capture on flipchart the FEELINGS and SENTIMENTS.

Let's do a little roleplay. Can I get 4 volunteers to act out the "worst meeting ever"?

Give the group 3 minutes to plan their roleplay. The rest of the group can take a short break. Then have them roleplay the meeting in front of the whole group for 5 minutes.

Encourage space for laughter. Affirm "wow who else has been in a meeting like that?!" This is a moment to build group unity and use humor to reflect on common mistakes.

Draw a T chart on a piece of flip chart. One side labeled "Maximize", and one side labeled "Minimize."

What are the things that the group did in the roleplay that minimized the ability to have a functional meeting?

HIghlight the bad practices, and then ask "what's the flipside of this behavior? What are the things we can do to maximize functional meetings?

Notice if issues of power and privilege come up in the group: for example - all the men talk and dominate space, and women do not talk. People of color feel culturally isolated or are asked to speak on behalf of an entire group. Note these moments so we can dive into them in the following section.

Harvest the list of ideas. Usually, the group ca n be pretty thorough. If they are drawing blanks, some good ones include:

Maximize:

- Start and end on time
- Have an agenda beforehand
- Rotate facilitation
- Take notes
- When appropriate, use a “stack”
- Explain terms
- Debrief previous events
- Invite people to take on new roles
- Have food
- Work happens outside the meeting, and is reported back within the meeting

Minimize:

- Poor or inconsistent scheduling
- One person always facilitates, or nobody facilitates at all
- Work happens within the meeting but not in between meetings
- Lack of energizers, moving bodies, or games
- Lack of next steps or clear plans
- Dominating behavior. Silencing behavior

You may want to pick a coupl e of these and dig-in: discuss them further, ask the group ways they will institutionalize this behavior and make it part of the culture of the group.

MINIMIZE / MAXIMIZE: POWER AND PRIVILEGE IN MEETINGS

20 MINUTES

HANDOUTS

- **How to make meetings work in a culturally diverse groups**

GOALS

- **Learn best practices for building an inclusive meeting culture**

MATERIALS

- **Flip Chart**
- **Markers**

RUNNING THE EXERCISE

We’ve talked about and identified ways that the racism, sexism, ableism, homophobia, or ageism in our society can influence our behavior without us realizing it. We all want to be inclusive, but sometimes in our meetings men talk more than women, people make offensive statements without realizing it, members can feel tokenized or culturally alienated. Since we all want our group to be as empowering and inclusive as possible, lets talk about behaviors that we can institutionalize in our group to make this the case.

Draw a T chart on a piece of flip chart. One side labeled “Inclusive”, and one side labeled “exclusive.”

What are different behaviors in our group that we can use to make our meeting culture more inclusive or more exclusive?

Like the above activities, make sure that people list specific behaviors that they could do in a meeting. Pay attention to well-meaning but possibly offensive suggestions. Do not just write up all suggestions - feel free to challenge some to reveal unexamined assumptions. For example, if its a mostly-white group, someone might say "outreach to the black students." You might ask "what do you mean by 'outreach'?" and use this as an example to point out that white activists often set the terms and strategy of their work, and then "outreach" for others to join. Another model is for the group to humbly approach student cultural organizations to go to their events, learn from their perspectives, and invite them to co-sponsor events and share leadership in developing strategy.

Harvest the list of ideas. Usually, the group can be pretty thorough. If they are drawing blanks, some good ones include:

Maximize:

- Use "Progressive Stack" where people who haven't spoken, or women, or people of color, etc, get bumped ahead in their turn to speak
- Affirm agreements like "step up, step back" or "define terms" or "assume good intentions"
- Use a system that empowers people who are in the numerical minority of a group to voice feelings of hurt or offensive language without feeling like they are "bringing down the vibe" - such as using "ouch" if someone makes a thoughtlessly offensive statement
- Affirm the good intentions of everyone in the group
- Make space to explicitly talk about power and privilege so the responsibility is not just on the shoulders of those who might be disempowered
- Rotate facilitation
- Use good strategy process that examines ways to expand allies in the campaign
- Offer childcare in the meeting if relevant
- Use small groups and pair-shares frequently
- Use a buddy system, or small ongoing support groups or caucuses
- Follow up after the meeting with group members who experience frustration during the meeting

Minimize:

- Use jargon
- Only do events that are culturally specific (for example, a punk rock show fundraiser)
- "Free for all" style of participation
- Make lists of tasks and invite people to step up to take them, rather than making assumptions about it
- Have the groups spokespeople be only white men, without realizing it

You may want to pick a couple of these and dig-in: discuss them further, ask the group ways they will institutionalize this behavior and make it part of the culture of the group.

ONE ON ONES: BUILDING BLOCK OF ORGANIZING

15 MINUTES

HANDOUTS

- **Tips for Plugging People In**

GOALS

- **Learn how to do a one on one and build it into your organizing practice**

MATERIALS

- **Flip chart**
- **Markers**

RUNNING THE EXERCISE

At it's root, organizing is about personal relationships. The building block of all organizing is our ability to connect with others and compel them to change. While "activists" raise their voice and use their power to make change, "organizers" help empower many others' to make change. The one-on-one is a tool to get to know people and what makes them tick. It's literally getting lunch, tea, or just hanging out with a prospective group member and having an intentional conversation.

What kinds of things would we want to know about a prospective group member?

Scribe ideas. They may include:

- The person's interests
- The person's skills or abilities
- The amount of time a person has to commit
- A person's motivation for getting involved
- Ways to affirm that person and give them a sense of social belonging

When someone says they're interested in finding out more or getting involved in your group, don't just invite them to come to your next meeting. Even the most welcoming and inclusive groups tend to develop their own meeting culture that can unintentionally make new folks feel like outsiders. To increase your new member *retention* rates, schedule one-on-one intake interviews with new folks *before* they come to a group meeting. Get to know the person. Find out about what attracted them to the group, what kinds of tasks they enjoy or are good at, and how much time they have. Then tell them more about the group and discuss with them what their involvement could look like. You can use and adapt the questions on side two of this sheet. While this level of orientation requires more time in the short-term, it saves time in the long-term; people tend to plug into the work faster and stick around longer. It may make sense for one or two mem- bers of your group to take on orienting new folks as an ongoing role.

Accommodate multiple levels of participation.

In short, some people can give a lot of time, and some can give a little. Organizers with more time on their hands should avoid projecting this as an expectation onto others. A foolproof way to drive new folks away from your group is to consistently ask them to give more time than they are able. Instead learn what kind of time commitment is realistic and sustainable for them. Help them plug into tasks and roles that suit their availability. Check in with them about how it's going. Are they feeling overextended, or would they like to take on more? Take responsibility for helping new folks avoid over-commitment and burnout.

