LOCAL UNION ACTIVIST PLANS

ESTIMATED TIME

1 hour, 20 minutes

MATERIALS CHECKLIST

- Flip charts
- Markers
- Local Union Activist Plans
- Side-by-Side Mentorship Calendar
- PAF Cards
- Timekeeping cards

TO BE PREPPEP

LOCAL UNION ACTIVIST PLANS

Print and distribute enough Local Union Activist Plans for all of the participants.

FACILITATOR’S SCHEDULE/CALENDAR

The facilitator should have a pretty clear calendar for the next 3 weeks to accommodate the side-by-side mentorship with the participant. The facilitator will individually schedule to accompany each participant with organizing support for their activism at their worksite. The dates, times, and locations agreed to, need to go on the facilitator’s schedule.

TIMEKEEPING

Enlist a co-facilitator to use the timekeeping cards to keep time for the full module as outlined in the Instructor’s Manual. Staying on time is essential for the success of the full training!
FLIP CHARTS

TOTAL GROUP COMMITMENTS

- Create a flip chart that contains the following categories:

1. # of Personal Volunteer Shifts
2. # of Volunteers Recruited
3. # of PAF Cards Collected
4. # Total Yearly PAF Revenue Projected to be Collected
5. # of New Member Sign-Up Cards
6. # of Total New Yearly PAF Revenue Collected by the Group:
   - Collect the numbers of the group’s personal Political Action Fund increases and new sign-ups from the cards signed in the room. Tally the numbers of the new yearly PAF revenue (Add up the monthly value of all cards, typically whatever box someone checks on the card x 2 x 12.).
7. The full group’s total commitments to the aforementioned metrics will be added up after each participant’s full Local Union Activist Plan is completed. After adding up the numbers, all of the numbers should be flip-charted and revealed to the class at once after a drum roll. This presentation of numbers is a celebration of the great commitments and the work that will be completed moving forward!

DATES TO LOCK IN

- Create a flip chart containing the information for the first group call and the Class Session:

1. 1st group call: date of call, conference call dial-in number, access code
2. **Saturday, Class Session**: date, time.

   ➔ Have a discussion with the full activist class and decide on a date and time that works well for the entire activist group to join the first group call. Creating a day that consistently works well for everyone each week is the best option. Also, solidify a day that all of the participants can attend the Class Session (8:00 a.m. - 6:30 p.m., no early dismissal). The Class Session should be held on a Saturday, but can be held on any day of the week (with lost time) only if absolutely necessary to accommodate the schedules of the participants.

**CONFERENCE CALL LINE**

Reserve the National Political Field Conference Line by contacting National Training Staff ([politicaltrainings@cwapolitical.org](mailto:politicaltrainings@cwapolitical.org)) or directly reserving your spot on this calendar:

NUMBER: 888-278-0296 | ACCESS CODE: 2309745 | HOST CODE: 7154

**PARTICIPANT’S GUIDE PAGE REFERENCES**

CWA Political Action Section: Pg. 159
Local Union Activist Plan: Pg. 198

**OBJECTIVES**

➔ Commit to actionable goals to enhance personal organizing ability and to build power within the union.

➔ Schedule important aspects of the follow-up sessions.

➔ Brainstorm political engagement and outreach.

**MODULE OUTLINE**

<table>
<thead>
<tr>
<th>Total</th>
<th>1 hour, 20 minutes</th>
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</thead>
<tbody>
<tr>
<td>Facilitator - Participants PAF Ask</td>
<td>5 minutes</td>
</tr>
<tr>
<td>Plan Overview</td>
<td>10 minutes</td>
</tr>
<tr>
<td>Plan Competition</td>
<td>40 minutes</td>
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</tbody>
</table>
**DIRECTIONS**

**FACILITATOR - PARTICIPANTS PAF ASK 5 MINUTES**

**STEP 1. ASK THE PARTICIPANTS**

5 minutes

**DO:** Have a conversation with the participants. Put into context the state of our movement and our need for tangible dedication.

**ASK** the following questions to the full group:

- “Do you all believe in organizing?”
- “Do you believe in collective work and responsibility?”
- “Do you all believe in this movement?”

**SAY:** “We cannot ask activists to do anything that we are not doing ourselves. We are role models, we are examples, and we are testaments to what change looks like when we answer its call.

**ASK:** “Will you all continue in the fight for the Political Action Fund at a rate of $40.00 a month?”

**PLAN OVERVIEW 15 MINUTES**

**STEP 1. FULL PLAN OVERVIEW**

15 minutes

**DO:** Ensure that all participants have a Local Union Activist Plan.

**SAY:** “Please do not write on the plans. First we will review the full plan front to back to make sure you are all clear about what is being asked, and then you can all start filling out the document.”

