



**CALIFORNIA TOBACCO
ENDGAME CENTER FOR
ORGANIZING AND ENGAGEMENT**

A project of the American Heart Association.

Midwest Academy Strategy Chart

November 19, 2020

Christian Vierra, Organizing and Engagement Manager | Kathy “Toki” Ko, Organizing and Engagement Manager
Paul Kneprath, Project Director



Housekeeping



be a good friend
to everyone



raise your
hand to talk



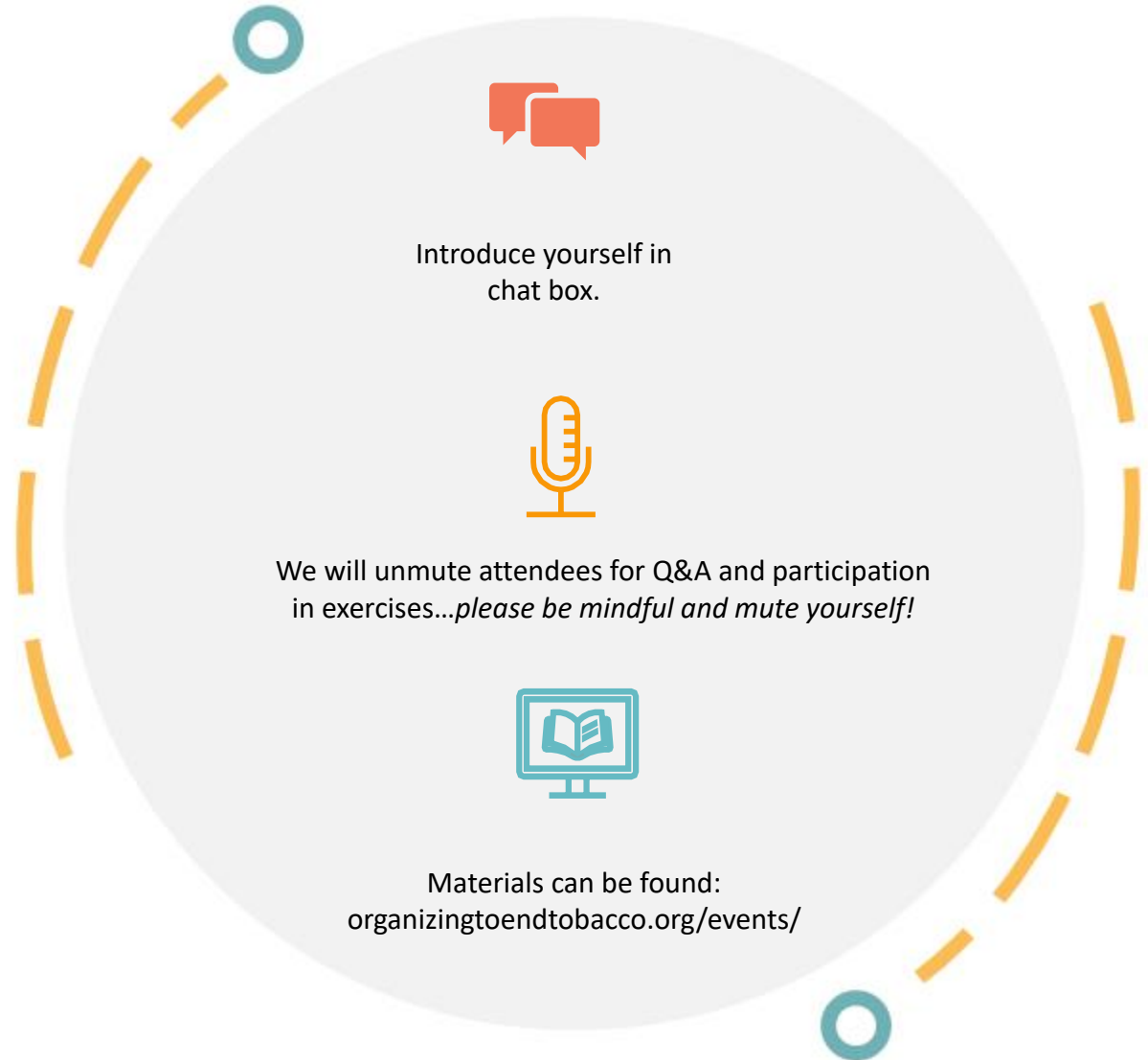
listen



stay in chair



no sleeping



Tobacco Endgame Center for Organizing & Engagement

Serving the community organizing and engagement needs of California's tobacco control community.



