

2020 Vision:

Strategy Meeting Facilitation Guide and Worksheet

This is a comprehensive guide to help you plan, strategize, and implement your vision for 2020 and beyond. Before you delve in, it will be useful to keep in the mind the following:

- *We suggest that you print it out so you can make notes in the worksheet section.*
- *We know the length might be intimidating, but don't worry---when going through the document, just use the parts that apply to your group. And, feel free to adjust as you see fit.*
- *After completing this worksheet, your next step will be to plot out a timeline that notes benchmarks (e.g. 300 doors knocked by June 1st) and important dates of events (e.g. primary elections in your state, the Democratic convention).*
- *Once you've created your plan, go over it with your organizer. They can offer support and advice to help you make 2020 a success.*

What is your group's vision for 2020?

The last three years have felt like three centuries, but the year we finally defeat Trump at the ballot box is upon us. This conversation guide is intended to help your group set goals, strategies, and tactics to be successful in your grassroots organizing work. For reference, here are some of the driving focuses for Indivisible's national work this year:

- 1. Beat Trump, flip the Senate, and hold the House.** We believe next year's federal elections are absolutely mission-critical -- they are a make or break for whether we can save our democracy.
- 2. Constructive primaries that center progressive issues. Engaging with value-based issues,** Particularly a day-one democracy agenda and people-first immigration reform, will be essential to winning in 2020. We can't advance critical issues in 2021 if candidates don't run, and win, on progressive stances.
- 3. The Indivisible movement gets stronger.** To be successful, the organization and groups will need to come together for national movement moments, grow sustainable capacity, and motivate more people to take impactful action with the Indivisible community .

Your group's goals should reflect your purpose and priorities. Which of these priorities speak to you and your group? What other priorities -- like winning state



and local elections, or passing state legislation -- will your group be working toward in 2020?

Resources

To help you make the most strategic plan possible we've included some resources, most notably the priority states overview which is a listing of key races across the country that you can get involved with. You might live in one of the states/districts but, if you don't, you can still help by phone banking, texting, or even traveling to knock doors.

Key planning questions

As you work through this conversation guide, we offer some organizing questions to add depth to manifest the vision your group creates together.

- What do we want to accomplish in 2020?
 - There are a lot of issues and key races in 2020 to which we can focus our energy and implement real change. How do you fit into this picture? Will it be by making 1,000 phone calls over the course of the year? Or knocking 750 doors? What can, and will, you do to help create the world we want to live in?
- What do we need to accomplish it?
 - What resources do you need? Is it people power? Is it a website? Is it more leaders? A statewide structure? Training from Indivisible staff? Think about what tools would be the most useful, and necessary, for you to succeed in hitting your goal(s).
- When do we want to accomplish it?
 - Will you be having monthly meetings? Bi-weekly actions? What milestones do you want to set for yourself? For example, perhaps you want to recruit 50 more members before the convention in July. Or, maybe you want to have 5 events, between now and November, where you interact with (at a town hall, via birddogging, or maybe visibility) and push your local MOC on a specific issue. Think about all the buckets of work you could be doing and create a timeline for your group.
- How many people do we need to accomplish each item?
 - Recruitment and capacity is key to effective organizing. How many people are currently in your group? If you want to knock 750 doors, how many members/activists will you need to make that happen? Are there people who are virtual members that you can galvanize into action? Think about how you will recruit and retain an energized group who is ready and willing to hit the streets.
- What roadblocks do we anticipate?

- Have you had a difficult time recruiting new members? Is cold weather going to keep people away from canvassing in the winter months? This is a good time to take a look at the landscape and assess any foreseeable challenges.
- How will we overcome them?
 - Once you have assessed the challenges, how are you going to overcome them? Perhaps, if cold weather is an issue, you decide to phonebank in the winter months and then mobilize members to knock doors in the spring (don't forget to put this in your timeline!).
- Where do we want to be in 2021?
 - Our work doesn't end on election day. So, visualize the world you want to see in 2021. Imagine that Trump has been ousted and we have a Democratic President in the White House. What's next for your group? You might want to have formed a statewide structure in order to better help coordinate amongst groups and hold the new President accountable. Or, maybe you have decided that your group needs more leaders to be better equipped to handle the work of 2021 and beyond. What will you do over the course of the year to keep your group energized, engaged, and forward thinking?

After your planning session, you should work with your organizer to help set goals and determine the best way to implement your plan to best set you up for success. With all that said, let's get to work!

Electoral Work

Indivisibles are motivated to make local change happen, engage with their community, and elect good candidates with good ethics who will create good government for all. This means using their electoral skills and getting involved in elections to help candidates win.