Make people feel valued and appreciated.

If you want to inspire people to stick with your group for the long haul, you'll need to make them feel valued and appreciated. It's basic. People like to be around people who respect them, and who are nice! If social movement groups want to compete with the myriad of often more appealing options for people's free time, then we have to

treat each other well and take care of each other. Notice and acknowledge new folks' contributions, however small. Make time to check in with them outside of meetings. Ask their opinions often:What did they think about the meeting? the event? the action? Bounce your ideas off of them and ask for their feedback.

Invite a participant to come up and role-play a one-on-one with you, so you can demonstrate best practices with the group. Ask the group to reflect on what they saw you do.

Split the group into pairs and give them five minutes to practice their own one-on-ones with each other. If you have time, you can invite one group to demonstrate in front of the whole room.

Hand out "Tips for Plugging People In" and interview sheet.

ENDOWMENTS 101

This training is meant to serve as a primer for learning about university endowments. In this training we cover basic structure of university finance, an in depth analysis of asset classes, visioning about where we would like university finance to go, and closing on strategies for achieving that vision with an emphasis on reinvestment.

TOTAL TIME = 1.5 hours

SECTION GOALS

- **Understand the structure of the endowment**
- **Be able to differentiate asset classes and understand what is relevant to this campaign**
- **Identify reinvestment strategies for universities after divestment**

HOW TO PREPARE

- **Set up the room and arrange the chairs in a circle**
- **Materials needed:**
  - **Flip chart**
  - **Markers**
- **On large sheets of newsprint, write up:**
  - **Agenda and workshop goals**
  - **Charts and figures (your school's money, asset allocations)**
  - **"Comfortable/Not Comfortable" Pieces of paper**
- **Prep with your co-facilitator. Get to know each other's training style and strengths**
- **Check in with the organizer of the training to find out more about the group's experience level, the makeup of the group, and to confirm logistical arrangements.**

OVERVIEW

TIME	EXERCISE	GOAL	DESCRIPTION
5 minutes	Introduction	Introduce the training	short statement
10 minutes	Your School's Money	Differentiate between operating account and endowment	Explanation of school's financial structure
30 minutes	Asset Allocations	Understand Endowment Breakdown	Pie Chart exercise
10 minutes	Visioning	Brainstorm alternatives	Brainstorm
10 minutes	Reinvestment as a Strategy	Understand existing alternatives	Explanation of reinvestment
15 minutes	Debrief and Recap	Synthesize	Spectrogram exercise, Seek feedback

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INTRODUCTION

5 MINUTES
HANDOUTS: None

GOALS: Introduce the training and highlight that while information alone won't win a campaign it will help you feel confident in going toe to toe with administrators.

MATERIALS: None

RUNNING THE EXERCISE:

It is important to set the tone in this training that while understanding endowments is valuable it doesn't mean much unless you develop an organizing plan to go with it. Being well informed about university endowments will not win a campaign alone, but can be helpful in going toe to toe with administrators, creating campaign goals, and convincing potential allies of your arguments.

YOUR SCHOOL'S MONEY

10 MINUTES
HANDOUTS: None

GOALS

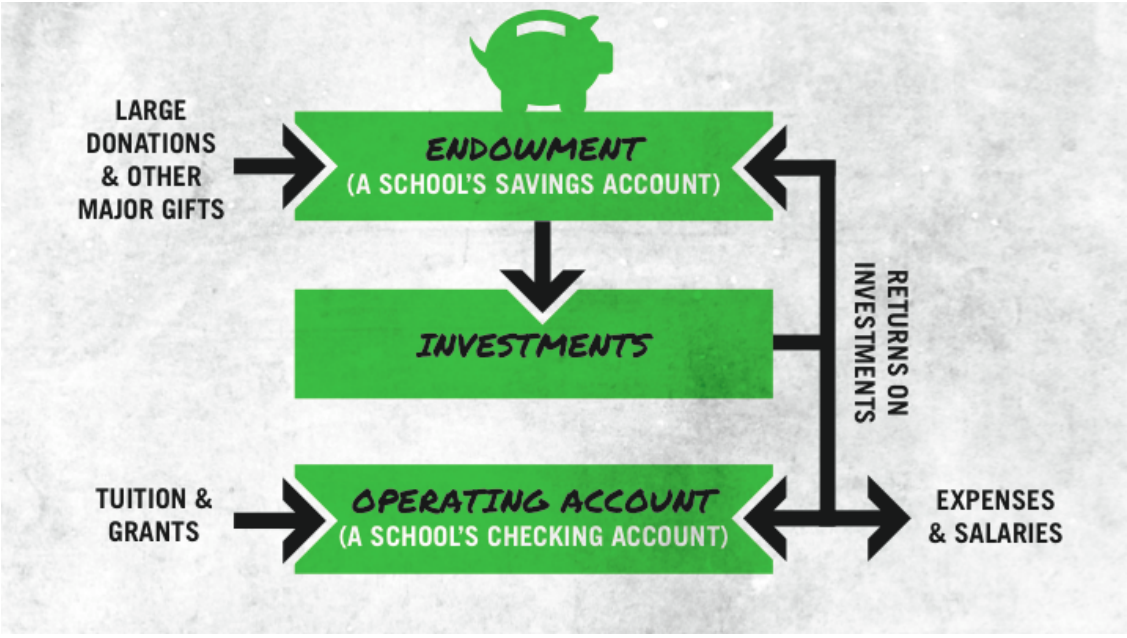
- **Understand the differences between and operating account and an endowment.**

MATERIALS:

- **Flip chart**
- **Markers**

RUNNING THE EXERCISE:

Draw this image on the flipchart:



First, it's important for everyone to feel comfortable about talking about money, especially large amounts. Many people don't. Raise your hand if you have a savings account? How about a checking account?

> ***Trainer's Note:*** ***these questions are designed to make your audience feel more comfortable--please think about your audience, and assumptions about class, before using these questions.***

Great, your university endowment and operating budget operate in a similar way, but on a much grander scale.

Your endowment serves as permanent savings account or nest egg for your university. The purpose of this money is to ensure the university can exist forever. This money is not meant to be touched very much, but rather the school spends a small portion of it (about 5%) each year. The endowment is instead used to make investments that will generate high returns (aka more money) that will both continue to grow the endowment and support the operating budget to a small extent. Typically only a portion of the interest made on the endowment will be moved into the operating account (aka spent). In difficult years the endowment may be spent slightly more to make sure salaries are paid and buildings maintained, but it is not legal for large chunks of the endowment to be spent.

The operating budget acts as a university's checking account. Tuition and grants are funneled into the the operating account. The account is then used to pay university expenses and salaries.