Technical Assistance

One-on-one/group consultation
Coalition Development &
Strategy
Media Advocacy



Resources

Organizing Toolkit
Campaign Playbook
Materials Translation
Training



Community Organizing & Engagement

Media Advocacy
Affinity Calls
Webinars



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Technical Assistance: organizingtoendtobacco.com/SupportGateway

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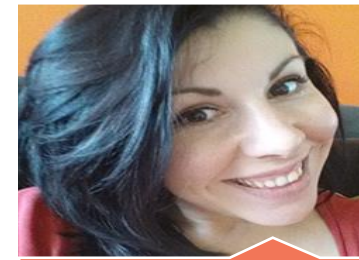
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Agenda

Learning Objectives

Overview of Midwest Academy Strategy Chart

Goals, Organizational Considerations, Constituency People Power, Decision Maker, and Tactics and Tasks

MASC Group Activity: “Tropical Town”

Conclusion

Q&A



Learning Objectives



Understanding the role
the MASC plays in
campaign planning.

Learn the 5 Major
Strategy Elements of the
MASC.

General understanding
of completing a MASC.



Goals	Organizational Considerations	Constituency People Power	Decision Maker (DM)	Tactics and Tasks
Goals are always concrete objectives to improve lives. They should be SMART (Specific, Measurable, Achievable, Relevant, and Time Bound).	Be specific and quantitative! How much, how many? Use Numbers.	Be specific. These are individuals and not institutions. List the name of the specific person in each organization.	The person who has the power to give you what you want! DMs are always individuals, not institutions.	Tactics are activities that directly engage a DM. Tasks are activities that support achieving a tactic. These are how you will show power to the DM so they will say yes to the goals.
<p>Long-Term Goal What you ultimately want to accomplish.</p> <p>Intermediate What you are trying to win now.</p> <p>Short-Term A step toward the intermediate goal.</p>	<p>Current Organizational/Coalition Resources What resources can you put in now?</p> <ul style="list-style-type: none"> • Staff available • Social media lists • Time available • Office resources (space, technology, equipment, etc.) • Budget <p>How will you Build Your Organization?</p> <ul style="list-style-type: none"> • Number of new members needed • Consideration of quality and diversity of members • Public recognition 	<p>Who cares about the issue: Constituents and Allies</p> <ul style="list-style-type: none"> • Whose problem is it most directly? • What do they gain if they win? • Who else will be an ally on this issue? • What power do they have over the decision maker (DM)? • How are they organized, where can you find them? • What risks are they taking? <p>Opponents</p> <ul style="list-style-type: none"> • Can you neutralize and/or divide opponents? 	<p>Decision Makers</p> <ul style="list-style-type: none"> • Elected, appointed, or a corporate power? • Do you have electoral or consumer power? • Analyze your current and potential power over them concretely so that you can use the relationship and your resources strategically. 	<p>Show Power Directly to the DM</p> <ul style="list-style-type: none"> • Letter/email writing • Petitions • Phone banking • Social media spotlight • 1 on 1 meetings with DM • Media events • Rallies <p>Public Education and Organization Building</p> <ul style="list-style-type: none"> • Media events, etc. • Social media messages • Rallies/Banners • Townhall meetings

Midwest Academy Strategy Chart

Constituency: People Power

	Constituents	Allies	Opponents
Definition	Individuals and organizations in your targeted jurisdiction that are impacted and have the capacity to engage with your campaign and support your issue.	Those with a vested interest in the issue and who can/will support your campaign.	Those who will, or may, actively stand against your campaign and policy. Opponents are <u>not</u> DMs.
Example	<ul style="list-style-type: none"> Who: Local University <u>Student</u> Role: President of a student union leadership group. Interest: Personally affected, common interest, expand their network, leadership development use and value their existing skills. Impact: Will write letters of support, testify at City Council meetings, engage their membership. 	<ul style="list-style-type: none"> Who: Employee for non-profit public health <u>organization</u>. Role: Field Advocacy Manager Impact: Able to write letters of support, testify at City Council meetings, and provide technical assistance; can lobby DMs. Contact Information: [email, phone] 	<ul style="list-style-type: none"> Who: Director of a pro-vaping organization. Role: Director, leadership Impact: Able to lobby DMs using cultural/religious traditional argument and well-funded opposition tactics. Contact Information: [email, phone]

Decision Maker (DM)

	DM Example #1	DM Example #2	DM Example #3
DM	Council Member A <ul style="list-style-type: none"> Position: <u>Undecided</u> Elected by X% of voters Research: Utilize information obtained from your DMM & COI for this table. 	Council Member B <ul style="list-style-type: none"> Position: Leaning <u>Yes</u> Appointed by Mayor to vacant seat Power Analysis [COI + DMM results] 	Mayor Pro-Tem <ul style="list-style-type: none"> Position: Solid <u>No</u>
	<u>Approaches</u>		
	How much and what kind of power is needed to influence and gain the support of the undecided DM?	Coalition must solidify the DM's support and <i>get a direct commitment from them</i> confirming that a YES.	Rarely should you use time and effort on a DM that is a known opponent of the policy.
	Example: Councilmember A is affiliated with the Boys & Girls Club. Coalition must work to gain Boys & Girls as an ally to influence Councilmember A and gain their support.	Even if you think a DM is leaning toward supporting the policy, it is critical that you use your power to move them into the fully supportive position.	