General elections

First, decide where to focus. Which elections are most important to your group? Which ones are you planning to do some work in? Check all that apply. You can have the biggest impact where you live, so think about whether you live in a key presidential battleground state, a state with a Senate election, and/or in or near a competitive House district. But Indivisibles from anywhere will be able to talk to voters in key presidential battlegrounds and Senate and House races, too.

- Beating Trump/winning the presidency
- Taking back the Senate
- Holding or winning House seats in your area
- State and local elections in your area

Other: _____

If you checked the presidential race as being important to your group, how will you impact it? Check all that apply.

- Canvass locally (preferred if you live in a presidential battleground state)
- Canvass within the state (preferred if you live in a presidential battleground state)
- Canvass outside of the state
- Phonebank locally (preferred if you live in a presidential battleground state)
- Phonebank within the state (preferred if you live in a presidential battleground state)
- Phonebank outside of the state
- Text bank within the state
- Text bank outside of the state
- Other
 - When would your group take these actions?
 - We're ready to start!
 - After the nominee is chosen through the general election
 - Other

If you checked the Senate as being important to you, how will you impact it? Check all that apply.

- Canvass locally (preferred if you live in a state with a Senate race)
- Canvass within the state (preferred if you live in a state with a Senate race)
- Canvass outside of the state
- Phonebank locally (preferred if you live in a state with a Senate race)
- Phonebank within the state (preferred if you live in a state with a Senate race)
- Phonebank outside of the state
- Text bank within the state
- Text bank outside of the state
- Other
 - When would your group take these actions?
 - We're ready to start!
 - After my state's primary
 - Other

If you checked House elections as being important to you, how will you impact them? Check all that apply.

- Canvass in your own district
- Canvass in a nearby district
- Canvass outside of the state



- Phonebank in your own district
- Phonebank in a nearby district
- Phonebank outside of the state
- Text bank in your own district
- Text bank to another district
- Other
 - When would your group take these actions?
 - We're ready to start!
 - After my state's primary
 - Other

If you checked state and local elections as being important to you, please answer the following questions.

- Are you focused on a gubernatorial election, state legislative elections, or other elections? Check all that apply.
 - Gubernatorial election
 - State legislative elections
 - Other: _____
- How do you want to impact these elections?
 - Canvassing
 - Phonebanking
 - Text banking
 - Other: _____
 - When would your group take these actions?
 - We're ready to start!
 - After my state's primary
 - Other

Working with out-of-state Indivisibles

Do you live in a key presidential battleground state, a competitive Senate state, a competitive House district, or none of the above? Check all that apply.

- Presidential battleground
- Competitive Senate state
- Competitive House district

If you checked yes that your group lives in a presidential battleground state, a competitive Senate state, OR a competitive House district: would your group want to receive out-of-state help from other Indivisible groups?

- Yes
- No
- Unknown
 - If yes, what kind of help would you want from them?

- Canvass locally
- Canvass within the state
- Phonebank into the state
- Text bank into the state
- Other

Primary Elections. Will your group be doing electoral work during the primaries?

- Yes
- No
- Unknown
 - If yes or unknown, which primary elections will you participate in?
Check all that apply.
 - Presidential
 - Senate
 - Congressional
 - State Legislature
 - Other
 - If yes or unknown, which actions and where would your group like to do electoral work?
 - Canvass locally
 - Canvass within the state
 - Canvass outside of the state
 - Phonebank locally
 - Phonebank within the state
 - Phonebank outside of the state
 - Text bank within the state
 - Text bank outside of the state
 - Other
 - When would your group take these actions?
 - We're ready to start!
 - We'd need to endorse a candidate first
 - Other

Electoral Work Identity

At your first general meeting in the new year, dedicate time to an intentional conversation about your group's culture and identity around how you show up doing electoral work. For example, do your members knock #alldamnddoors or are they flakey? Is your identity that you're chatty Cathys at a phone bank, or do you churn through lists until the last minute of your shift? As new people join your group



who haven't supported campaigns before, you'll want to help them assimilate your group's identity.

Recommendation: Have a flip-chart or white board, and prompt a popcorn discussion with "How we will show up in 2020." Scribe down answers for 5 minutes, and synthesize an identity statement from the offering.

Example, "Indivisible Awesome members knock #alldamnddoors in our communities because we love talking to our neighbors about the candidates we support. We are responsive to calls to action. As individuals we participate to the best of our ability in an action that interests us as well as try new ones. We are reliable, trained volunteers who always find ways to have fun as we work to win."

State Legislative Advocacy

Redistricting will impact all 50 states starting in 2020 through the next decade. Learn more about how your state does redistricting [here](#)

Coordination.