> ***Trainer's Note:*** ***Often times the endowment is treated as untouchable far removed from the daily operations of the university that no one talks about it like when developing a climate action plan. Some universities may have policies that claim they do not make investment decisions for "political reasons". Arguments like that are used to stall student progress and make it more difficult for them. Remember, policies can change and be interpreted in different ways.***

Make space for questions.

ASSET ALLOCATION

30 MINUTES
HANDOUTS: None

GOALS: Understand different asset allocations and their role in a divestment or reinvestment campaign.

MATERIALS:

- **Flip chart**
- **Markers**

RUNNING THE EXERCISE:

Now that we know the basic structure of university finance we are going to delve into the composition of the endowment, partly so we understand how much of the endowment is in fossil fuels.

> ***Trainer's Note:*** ***Divestment is the process of selling assets, it is a strategy that has been used by a number of social movements to create change.***

Do a quick brainstorm.

What are some investment types that you know of?

Possible answers:

- *Cash*
- *Bonds*
- *Stocks*
- *Private Equity*
- *Venture Capital*
- *Mutual Funds*
- *Hedge funds*
- *Real Assets*

Have pie chart diagram already drawn:

The Pie Chart is oriented clockwise beginning with cash to move from asset class to asset class in order of: (1) Low Risk to High Risk and (2) Low Return to High Return.

Trainer's Note: It is helpful to draw the pie chart on a flip chart and fill in each asset class as you go:

|----Cash-----Bonds----Stocks---Venture Capital---Private Equity---Real Assets----Hedge Funds|

Explain the pie chart.

<u>Assets</u>

- Cash: Is what it sounds like: easy to access money that can be used in case of emergency and is housed in a bank. Often the cash portion is kept in a big bank like Bank of America, and one alternative.

- Bonds: Also referred to sometimes as "fixed income" are loans with a set rate of return or interest rate that are held for a set period of time. Bonds are typically from companies or governments.

- Stocks: Stocks are shares in a publicly traded company, by owning stocks you own a piece of a company. There are low risk and higher risk stocks with a low return and high return options, but generally are a pretty safe investment. In addition to generating returns, once a person or institution holds $2000 in stock they are allowed to vote on proxy voting ballots and submit resolutions to change company policy.

- Mutual Funds (stocks or bonds)
  These are a type of commingled fund in which stocks or bonds are bundled together and managed by a fund manager. Often times money from multiple parties is pooled together which allows for the purchasing of great amounts of stock and a wider diversity of investment. This helps save on costs for the investors

- Private Equity
  This broad category includes things like venture capital, but fundamentally is investment in privately traded companies. An example of a private equity firm is Bain Capital. Private equity firms concern themselves with how to make private companies as profitable as possible. This means that they will purchase private companies and do things like outsource jobs and bust unions to decrease costs associated with labor, raw materials, etc. Private equity can be very risky but also turn a high profit. Not all private equity is bad (more in the next section)

- Venture Capital
  A type of private equity (we will talk about PE later). Specifically, it is when you directly invest in a start up business and can pose a significant amount of risk as well as a substantial reward. These do not tend to comprise a large portion of an endowment portfolio.

- Real Estate and Real Assets
  This is a tangible asset class where a university might own a mine or forest (or a portion of one!) and benefit from either the resource being cultivated/ extracted or the increasing value of the property itself. This type of asset class will not play a role in divestment, generally.

- Hedge Funds

Another type of commingled fund only open to very wealthy or institutional investors. Hedge funds employ a wide range of investment strategies to achieve very high returns. These investments were not widely deployed until the 1990s and universities were early investors in them. Because these funds had a very select clientele and were quite new they have very little regulation until 2008 when it became clear that these risky investment approaches taken by hedge fund managers played a large role in the economic crisis. Hedge funds often use computerized investment approaches that change rapidly so it is difficult to get an accurate read of what you own on a day to day or week to week basis. Additionally, very little engagement has been done concerning hedge funds so we are still working on finding ways to regulate them and hold them accountable. Hedge funds can be very risky.

The REC Student Handbook is a great resource to share with your team. It includes definitions of these asset classes. You can download it for free at http://www.endowmentethics.org.

VISIONING

10 MINUTES
HANDOUTS: None

GOALS:To get students thinking about what their endowment could look like.

MATERIALS:

- **Flip chart**
- **Markers**

RUNNING THE EXERCISE:

 We have just taken in a massive amount of information, both about existing asset allocations and alternative investment options. It is on the latter that we should focus.

 Have participants take a minute and write down their vision for the types of things they would like their university to be investing in.

Every person should share one thing that was part of their vision. Draw responses on a blank sheet of flipchart paper to “create” the vision we are trying to achieve.

REINVESTMENT AS A STRATEGY

10 MINUTES
HANDOUTS: None

GOALS:To pair the vision from the previous exercise with real tools for making change.

MATERIALS:

- **Flip chart**
- **Markers**

RUNNING THE EXERCISE:

 Reinvestment, is the act of reallocating some of the divested money, or investment money from the college

into sustainable alternatives. It's important for creating a lasting change and changing the conversation at universities when it comes to responsibly managing their money. Supporting renewables, energy efficiency, and sustainable communities also undermines the fossil fuel industry.

But wait, is this possible? Are there financially sound options?


Write the bolded terms on the flip chart, explaining the terms as you go.

- Proactive investment- Stipulate that a portion of the divested money is reinvested in renewable energy energy efficiency and other investments that will help to mitigate climate change.
- Moving money from banks that finance dirty energy into community development financial institutions.
- Work with your mutual fund managers to develop positive mutual fund options for your university.
- Investing in solar and wind venture capital.
- Moving money into different asset classes like real assets that support sustainable forestry or wetland

<u>Assets</u>

- Cash: You can instead investment your money a CDFI (Community Development Financial Institution) or Credit Union focused on supporting low-income people and sustainable communities. Usually make up 3% of an endowment.

- Bonds: Seek out community bonds or funds that will give you the same returns, but support low- income housing, micro- enterprise, and other community resources. You can also buy bond funds that buy bonds from renewable energy developments.

- Stocks: Once a person or institution holds $2000 in stock they are allowed to vote on proxy voting ballots and submit resolutions to change company policy--this is useful for changing company policy, not shifting the company overall. Colleges can also buy shares in companies with strong reputations of sustainability and good labor practices--particularly clean energy and renewable energy and try to work with companies to make the companies they do invest in better.

- Mutual Funds: You can buy mutual funds that engage with companies on your behalf and specifically try to target investments in sustainable companies. You can also engage with your managers to change their process

- Private Equity: There are great options in this category for responsible investing and investing in sustainability. Many smaller private equity firms invest in alternative energy companies, water infrastructure companies (i.e. they make it more available to people, not own it), and help companies to become more sustainable. Some funds even use this structure to directly invest in energy efficiency like replacing light bulbs on in cities.