Tactics and Tasks

	Decision Maker	Tactics	Tasks
Definition		Tactics are activities that directly engage a DM. Tactics are not mutually exclusive to one DM, you may also develop multiple tactics for a single DM.	Tasks are activities that help you achieve a tactic. It is critical to identify and itemize the individual tasks needed to achieve each tactic.
Example	Council Member A Elected by Voters Position: Undecided	Coalition members will send emails and make phone calls to Council Member A and recruit other contacts to join in this activity.	<ul style="list-style-type: none"> Recruit # __ volunteers from Council Member A's District. Train volunteers on best practices on how to effectively communicate with DMs. Coordinate time and space for phone banking. Draft emails to send to DMs. Draft phone scripts for volunteers to utilize. Send emails to DM's. Deploy volunteers.

Organizational Considerations

	Current Organizational/Coalition Resources	How Will You Build your Organization?	Internal Problems
Definition	What resources do you have to contribute now?	What do you need/lack to build your organization/campaign?	What internal issues/problems do you need to overcome?
Example	<ul style="list-style-type: none"> Three non-English language speaking volunteers Community Engagement Coordinator trained to conduct surveys Supplies: 5 laptops, Zoom License, 3 printers 	<ul style="list-style-type: none"> New members to recruit Consideration of quality and diversity of members Public recognition Supplies needed <p><i>Tip: Having a robust number of constituents and allies is important, but what is more helpful for your campaign is determining the quality of skills and support from your core supporters.</i></p>	<ul style="list-style-type: none"> Communication issues High staff turnover Uneven work distribution Lack of community-based leadership where the campaign takes place

Goals

	Long-Term Goals	Intermediate Goals	Short Term Goals
Definition	What you really want for your community in the long run.	What policy, systems, or environmental change you are trying to win.	An essential step to achieve your intermediate goals.
Example	"Protect all residents living in multi-unit housing within the City from secondhand smoke exposure by December 2025."	"Pass a comprehensive smoke-free multi-unit housing ordinance (that includes 100 percent of homes, and spaces within 25 feet of all windows and doors) in the City by December 2022."	"Recruit The Environmental Commission as an ally and obtain a commitment from them to positively influence the Mayor Pro-Tem on a comprehensive smoke-free multi-unit housing ordinance."



Specific



Measurable



Achievable



Relevant



Time Bound

Let's Dive Deeper Into the MASC Sections

Goals

Goals are always concrete objectives to improve lives. They should be SMART (Specific, Measurable, Achievable, Relevant, and Time Bound).

Long-Term Goal

What you ultimately want to accomplish.

Intermediate

What you are trying to win now.

Short-Term

A step toward the intermediate goal.

Organizational Considerations

Qualitative and quantitative! How many? Use Numbers.

Organizational/Coalition

Resources can you put in

Available media lists
Available resources (space, technology, equipment, etc.)

How you Build Your Coalition?

Priority of
Strategy
of
coalition
building

Process
essentials

Constituency People Power

Be specific. These are individuals and not institutions. List the name of the specific person in each organization.

Who cares about the issue: Constituents and Allies

- Whose problem is it most directly?
- What do they gain if they win?
- Who else will be an ally on this issue?
- What power do they have over the decision maker (DM)?
- How are they organized, where can you find them?
- What risks are they taking?

Decision Maker (DM)

The person who has the power to give you what you want! DMs are always individuals, not institutions.

Decision Makers

- Elected, appointed, or a corporate power?
- Do you have electoral or consumer power?
- Analyze your current and potential power over them concretely so that you can use the relationship and your resources strategically.

Tactics and Tasks

Tactics are activities that directly engage a DM.

Tasks are activities that support achieving a tactic. These are how you will show power to the DM so they will say yes to the goals.

Show Power Directly to the DM

- Letter/email writing
- Petitions
- Phone banking
- Social media spotlight
- 1 on 1 meetings with DM
- Media events
- Rallies

Public Education and Organization Building

- Media events, etc.
- Social media messages

Goals

SMART Goals



Types of Goals

Short, Intermediate, and Long-Term

Goals are the results of your coalition's aim or desire to be tobacco-free in your city/cities.



Short term

Smaller victories you must achieve along the road to win your intermediate goals.