**SAY:** “The Local Union Activist Plan is an organizing tool that we will use to map out our political engagement for the next 6 weeks (+). This document contains various questions about commitments that you will make and how you will execute those
commitments. After completing this document, it should be your roadmap for achievement and your promise to yourself and your activist group.”

**DO:** Review all of pages front and back, reading all of the content.

**ASK:** “Are there any questions?” Answer all questions and make sure the participants are clear about the form.

## PLAN COMPLETION

**40 MINUTES**

### STEP 1. GROUP BREAKOUTS (IF APPLICABLE)

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**KNOW:** Mapping out co-workers and organizing opportunities at the worksite and abroad is a large task; having support in the brainstorming process can improve the plans of the activists.

**DO:** Break the participants up by worksite, local, district, region, organization, etc. They do not have to be in a group to complete their plans, but if groups are possible, this could help with the planning and execution of organizing. Even when working in a group, all participants must complete their own individual Local Activist Plans.

### STEP 2. COMPLETE PLANS

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**DO:** Have participants complete their Local Union Activist Plans.

**DO:** All facilitators should be walking around the room, checking in on groups and assisting participants in all ways possible.

**SAY:** “Each group, pick two people to practice a PAF conversation in front of the room.” Select one person to be the organizer and one person to be the member.

**SAY:** “When reporting back, you are acting as if you have connected, engaged, and created a vision and then you make a concrete ask for the member to sign up to the Political Action Fund. The roleplay starts
with the member’s response to your ask which is the
text on the PAF Common Responses Card.”

DO: As participants are completing their plans, walk
around to every participant and schedule a side-by-
side mentorship session with them. Use your
electronic calendar or your paper calendar tool to
keep accurate and clear records of your side-by-side
schedule.

COMPLETION OF NUMBER TALLY/
SCHEDULING
25 MINUTES

STEP 1. COLLECT NUMBERS

10 minutes

Flip Chart: Use the Total Group Commitments flip
chart.

DO: Start walking around the room to collect numbers
to tally up the total group commitments for the
following sections:
   1. # of Personal Volunteer Shifts
   2. # of Volunteers Recruited
   3. # of PAF Cards Collected
   4. Total Yearly PAF Revenue Projected to be
      Collected
   5. # of New Member Sign-Up Cards

DO: Collect the numbers of the group’s personal
Political Action Fund increases and new sign-ups
from the cards signed in the room. Tally the numbers
of the new yearly PAF revenue (Add up the monthly
value of all cards, typically whatever box someone
checks on the card x 2 x 12.).

ASK: After all of the numbers are collected and tallied,
ask for a drum roll from the participants and reveal
all of the collective group commitments.

SAY: “These numbers are amazing to see! One thing I
want you to know is that groups always far surpass
their pledged numbers! This presentation of numbers is a celebration of the great commitments and the work that will be completed moving forward!"

**STEP 2. CONTINUED SCHEDULING**

13 minutes

**DO:** Have a discussion with the full activist class and decide on a date and time that works well for the entire group to join the first group call. Creating a day that consistently works well for everyone each week is the best option. Also, solidify a day that all of the participants can attend the Class Session (8:00 a.m. - 6:30 p.m., no early dismissal). The Class Session should be held on a Saturday, but can be held on any day of the week (with lost time) only if absolutely necessary to accommodate the schedules of the participants.

**DO:** When scheduling, try to schedule according to the expressed format of the training; for example, schedule the first weekly group call the week following Day 2 of training, a Class Session 3 weeks from Day 2 of training (in the middle of the Follow-Up Process), and side-by-side mentorship as soon as possible (far before the class session).

**FLIP CHART:** Use the Dates to Lock In flip chart.

**DO:** Lead a large conversation with the entire activist group to secure dates for:

- **First weekly group call:** Have a discussion with the full activist class and decide on a date and time that works well for the entire activist group to join the first group call. Creating a day that consistently works well for everyone each week is the best option.

- **Class Session**

- **Side-by-Side mentorship**

**FLIP CHART:** On the Dates to Lock In flip chart, please be sure to display the conference call number and access code. As the dates are secured, tell participants to record the dates in the Dates to Lock In section of the Local Union Activist Plans.
**DO:** Make sure that all participants are clear about the commitments they made on their Local Union Activist Plans, as well as all of the dates they have locked in.

**DO:** Collect the Local Union Activist Plans from participants to make a copy. If it is possible to make a copy of all of the plans at the training facility and to return the plans to the participants before they leave Day 2 of training, that would be ideal. If copying is not available at the facility, be sure to let the participants know that their plans will be emailed to them the following day in their Email Follow-Up Packet.

**STEP 3. CLOSING**

2 minutes

**SAY:** “Making an activist plan is not easy, but you all have completed it and will not only be successful at meeting your individual and collective goals, but will far surpass your goals!”