- Venture Capital: Colleges can invest with managers who are buying part of sustainable companies like renewable energy start ups, or clean tech startups.

- Real Estate and Real Assets: Colleges won't be divesting from this class, but they can find great opportunities to invest in things we support. Yale owns over $1billion in sustainably managed forests and wind farms. Colleges can also invest in sustainable real estate that supports low-income communities and is **shifting towards renewable energy and is energy efficient.**

- **Hedge Funds: This is the most difficult place to find sustainable investments. There are a small number of hedge funds that focus on clean and renewable investments. Hedge funds can still outperform other forms of investments because they are allowed to borrow money, and can still bet against (that it will go down)**

all or part of the market, even if they are investing primarily in sustainable companies.

DEBRIEF AND RECAP

15 MINUTES
HANDOUTS: None

GOALS: Synthesize participant learning.

MATERIALS:

- **Flip chart**
- **"Very comfortable", "somewhat comfortable", and "not comfortable" pieces of paper**
- **Markers**

RUNNING THE EXERCISE:

Set up a "spectrogram." Have participants stand up, and place a piece of paper that says"very comfortable" on one side of the room, "somewhat comfortable" in the middle, and "not comfortable" on the other side. Tell people that you will ask a question and they should stand near the paper that describes how they feel the best.

How comfortable do you now feel in talking about and understanding your university's investments?

Ask two people from the "very comfortable" "somewhat comfortable" and "not comfortable" parts of the thermometer to share their rationale.

Afterwards, have participants turn to a partner and share their most important takeaway from this training.

Do a report back from 3-5 students.

This section comes from Rose Espinola, Dan Apfel, and Lauren Ressler of Responsible Endowments Coalition.

WORKING WITH NEW AND TRADITIONAL MEDIA

TOTAL TIME = 2 hours

This workshop is intended for a team that will be working directly with media, and may not be necessary for a larger group. For larger groups that will not be working with media, the sections on, "Why Media Matters," and, "What Makes a Good Story," should suffice.

WORKSHOP GOALS

- **To build the skills of a team in working with and pitching stories to reporters, interviewing well, and planning a media strategy.**
- **To offer examples of media materials in the toolbox.**

HOW TO PREPARE

- **Set up the room and arrange the chairs in a circle**
- **On large sheets of newsprint, write up:**
  - **Agenda and workshop goals**
- **Photocopy the handouts:**
  - **Your Media Plan and Toolbox**
- **Materials needed:**
  - **One piece of paper labeled A and one piece labeled B**
  - **Flip chart**
  - **Markers**
- **Prep with your co-facilitator. Get to know each other's training style and strengths**
- **Check in with the organizer of the training to find out more about the groups experience level, the makeup of the group, and to confirm logistical arrangements.**

OVERVIEW

TIME	EXERCISE	GOAL	DESCRIPTION
20 minutes	Spectrogram	To gauge the familiarity of the group with media work.	A kinesthetic and visual representation tool to gauge experience.
15 minutes	Why Media Matters	To bring out the knowledge already in the room and build buy in on the importance of media.	Facilitated discussion of the basics of media + why it's important.
10 minutes	What Makes a Good Story?	To build media strategy/pitching skills.	
5 minutes	Working with Reporters	To learn best practices as a group.	
5 minutes	Tips for Pitching Your Story	"	
10 minutes	Interviewing Basics	"	

40 minutes	**Team Work: Interviews and Pivoting**	**To practice the skills covered in the rest of the training, and to build good media habits by workshopping them.**	**Practice developing talking points, pitching stories and pivoting.**

SPECTROGRAM

20 MINUTES

HANDOUTS

- **None**

GOALS

- **To gauge the familiarity of the group with media work.**
- **To get people up and moving!**

MATERIALS

- **One piece of paper labeled A and one piece labeled B**

RUNNING THE EXERCISE

Ask participants to stand up and clear space in the middle of the room. Put the piece of paper labeled A on one side of the room, and B on the other side of the room.

There is likely a wide range of experiences dealing with media in the room. To help us see the different experiences of folks in this room, I'd like you to put your body somewhere on the spectrum from side A of the room to side B, where A is "I am totally comfortable and experienced working with media," and B is, "I have never worked with media before."

Get some sample stories from folks along the spectrum.

Repeat this exercise with spectrums on whether you felt an interview went well, and whether articles or media were flattering to your cause.

WHY MEDIA MATTERS

15 MINUTES

HANDOUTS

- **None**

GOALS

- **To bring out the knowledge already in the room and build buy in on the importance of media.**

MATERIALS

- **Flip chart**

- **Markers**

RUNNING THE EXERCISE

Why should we engage with media?

Pull out answers from the group, which may include:

- *Put pressure on your targets*
- *Generate Buzz/Hype around your campaign*
- *Educates the general public on our work, puts a local story to climate change*
- *Spread the word & recruit volunteers to your cause*
- *It can be a great energy boost to group members*
- *Advance your campaign*
- *Hold officials accountable (positive or negative accountability)*

On the flip chart, write out:

1. *Define your goals*
2. *Define your audience*
3. *Develop your message*
4. *Tell your story*

Before you start blasting your campaign or event around the new media or calling reporters, go over your goals and the story you are trying to tell. Do you want to influence a decision or policy? Do you want to create awareness? Do you want to build support for an activity or project? Do you want to change behavior? Keep your goals in mind as you craft your message and tell your story.

Define your audience
Once you have figured what you want to achieve through your communication, you need to think about whom you need to reach in order to meet this objective. This is your audience. You can have more than one target audience group – this will probably include the targets you developed in the campaign planning session, as well as the people you want to mobilize to join your campaign. Develop a profile of your audience – who are they, and what do they care about?

Develop your message
Keeping your goals and audience in mind, this is when you want to think about the message of your event. Or, how will you communicate your goals and the reasons they are important to your audience?

Write on butcher paper or whiteboard:

A good message:

- *Is specific;*
- *Communicates clearly to your audience (will likely change depending on your audience);*
- *Is linked to something they care about;*
- *Is believable and can be backed up by evidence/hard facts;*

- *Conveys a sense of urgency.*

Develop your story. If you don't have a good story, even the best message can get lost. The story is about a more emotional person al touch to your message. This is the why of your event, and its what people will take away. Facts and figures are great, but they won't win hearts and minds.

WHAT MAKES A GOOD STORY?

10 MINUTES

HANDOUTS

- **None**

GOALS

- **To build media strategy/pitching skills.**

MATERIALS

- **Flip chart**
- **Markers**

RUNNING THE EXERCISE

What makes a good story? What will reporters want to cover?