Intermediate

Efforts focusing on current policy/policies or campaign goals that you hope to win with your decision makers.



Long term

These are goals you and your coalition eventually hope to win much further down the line. This is the big picture goal that your campaign is helping to accomplish.



Examples of Goals



Specific



Measurable



Achievable



Relevant



Time Bound

	Long-Term Goals	Intermediate Goals	Short-Term Goals
Definition	What you really want for your community in the long run.	What policy, systems, or environmental change you are trying to win.	An essential step to achieve your intermediate goals.
Example	"Protect all residents living in multi-unit housing within the City from secondhand smoke exposure by December 2025."	"Pass a comprehensive smokefree multi-unit housing ordinance (that includes all homes of two or more units per building) in the City by December 2022."	"Recruit a tenant association as an ally and help obtain a commitment from them to positively influence the Mayor Pro-Tem on a comprehensive smokefree multi-unit housing ordinance."



Organizational Considerations

Be specific and quantitative! How much, how many? Use Numbers.

Current Organizational/Coalition Resources

What resources can you put in now?

- Staff available
- Social media lists
- Time available
- Office resources (space, technology, equipment, etc.)
- Budget

How will you Build Your Organization?

- Number of new members needed
- Consideration of quality and diversity of members
- Public recognition

Internal Problems

How to resolve or reduce.

Organizational Considerations

Be specific and quantitative! How much, how many? Use Numbers.

Current Organizational/Coalition Resources

What resources can you put in now?

- Staff available
- Social media lists
- Time available
- Office resources (space, technology, equipment, etc.)

How will you Build Your Organization?

- Number of new members needed
- Consideration of quality and diversity of members
- Public recognition

Internal Problems

How to resolve or reduce.

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Public Education and Organization Building

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Organizational Considerations

Current/Needed Resources and Internal Problems

	Current Organizational/Coalition Resources	How Will You Build your Organization?	Internal Problems
Definition	What resources do you have to contribute now?	What do you need/lack to build your organization/campaign?	What internal issues/problems do you need to overcome?
Example	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> 100 contact coalition email list <input checked="" type="checkbox"/> 3 non-English language speaking volunteers <input checked="" type="checkbox"/> Community Engagement Coordinator trained to conduct surveys <input checked="" type="checkbox"/> Supplies: 5 laptops, Zoom License, 3 printers 	<ul style="list-style-type: none"> <input type="checkbox"/> Expand 100 contact email list to 200 contacts <input type="checkbox"/> 3 non-traditional coalition members <input type="checkbox"/> Public recognition: Earned media every 6 months in local newspaper <input type="checkbox"/> Supplies needed: Premium Zoom Account 	<ul style="list-style-type: none">  Communication issues  High staff turnover  Uneven work distribution  Lack of community-based leadership where the campaign takes place





Questions So Far?

Constituency People Power

Be specific. These are individuals and not institutions. List the name of the specific person in each organization.

Who cares about the issue:

Constituents and Allies

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- What risks are they taking?

Opponents

- Can you neutralize and/or divide opponents?

Organizational Considerations

Be specific and quantitative! How many? Use Numbers.

Organizational/Coalition

What resources can you put in? Available media lists, available resources (space, technology, equipment, etc.)

How do you Build Your Coalition?

Constituency People Power

Be specific. These are individuals and not institutions. List the name of the specific person in each organization.

Who cares about the issue:

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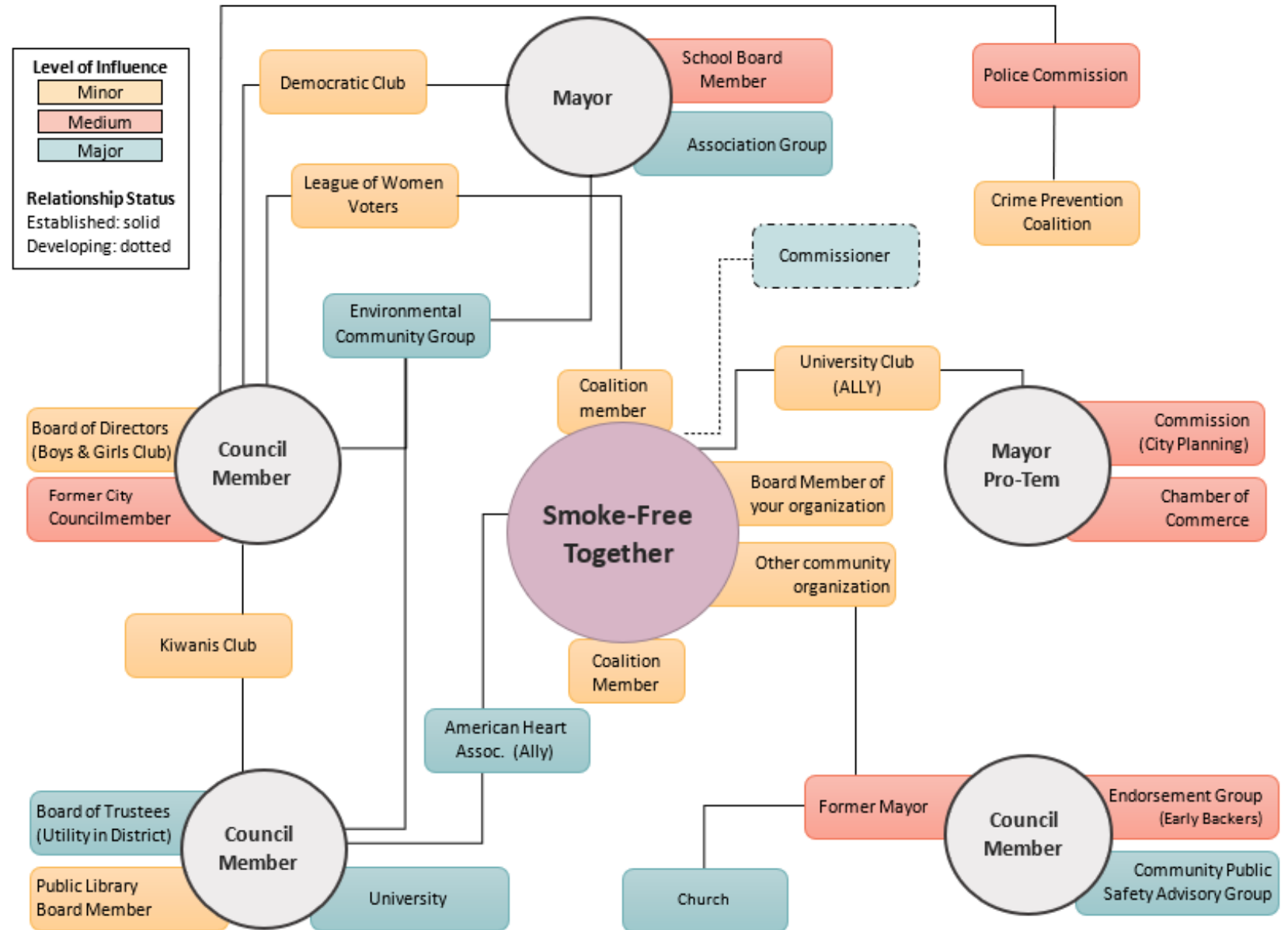
Public Education and Organization Building

- Media events, etc.
- Social media messages

Constituency People Power

Circles of Influence

This tool and process helps you to determine your allies and constituents and how much influence and power each has.



Constituents and Allies

Constituents

Those impacted by the policy that have the capacity to engage and support your campaign.

They are not opponents, but they may be people or organizations who could be persuaded to become supporters or allies.

Allies

Individuals and organizations with a vested self-interest in the issue and who can/will support your campaign, but not a coalition member.

What to Think About?

- Whose problem is it most directly?
- What do they gain if they win?
- Who else will be an ally on this issue?
- What power do they have over the decision maker (DM)?
- How are they organized, where can you find them?
- What risks are they taking?



Opponents

Those who will, or may, actively stand against your campaign and policy.

Opponents are not decision makers.

What to Think About?

- What will your victory cost them?
- What will they do/spend to oppose you?
- What power do they have over the decision maker?

Can you neutralize and/or divide opponents?



Examples of Constituents, Opponents, & Allies

	Constituents	Allies	Opponents
Definition	Those within the jurisdiction impacted and have the capacity to engage with your campaign and support your issue.	Individuals/organizations with a vested interest in the issue and who can/will support your campaign.	Those who will, or may, actively stand against your campaign and policy. Opponents are <u>not</u> DMs.
Example	<ul style="list-style-type: none"> • Who: Local University Student • Role: President of a student union leadership group. • Interest: Personally affected, common interest, expand their network, leadership development use and value their existing skills. • Impact: Will write letters of support, testify at City Council meetings, engage their membership. • Contact Information: [email, phone] 	<ul style="list-style-type: none"> • Who: Employee for non-profit public health organization. • Role: Field Advocacy Manager • Impact: Able to write letters of support, testify at City Council meetings, and provide technical assistance; can lobby DMs. • Contact Information: [email, phone] 	<ul style="list-style-type: none"> • Who: Director of a pro-vaping organization. • Role: Director, leadership • Impact: Able to lobby DMs using cultural/religious traditional argument and well-funded opposition tactics. • Contact Information: [email, phone]



Decision Maker (DM)

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Organizational Considerations

Qualitative and quantitative! How many? Use Numbers.