- A) With whom is your group working on state leg initiatives and actions? Check all that apply.
- Just ourselves
 - Progressive partners
 - Issue advocacy experts
 - With other Indivisible groups who we share an elected representative with
 - With other Indivisible groups through our statewide structure
 - Other
- B) How have your state leg efforts been organized previously?
- We show up for Indivisible's calls to action
 - We have an advisory committee made up of our own members for each or some of our electeds that takes the lead on how the group takes actions towards them.
 - We participate in other Indivisible groups' calls to actions in good faith and solidarity.
 - The steering committee creates the state leg actions.
 - The lead on a state leg working team within the group creates or organizes state leg actions for the team or whole group to participate in.
 - Other
- C) Does your state have a statewide structure used for state leg work?
- Yes
 - No

- If no, what can your group do to help form a statewide structure?

Actions.

D) Which actions for state leg work did you do in 2019?

- Tabling
- Call-in day
- In-district office visit
- Lobby day at the capital
- Protest/rally
- Canvass
- Phone bank
- Statewide letters
- Minimal to no actions
- Other

E) Which actions for state leg work do you want to do in 2020?

- Tabling
- Call-in day
- In-district office visit
- Lobby day at the capital
- Protest/rally
- Canvass
- Phone bank
- Statewide letters
- Minimal to no actions
- Other

Scaled Support. Is your group aware of Indivisible's scaled support opportunities for state leg work?

- Yes
- No
- Unknown

Let's summarize what your group has done for state leg and set a new goal for 2020. (Group name) did state legislative work with __ (answer from question A) __, which was organized by __ (answers in question B) __. We did these actions: __ (answers from question D) __.

Our new goal for 2020 is to do more state leg work through these actions: __ (answers from question E) __. We will work in collaboration with __ (suggestions in question A) __. We're going to build more leadership capacity and increase

member mobilization to participate in state leg actions.

Next step is to invite members to take on key organizing roles to execute the actions you've identified are your top priorities this year.

Sustainability

2020 is going to be a year unlike any other, and it's critical that Indivisible groups sustain their energy and mission to manifest their vision of a 2021 with a progressive federal government. Sustainability takes many forms, so let's explore the needs of your group for 2020.

Leadership sustainability.

Did members of your group attend a Regional Indivisible Institute in 2018?

- Yes
- No

Did members of your group attend an in-person statewide training, convening, or gathering in 2019?

- Yes
- No

Would members of your group be interested in participating in an organizer skills assessment to identify your strengths and areas for growth?

- Yes
- No
- Unknown

Pro-tip! Below are some healthy habits of leadership teams.

- Have a regular, routine planning period either online or in-person
- Have clearly defined roles
- Have a training for new steering committee members
- Learn how technology can streamline your steering committee work

Member Sustainability.

A) Who is coming to your meetings and actions? Check all that apply.

- 1-10 new people we've never met before and we're really excited.
- Our steadfast, core members who have been with the group for years.
- 1-10 people who have an inconsistent attendance to events, and we know who they are.
- We're seeing more people energized to take on leadership roles within the group.

- Our members are bringing people from their social networks to our actions and meetings
- Fewer people are attending our actions and meetings, and we don't know why.
- Members who have been in lead roles in the past are stepping out of those roles or have left the group.
- Other

B) What actions are you currently doing to recruit active, inactive, and first-timers to your events?

- Our members phone bank or text our own membership list before an action or meeting with a personal invitation to attend.
- We ask members to write LTEs ahead of our upcoming actions or meetings.
- We create an event online (Facebook, Action Network, etc) to raise awareness about our action or meeting.
- We send out 1+ emails about each event.
- Sending postcards or invitations to them about an upcoming action.
- Other

C) Who do you want to recruit to become active members of your group? Start small and pick 2.

- People who lurk in your Facebook group.
- People on your email list.
- Voters who show up for primaries.
- People in particular neighborhoods.
- People who bring a diversity of age, race, ability, etc.
- People who belong to particular organizations.
- People who are members of partner groups or organizations.
- Other

You are more than a political activist; you are a grassroots organizer! In fact, every member of your group can be empowered to be an organizer as well. Let's review what has been working for your group in terms of sustainability.

What does your Indivisible community mean to its members?

- Do people feel safe, seen, heard, honored and respected in your group?
- Does your group prioritize cultivating relationships? If so, how?

From question A, if attendance to your events and actions has been decreasing over time, what are some ideas you are willing to try to turn that around?

- If attendance has been on the rise, what are the factors contributing to the increase?

From questions B & C, how are you going to get the people you've identified as wanting to activate to show up to events? Are there any new ideas you are willing to try out?