These may include the bolded qualities below, write best answers on butcher paper or whiteboard, pull out examples of a few of these categories from the group:

The NEW and fresh. The first thing to understand is that reporters, editors, bloggers, and even folks on twitter are deeply interested in what's new and fresh. By contrast, they're deeply uninterested in anything they perceive as old—as in yesterday's news. You should therefore always be thinking up new tactics and actions to call attention of reporters. Hook them with a storyline – everyone covering the news loves stories, here are a few to try out:

The superlative. Find a way to boast about your action. Is it the "first interfaith gathering in the area on global warming"? Is it "the longest march in Cairo in a decade"? Don't make outrageous claims ("perhaps the biggest" and "among the first" are useful phrases when you can't prove your superlative without a doubt).

David vs. Goliath. With the media, it can be an asset to be seen as the underdog – people always root for the little guy. Students pushing up against their administration can be a great way to drum up support.

Strange bedfellows. One of journalism's favorite narratives is the odd couple- people you wouldn't expect or who normally don't get along coming together. For example: Republicans and Democrats in the US, faith leaders and business leaders, veterans and student activists. Try teaming up with a local union, religious organization, athlete, or artist: any new alliance can make for a good story.

Current events (link your news to them). Was your administration recently in the news talking about climate change or clean energy technology? Was your campus/community recently affected by increasing pollution, an oil spill, or climate change related weather event? Take the opportunity to call up the media and relate your action to what they are already covering.

Think Visually. Climate change and divestment are challenging issues to convey – it's abstract to most people, and happening slower than your typical disaster. That's why staging actions that help visualize climate change or divestment can be very powerful for the community, and the media (this is a good one to pull examples from the group).

Use the right messenger. Having a good message is not enough; it is important to use the right messenger. A popular musician, athlete or celeb speaker may be more influential to your peers than a scientist or politician. On the other hand, your administration may be more receptive if strong student leaders, technical/financial specialists, or other university administrations deliver the message.

Photos – they say 1,000 words. The visual for your event is as important as your spokespeople, it is one more way to deliver your message to the wider public, media, and fellow 350 volunteers. Your action photo is KEY, its your best tool for leveraging your event in the media and the community after the fact. Here are just a few tips on getting it right:

- **Plan it: Use your message and goals when coming up with the image you want people to remember. Make sure you plan out photos before the event, and think out what props or signs will help tell your story.**
- **Designate a photographer: it could be a professional, a volunteer, a friend – whoever you can find who is reliable and can take a good photo.**

WORKING WITH REPORTERS

5 MINUTES

HANDOUTS

- **None**

GOALS

- **To learn best practices for building relationships with reporters.**

MATERIALS

- **Flip chart**
- **Markers**

RUNNING THE EXERCISE

Write the bolded steps below on butcher paper or whiteboard, and explain each step *briefly:*

Create a Relationship. The temptation when dealing with reporters is to send a press release and leave it at that. Ignore that impulse!
Get to know reporters and editors long before you need them for your story. Call or email and ask if you can meet with a potential contact for ten minutes early in your campaign. Journalists want to know the people in their communities who will be making news, and get a sneak preview of your plans. (Tip- this is also a great way to introduce yourself to bloggers!)
Once in the office, lay out the basic plan for your campaign and how it relates to your campus and community (and how it relates to what they write/ care about), the things you plan to do this semester, and the kinds of people you have involved so far. This isn't the time to press for commitments—all you're doing is establishing a relationship and demonstrating that you're a helpful source.

Choose a Media Coordinator. The first step to meeting your media goals is identifying ONE member of your team

to be your media coordinator. This person will hold the initial meetings and build relationships with reporters and editors–they will also edit your media advisories and templates, make follow up calls to press outlets, and coordinate with media at any events. The media coordinator doesn't necessarily need to be on camera, but they should be capable of identifying good messengers, capable and confident enough to speak in public, and optimistic and knowledgeable enough to sell your events to reporters. Your media contact should also be easily available–it doesn't matter how great a person they are if they don't return emails and calls from press quickly!

Build Last-Minute Buzz. In the final twenty-four hours before any event you want covered, you want to create an overwhelming sense of urgency around it in the newsrooms. Don't worry any longer about a single point of contact. Have 6-10 people call the news tips line (leave individual confirmation calls to your media coordinator) for every outlet the day before and of your event. Precisely because news is a last-minute business, journalists are set to cover things on the spur of the moment, and you want to provide that last push to get them into action.

TIPS FOR PITCHING YOUR STORY

5 MINUTES

HANDOUTS

- **None**

GOALS

- **To learn best practices for pitching a story to the press.**

MATERIALS

- **Flip chart**
- **Markers**

RUNNING THE EXERCISE

Write the bolded qualities below on butcher paper or whiteboard:

- **Keep it short!** Your contact is likely busy, so try to summarize your event and motivations in 3 sentences.
- **Be friendly!** Being pushy won't make them any more likely to show up, think about it like you would think about recruiting someone to show up at your event: you have to sell it.
- **Call between 10am and 2pm.** These are often slower times of day, so you are less likely to interrupt while they are trying to meet a deadline.
- **Don't forget the details:** Who, what, where, when, why, and make sure to ask if they are attending.
- **Have a hook.** Why is this news? What makes this event special? What's the local spin? High school students? Teachers? Local small business owners? Unexpected community leaders or alliances?

INTERVIEWING BASICS: APPOINTING AND BUILDING A POWERFUL SPOKESPERSON

10 MINUTES

HANDOUTS

- **None**

GOALS

- **To learn best practices for setting up interviews.**

MATERIALS

- **Flip chart**
- **Markers**

RUNNING THE EXERCISE

Write the bolded steps below on butcher paper or whiteboard, pull out examples of a few of these categories from the group:

Appoint Spokespeople. This section is full of great skills for everyone, but remember previous advice about messengers. When deciding on spokespeople for your event, choose stories and people who fit into your message.
Identify, train, and use your spokespeople as much as possible. Include your most interesting spokespeople in press advisories and releases, and make it clear that they are available for in-person or phone interviews in the week leading up to your event!
Spokespeople are great for building excitement for an event, streamlining the message that comes out of your event, and generating press, through interviews, after the fact. They don't have to be famous- they just have to have a hook and fit into your message. What makes them interesting? Sell them like you would sell the story- and your whole event will benefit!

Practice, Practice, Practice. it takes time to master the art of using interviews to further your message instead of simply responding to questions. With practice comes confidence: your goal is to deliver your message as concisely and clearly as possible!

Keep it short! The trick to getting the story you want in print or on TV is to only give the message you want. Like in the previous exercise- try to practice saying your goals, your personal motivations, and even describing your event in no more than 30 seconds each.