Organizational/Coalition

What resources can you put in? Available media lists available resources (space, money, equipment, etc.)

How do you Build Your Coalition?**Constituency People Power**

Be specific. These are individuals and not institutions. List the name of the specific person in each organization.

Who cares about the issue: Constituents and Allies

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Public Education and Organization Building

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Decision Maker

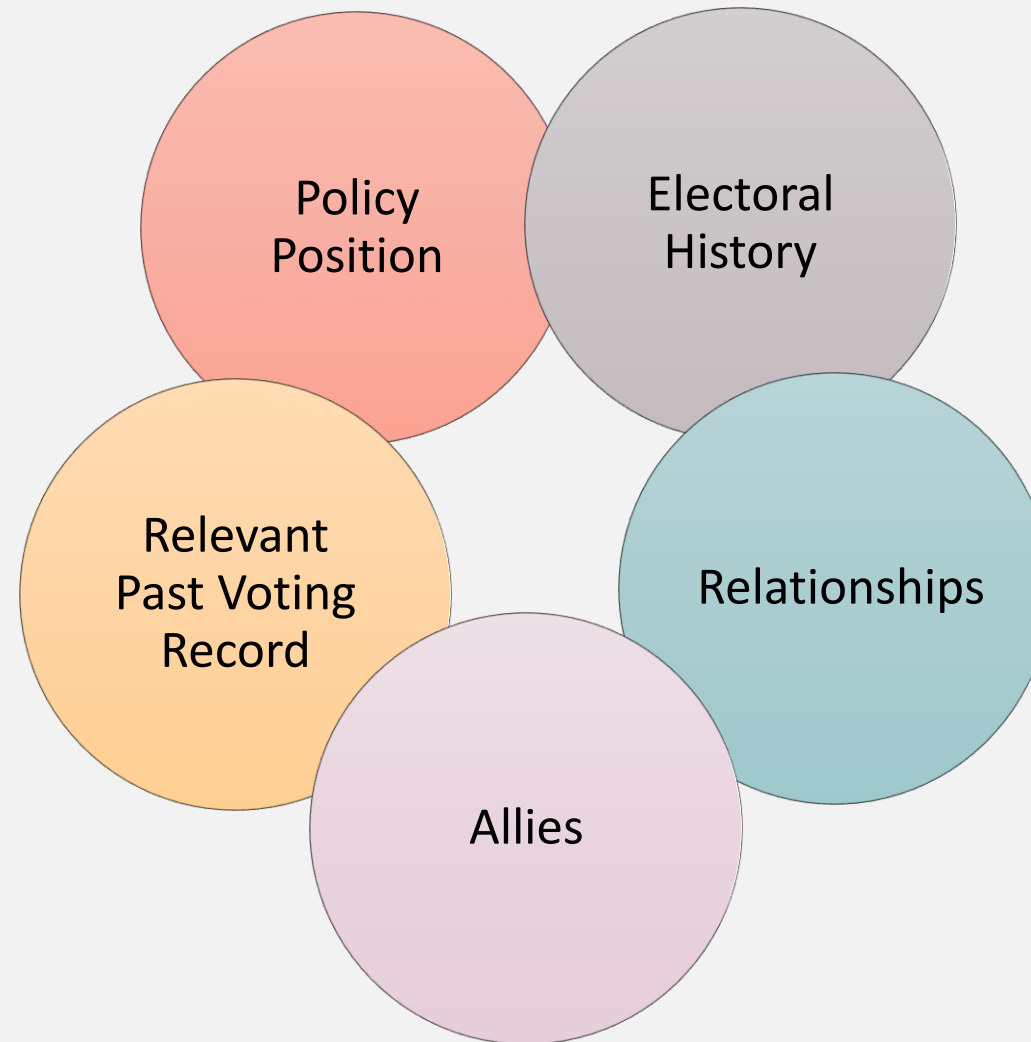
Decision Maker Matrix

This tool and process helps to map the personal and professional background and relevant interactions of the decision maker.