Personalize your message. Leave the wonky lingo for the halls of Congress; emotions win supporters and volunteers over facts every time. Use a personal touch as a part of every quote and quip. Some examples: "As a mother of a child with asthma, clean air is hugely important to my family." OR "As an avid hunter and angler, the ability to enjoy the outdoors is important to me- that's why I want to see laws in place to protect our environment against climate change."

Name your opponents and targets. Once you personalize yourself, don't be afraid to call people out. Is your local elected official holding up progress on bike lanes? Is your Senator leading the charge in climate denial? Or are they selling out to dirty energy industries instead of representing you? Name them. For example:
"As a mother of a child with asthma, clean air is hugely important to my family. Sherrod Brown's vote to gut the Clean Air Act was unacceptable, and it put special interests before the health of my family."
<u>If you don't know the answer, say so</u>–never guess! Nothing is "off the record." A great way to deal with this, especially if you are talking to a print journalist, is to offer to get back to them when you have the information they need.

Pivot! If the question they ask you is irrelevant to your story and message, pivot! That means that you move away from the question, usually with a connecting word, and then answer with your own message.
Stay calm and confident! Speak slowly, pause if you need to, and try to relax on camera- it will make you look more confident.

TEAM WORK: INTERVIEWS AND PIVOTING

40 MINUTES

HANDOUTS

- **None**

GOALS

- **To practices the skills discussed throughout the rest of the training, and to encourage good habits through practicing pitching stories and pivoting in interviews.**

MATERIALS

- **None**

RUNNING THE EXERCISE

Give participants 2 minutes to find a partner.

You are students at Hypothetical State University. Your university is heavily invested in the fossil fuel industry, and you are working with a group to convince your school to divest from the industry ASAP. You've petitioned your president, submitted requests to meet with her, written letters, and gathered support of students, community members, faculty and staff. Now, you are holding a sit-in in your administration building until your President and CIO agree to sit down with you to discuss the steps necessary to divest.

With your partner, take 10 minutes to come up with 2-3 talking points about the sit-in.

Have partners take 10 minutes to practice making pitches. Each try once and provide peer coaching after each person. Reflect on the most and least influential parts of each pitch/ story. What was most compelling? What was superfluous? What should they focus on next time?

Interviewers rarely ask you the questions you are prepping for: so now we are going to practice fitting your message into any question. That's when we pivot! The interviewer's job is to ask an irrelevant or provocative question, and the interviewee's job is to take that question and "pivot" to their pitch.

Give partners 10 minutes to practice pivoting.

Take 5 minutes to return to full group and reflect on lessons from the exercise. What works and what doesn't. Good transition words? Things to include? Things to leave out? Did you personalize it and then name your enemies?

NEGOTIATING WITH POWER

This training focuses on meetings as a tactic for demonstrating power to decision makers and negotiating campaign victories. Information has been drawn from the Midwest Academy Manual for Activists, a Sierra Student Coalition training template, and the organizing experience of the staff of the Responsible Endowments Coalition.

TOTAL TIME = 1.5 hours

WORKSHOP GOALS

- **Understand that meeting with decision makers can be used either to collect information or demonstrate power and win campaign victories. [Knowledge]**
- **Learn that meetings are part of greater campaign strategy, specifically as related to their targets and campaign goals. [Knowledge]**
- **Have learned common divestment arguments and responses. [Knowledge]**
- **Learn the negotiation process. [Knowledge]**
- **Practice using the process. [Skill]**
- **Feel confident about negotiating with decision-makers [Attitude]**

HOW TO PREPARE

- **Set up the room and arrange the chairs in a circle**
- **On large sheets of newsprint, write up:**
  - **Agenda and workshop goals**
- **Photocopy the handouts:**
  - **REC's Meeting with Decision-Makers handout**
- **Materials needed:**
  - **Flip chart**
  - **Markers**
- **Prep with your co-facilitator. Get to know each other's training style and strengths**
- **Check in with the organizer of the training to find out more about the groups experience level, the makeup of the group, and to confirm logistical arrangements.**

OVERVIEW

TIME	EXERCISE	GOAL	DESCRIPTION
5 minutes	Introduction: Why meet with decision-makers?	Why we meet with decision-makers, how our meetings fit into our strategic campaign plan, and how to negotiate victories from decision makers	Group brainstorm
10 minutes	Targets	Learn two methods for identifying targets.	Group brainstorm
10 minutes	Power	Understand where power comes from in negotiations	Group brainstorm

15 minutes	**Drowning in Arguments**	**Identify and refute common arguments**	**Interactive questioning**
15 minutes	**Process for an effective negotiation**	**Understand process for negotiations**	**Presentation**
25 minutes	**Role-playing**	**Apply content**	**Fish bowl**
5 minutes	**Debrief**	**Synthesize content**	**T chart**

INTRODUCTION: WHY MEET WITH DECISION-MAKERS?

5 MINUTES

HANDOUTS

- **None**

GOALS

- **Learn why we meet with decision-makers**

MATERIALS

- **None**

RUNNING THE EXERCISE

In this session we're going to go over why we meet with decision-makers, how our meetings fit into our strategic campaign plan, and how to negotiate victories from decision makers.

Let's start off by thinking about why we meet with decision-makers. Why do we meet with decision makers?

Brainstorm with the group. Here are some possible responses:

- **Ask questions and get information**
- **Find out who your target and secondary targets are for your campaign**
- **Make an ask/demand**
- **Test ideas and gauge support**
- **Deliver support from different stakeholders**
- **Get meetings with other people**
- **Establish a relationship**
- **Negotiate a specific agreement... in other words, WIN a campaign goal!**

Today we're most interested in negotiations where we demonstrate power and win campaign victories.

TARGETS

10 MINUTES

HANDOUTS

- **None**

GOALS

- **Understand how to identify primary and secondary targets.**

MATERIALS

- **Flip chart**
- **Markers**

RUNNING THE EXERCISE

A target is:

- A person
- Never an institution or elected body
- Has the power to give you what you want – your goals ("asks" or "demands")

Draw a circle in the middle of your flipchart with the word "Target." Ask participants to brainstorm targets aloud. Some responses might include:

- **Chief Financial Officer**
- **University President**
- **Executive Vice President of Finance**
- **Investment Manager**

A secondary target is someone who has power over your target. We can also have meetings with them.

Draw lines coming out of the "Target" circle. Ask the audience to brainstorm and write their responses at the end of the lines of the flip chart. Some responses might include:

- **University President**
- **A powerful trustee**
- **A business partner of the target**
- **Family member of the target**
- **University donor**

We should have meetings with our target and secondary targets. We should also think about the power we have over our target and secondary targets.

POWER

10 MINUTES
HANDOUTS

- **None**

GOALS

- **Brainstorm where power comes from in negotiations.**

MATERIALS

- **Flip chart**
- **Markers**

RUNNING THE EXERCISE

Power comes from two things: people and money. How do we demonstrate power in a meeting?

Give participants one minute to write down as many ideas as possible.

How do we demonstrate power in preparation of a meeting?

Give participants another minute to write down as many ideas as possible. Have participants share their ideas aloud. Some ideas are listed below.

Ideas for ways to demonstrate power in a meeting:

- **Controlling the agenda and setting the tone**
- **Filling the room with people**
- **Bringing leaders from campus coalitions (e.g. people of color coalitions or Greek life), student government, and special scholar programs**
- **Having students present from the various social sectors of the university – business students, Greek life, performance groups, community service groups, etc.**
- **Creating a space for people from directly-affected communities to speak at the meeting**
- **Having a sympathetic observer from another department of administration**
- **Media at the meeting**
- **Petitions signed by individual students, faculty, alumni, and donors**
- **Letters from faculty, alumni, and donors**
- **Petition or coalition of concerned student organizations**

Some ideas for ways to demonstrate power in preparation of a meeting:

- **Setting an agenda beforehand**
- **Creative actions in the days before the meeting**
- **Petition deliveries**
- **Showing up at administrators' on- and off-campus speaking engagements**
- **Rallies and demonstrations**
- **Call-in days for students, parents, alumni, and community members**

- **Postcard campaigns**
- **Talking to trustees, formally or informally**
- **Winning ballot measures**
- **Having a resolution passed**
- **Getting media**

DROWNING IN ARGUMENTS

15 MINUTES

HANDOUTS

- **None**

GOALS

- **Practice refuting common arguments.**

MATERIALS

- **Flip chart**
- **Markers**

RUNNING THE EXERCISE

Sometimes we get hung up by the arguments administration, big companies, and other folks make.

Ask folks for arguments they've had trouble answering. Write down the first four arguments on your flipchart. One idea is to draw a cloud, four big raindrops, and an umbrella. Write the arguments inside the raindrops. Ask people to brainstorm answers to these common arguments. Add information as you see necessary.

Note to trainers: ***Refer to "Common Arguments" in the Appendix.***

We won't win with arguments alone. But good arguments will keep us from feeling like we're drowning.

PROCESS FOR EFFECTIVE NEGOTIATION

15 MINUTES

HANDOUTS

- **None**

GOALS

- **Learn a step by step process for meeting with adminstrators.**

MATERIALS

- **Flip chart**
- **Markers**

RUNNING THE EXERCISE

Today we're most interested in negotiations where we demonstrate power and win campaign victories.

This process is specifically designed to address a negotiation process. A negotiation is a power tactic. It is a space to present demands, and demonstrate your power through supporting materials and allies.

At your first meeting though, you're going to want to spend more time getting to know your target, understanding the political context of your campuses, and gathering information. We are passing out REC's "Questions to ask at early meetings."

On the flipchart, list the words that are in bold below. Go over this process, allowing students to add in their experience throughout.

- Ambiance: Set the tone by paying attention to lights, seating, and who is at the head of table. It is sometimes best for the decision maker to be at head and have to look at lots of people. You might want to have leaders from student government sit next to them to remind them that student government supports your issue.
- Introduction: Students introduce themselves by stating their names and emphasizing the organizations and affiliations they have. You want to demonstrate that this is an issue that many students care about - those involved in athletics, Greek life, scholar programs, community service, the arts, etc. Also allow administrators to present themselves. You may ask them questions about themselves, but do not allow them to dominate the conversation.
- Story: Stories are stronger than generalizations. Talk about why you got involved and tell the stories of folks organizing in directly-affected communities. If any students in your group are from a directly-affected community, they can speak from their experience. Make sure you go over the rights violations that are occurring. Surprising statistics can also be helpful.
- Asks: Present your asks, or "demands." You should always state your long-term goal to administration, but accept short- and mid-term goals being fulfilled. These are your "fallback demands." It is important to state long term goals because sometimes we only state our fallback demands, win, and feel like it would be rude to go back and ask administration for more.
- Power: Present items that demonstrate your Power, such as petitions, letters, media articles, etc. You may want to have a student government rep present the petition.
- Common Arguments: Use information from past meetings and emails to refute common arguments. You may have a business student present business arguments and an environmental studies major present environmental arguments, to give credibility to your arguments.
- Negotiate: Assign 2 or 3 students to negotiate. They should know what fallback demands they can accept. They should set SMART outcomes that you can follow up about after the meeting is over. The following questions should be answered during the meeting:
    - How much will be done?
    - Who will do it?
    - On what date will action be taken?
    - If administration needs time, on what date will they make their decision? Should you have another meeting on that date?
- Thank you: Thank everybody in the meeting for their time and restate your agreement.

State the first letter of each word on the list: A-I-S-A-P-C-N-T. Can we think of a mnemonic to help us remember this process? Give participants a minute or so to come up with something silly or you can make a suggestion.

ROLE-PLAYING

25 MINUTES
HANDOUTS

- **None**

GOALS

- **Apply skills through practice.**

MATERIALS

- **None**

RUNNING THE EXERCISE

Option 1: Participants will break into groups (with ideally 4-6 people in each group, depending on how many trainers you have) and each will go with a different trainer. Shifting around will take a few minutes at the beginning and end of this activity.
Provide a sample campaign goal and fallback demand.

- Example goal: Divest from fossil fuels.
- Example fallback demand: Make a public statement that you will divest from the Filthy Fifteen by 2015.

You could also provide a different goal and fallback demand for each group.
Participants will then have 10 minutes to create a plan for the meeting (without the trainer) present and about 10 minutes for a role-play.

Option 2: If you do not have enough trainers or space, you can do a fishbowl activity instead. You can ask for 3-10 volunteers to do a role-play. Leave the room and give the group 15 minutes to prepare together. Everybody (those participating and those not participating) can prepare together. Come back to the group and do a 10 minute role-play.

Debriefing the exercise: What were some challenges? What were some things that worked well for your group?

DEBRIEF

5 MINUTES
HANDOUTS

- **None**

GOALS:

- **Create space for participants to think about how to apply this material in their lives.**

MATERIALS

- **None**

RUNNING THE EXERCISE

Create a + and ^ chart and ask participants to give feedback on what things were really helpful about the training and what things they might have wanted to do differently.

Give participants a small slip of paper and ask them to write down the thing from this training that they are most excited to apply on their campus. Have them crumple the paper and throw it into the middle of the room. Read 3-5

responses.