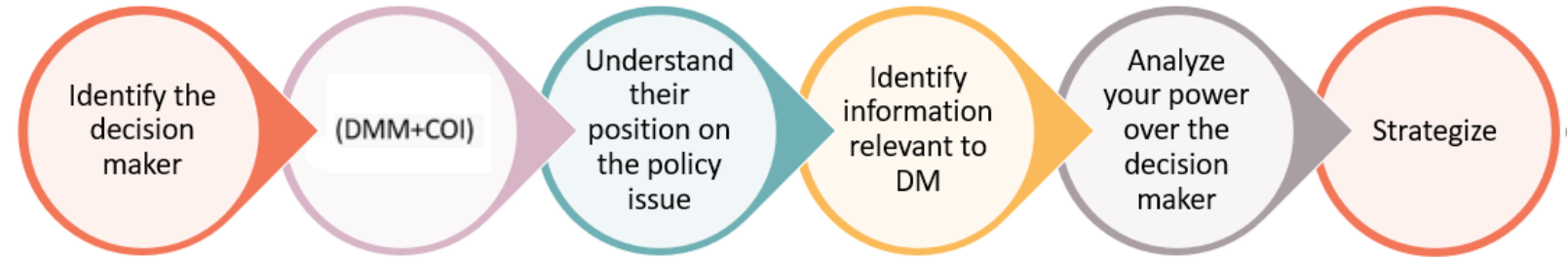
Decision Maker	Policy Position	Research & Notes	Allies & Affiliations
<p>List everyone on the City Council</p> <p>[Councilmember Name] District #</p>  <p>Contact Information councilmemberA@example.com (###) ###-#### ext ##</p> <p>Term Dates 03/2018 – 11/2022</p> <p>Running for another term? Yes</p> <p>Social Media Twitter handle Instagram handle Facebook link</p>	<p>Individual's likelihood of support.</p> <p>Yes: likely to support the issue</p> <p>No: likely to oppose the issue</p> <p>Undecided: if the individual is undecided</p>	<p>List all the information you have about the decision makers. Include things such as: vote record, family, occupation, interests, education, and campaign platform.</p> <p>Past Voting Record</p> <ul style="list-style-type: none"> Ord No 2008-15 prohibiting smoking in City parks: Support Resolution 2012-54, City Council resolution to foster a healthier City by encouraging residents, visitors, and business to eliminate secondhand smoke in outdoor areas: Support Ord No 2010-08 taxing sugary sweetened beverages: Support City Ord No 2013-18 permitting marijuana businesses in the: Oppose <p>Family Life</p> <ul style="list-style-type: none"> Spouse/Partner: Name, Graduated from a local University, Professor of Public Policy Three children who attend local elementary and middle school Both parents are involved with their local elementary PTA <p>Occupation</p> <ul style="list-style-type: none"> CA State Legislature - worked for former Assemblymember B (AD-##) Community Services Commissioner, Appointed position (2007–2009) <p>Interests</p> <ul style="list-style-type: none"> Enjoys walking and hiking, gardening, and has a menagerie of pets. Volunteers in various community-based organizations. Works with the Kiwanis Club at Monday Night Concerts in the Park. <p>Education Alumnae of local high school and local university with MA in Liberal Arts.</p> <p>Campaign Platform "The future of our City demands that we invest in our infrastructure and our citizens, and one of the ways we need to do that is by attracting vibrant new businesses that generate sales tax that fit the needs of our community."</p> <p>Other Yoga teacher at a local community college and an active volunteer in community and schools.</p>	<p>List all the groups, individuals, or clubs your D-M's are affiliated with. This will also help with recruitment strategy.</p> <p>Current Affiliations</p> <ul style="list-style-type: none"> Boys & Girls Club Kiwanis Club <p>Past Affiliations</p> <ul style="list-style-type: none"> Past-Chair of the Library Task Force Past-President of the Friends of the Public Library Past-Treasurer and Past-President of The Educational Foundation Founding member and Past-President of Community Active Living Society <p>Allies</p> <ul style="list-style-type: none"> Congresswoman Name County Supervisor Name Assemblymember Name Chair, Local Democratic/Republican Party



Building a Decision Maker Profile



Example of Decision Maker Analysis



	DM Example #1	DM Example #2	DM Example #3
DM	Council Member A <ul style="list-style-type: none"> Position: <u>Undecided</u> Elected by X% of voters Research: Utilize information obtained from your DMM & COI for this table. 	Council Member B <ul style="list-style-type: none"> Position: <u>Leaning Yes</u> Appointed by Mayor to vacant seat 	Mayor Pro-Tem <ul style="list-style-type: none"> Position: Solid <u>No</u>
Approach	<p>How much and what kind of power is needed to influence and gain the support of the undecided decision maker?</p> <p>Example: Councilmember A is affiliated with the Boys & Girls Club. Coalition could work to gain Boys & Girls as an ally to influence Councilmember A and gain their support.</p>	<p>Coalition must solidify the DM's support and <i>get a direct commitment from them</i>.</p> <ul style="list-style-type: none"> Critical that you use your power to move them into the fully supportive position. Once the DM commits to supporting the policy, you need to confirm it. Watch for opponents working to flip the DM back to a less defined position. 	<p>Rarely should you use time and effort on a DM that is a known opponent of the policy.</p>



Tactics and Tasks

Tactics are activities that directly engage a DM.