APPENDIX: COMMON ARGUMENTS

Responsible Investment is Broad; It Contains Multitudes

a. People often ask REC "but how much money will responsible investment gain/lose us?" The truth is, responsible investment is so varied that it is impossible to make those kinds of generalizations.
b. There are a variety of responsible investment opportunities in every asset class at above-, below-, and at-market-rate returns. If anyone says "responsible investment loses money" that is not a correct or nuanced statement.
c. Other kinds of responsible investment, such as Investing cash in community development financial institutions is so low-risk and low-reward that returns do not differ from "conventional" investment strategies. Just like with conventional investment methods, with some responsible investment methods it is impossible to say whether or not specific investment will lose money. Screening, community investment with assets classes other than cash, and fund manager engagement are all types of responsible investment in which it is difficult to predict exactly how they will stack up to conventional investment and it depends highly on the specifics of what that strategy would look like.
d. Good times to use this argument: This is one of the single best responses to the argument about losing money (or making less money) that either students or administrators may level. Rather than getting into the details about whether or not it does, make the audience realize that the larger issue is that we're not having a nuanced and well-informed conversation about the multitude of options out there.

The Risk Mitigation Argument

a. The whole purpose of an endowment is to create a sustainable and stable source of income for a school for generations to come. Fiduciaries shouldn't want to deal with too much risk. (Shouldn't being the operative word here.)
b. Responsible investment mitigates long-term risk by identifying potential environmental, social, and governance (ESG) risks before they become portfolio risks. Consider catastrophes such as BP's Deepwater Horizon oil spill and the Fukushima Daiichi nuclear power plant disaster; these catastrophes occurred partially because of environmental and governance failures. Responsible investment addresses ESG risks and factors that conventional investment does not factor into the price of investment.
c. Responsible investment is the best means by which to mitigate long-term risk, as it rewards companies and investments that are truly sustainable, and will therefore be profitable in the long-term, not just the short-term.
d. Good times to use this argument: When talking to someone (usually an administrator) who understands that a key concept in investing is risk. This is a very broad argument, but can be helpful in general philosophical terms.

The Inevitability Argument

a. Responsible investment is a growing trend and it's going to happen sooner or later regardless of if your administration agrees with it
b. More and more alumni, students, and other stakeholders are advocating for the adoption of responsible investment principles for their institutions and will continue to do so as the national movement and awareness grows. "There are three steps in the revelation of any truth: in the first, it is ridiculed; in the second, resisted; in the third, it is considered self-evident." -- Kristina
c. Universities, as innovators of society and educators of the next generation, <u>will</u> follow the demands of their campus communities regardless of whether or not key decision makers think it's the "right time."
d. We can do this now, or we can do it later, but it's going to happen sooner or later.
e. Many other institutional investors have adopted responsible investment practices. Foundations like Wallace Global have divested from dirty energy. Two of the nation's largest pension funds, CalPERS and CalSTRS,

have already allocated $1.1bn into energy efficient infrastructure projects with commitments with American Federation of Teachers, AFL-CIO, and Clinton Global Initiative to collectively invest $10bn in the clean energy economy. Institutional investors are moving away from coal and investing in the growing green economy and your school has the opportunity to spearhead this change among educational institutions.

f. Good times to use this argument: when either students or administrators categorically rule out the possibility of responsible investment happening at a school in the near future.

Prove It? No, You Prove It: Why The Burden of Proof is on the Administration

a. This is not an argument about doing responsible investment, but why administrators must be the ones to do their own due diligence, rather than employing the tactic they often do, which is saying "We'll do it if students can prove to us that it's viable."
b. Committees on investor responsibility, or CIRs, provide a permanent space for research, dialogue, and action relating to responsible investment. In the short term, CIRs are a good way to ease the school administration into understanding responsible investment and creating buy-in amongst various university constituencies.
c. However, holistically integrating ESG issues into a university's investment policy takes time, money, and energy. It is unfair, unreasonable, and unrealistic to place the burden of responsibility solely on the shoulders of student groups, who often lack the financial and educational resources to investigate ESG issues on campus and need the guidance and experience that the university administration can share.
d. When to use this argument: When administrators say "prove it" to whatever you say.

Endowments Are Already Political: The Implicit Responsibility Argument

a. Investing in a particular company both implicitly and explicitly supports that company's practices.
b. Some people might argue that by implementing responsible investment, you will be "politicizing" your school's endowment. But the truth is, your school's endowment is already politicized.
c. Every corporation—whether is it General Electric, Chevron, Whole Foods, or Google—has a political agenda, so there is no such thing as a politically neutral endowment. Responsible investment is about making sure that the politics of your school's endowment aligns with the values it espouses in its mission statement and other commitments.
d. <u>Not engaging or even thinking or dialoguing about the social or environmental impacts of investments is very much a political stance.</u> That in itself is one of the most politicized stances one can take.
e. When to use this argument: When people talk about 'politicization' of the endowment.

NEXT STEPS AND CLOSE

TOTAL TIME = 1 hour

WORKSHOP GOALS

- **Wrap up the day with clear next steps.**
- **Give participants space to share reflections. We've included one exercise you might choose to use for this (Head, Hand and Heart), but there are many closing exercises that would serve the same purpose. Choose any exercise you think will work best for your group.**

HOW TO PREPARE

- **Set up the room and arrange the chairs in a circle**
- **On large sheets of newsprint, write up:**
  Next Steps:
- **Materials needed:**
  - **Butcher paper and markers**
- **Prep with your co-facilitator. Get to know each other's training style and strengths**

OVERVIEW

TIME	EXERCISE	GOAL	DESCRIPTION
15 min	Next Steps	Wrap up the day with clear next steps.	Elicit next steps from the group and assign roles/tasks
15 min	Head, Hand and Heart	Give participants space to share reflections	Everyone shares a reflection from the training.

NEXT STEPS

15 MINUTES

HANDOUTS

- **None**

GOALS

- **Wrap up the day with clear next steps.**
- **Develop clear roles and responsibilities for participants going forward.**

MATERIALS

- **None**

RUNNING THE EXERCISE

 What are some of the next steps you see your campus group taking? What are some of the next steps you see yourself taking?

 On the flipchart, list responses. Be sure to record individual tasks and commitments with the name of the

person committing. After the training, have a trusted volunteer type up the next steps and send out to all participants.

HEAD, HAND AND HEART

15 MINUTES

HANDOUTS

- **None**

GOALS

- **Provide space for students to share reflections on the day.**

RUNNING THE EXERCISE

Have participants stand in a circle.

We just covered a lot of ground, and I'm sure we're all processing all the ways we want to take what we learned to heart and to action. Let's wrap up our work with an exercise called head, hand and heart. I'd like each of us to share something we want to think more deeply about (our heads), something we want to take action on (our hands), or some feeling that this training has inspired in us (our hearts).

You can choose to end this exercise with whatever feels right for your group's energy. It may be a group cheer, a big group hug, or having each member of the circle pat each other on the back and say "I got your back." It's up to you!

Credits

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350.org, and Responsible Endowments Coalition