Tasks are activities that support achieving a tactic. These are how you will show power to the DM so they will say yes to the goals.

Show Power Directly to the DM

- Letter/email writing
- Petitions
- Phone banking
- Social media spotlight
- 1 on 1 meetings with DM
- Media events
- Rallies

Public Education and Organization Building

- Media events, etc.
- Social media messages
- Rallies/Banners
- Townhall meetings

Organizational Considerations

Qualitative and quantitative! How many? Use Numbers.

Organizational/Coalition

What resources can you put in? What resources are available? Media lists? What resources are available? Resources (space, technology, equipment, etc.)

How do you Build Your Organization?

What are the resources of your organization? What are the resources of your organization? What are the resources of your organization?

Constituency People Power

Be specific. These are individuals and not institutions. List the name of the specific person in each organization.

Who cares about the issue: Constituents and Allies

- Whose problem is it most directly?
- What do they gain if they win?
- Who else will be an ally on this issue?
- What power do they have over the decision maker (DM)?
- How are they organized, where can you find them?
- What risks are they taking?

Decision Maker (DM)

The person who has the power to give you what you want! DMs are always individuals, not institutions.

Decision Makers

- Elected, appointed, or a corporate power?
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Tactics and Tasks

Tasks and Tactics



Tasks

- ☐ Assist and support your tactics
- ☐ The to-dos/errands



Tactics

- ☐ Aimed at a specific DM
- ☐ A demonstration of your coalition's strength, power, and breadth
- ☐ Realistic and related to your organizational considerations





Tactics Examples



Media events



Earned media
(op-eds, LTEs)



Petitions



Letter writing
campaigns



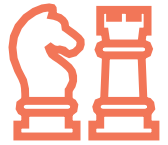
Rallies



Testimony at a
hearing



Tactics and Tasks Example



Tactic: Conduct one-on-one educational meeting with City Councilmember.



Task List

- ☐ Arrange a meeting with the Councilmember
- ☐ Develop and/or find a Fact Sheet for DM
- ☐ Hold a preparation meeting with coalition members
- ☐ Collect letters of support to present to Councilmember
- ☐ Develop Thank You letter





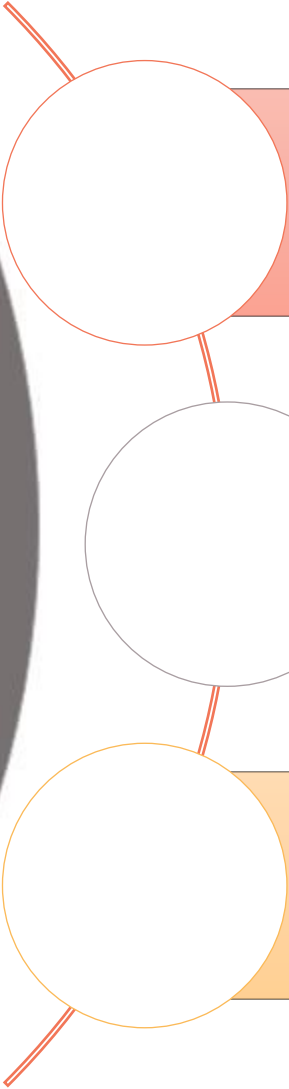
Tropical Town MASC Exercise

Please go to organizingtoendtobacco.org/events/ for Tropical Town Scenario and example completed MASC.



Questions & Answers

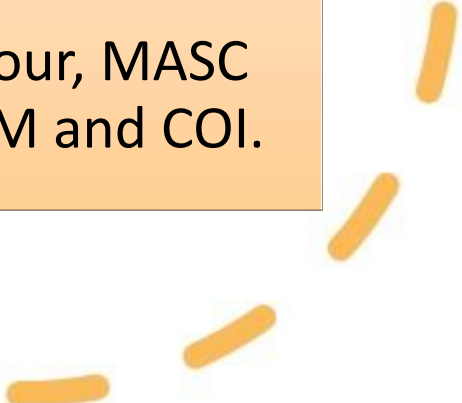
Conclusion



Utilize the MASC as a strategy development and strategic planning tool.

The MASC allows your coalition to systematically realize your coalition's power and helps achieve your goals.

In order to effectively complete your, MASC you must first complete your DMM and COI.



Upcoming Events

Subsequent webinars in this series require additional registration. Please see schedule below. Registration links can be found in Partners and OTIS.*

Topic: Key Tools: Decision Maker Matrix and Circles of Influence

When: 12/03/2020 @ 1:00 PM

If you do not have access please email
organizingtoendtobacco@heart.org

Please take the Webinar Feedback Survey for today's presentation! Link is in chat box.

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