

Where do I start?

Action Planning Guide

What is an action? An action is something that gets a reaction. Before you start planning your action, you must identify your **target** (who you want to move) and your desired **reaction** (what you want them to do).

Planning an Effective Action

In advance of the event:

When beginning to plan an action, ask, **“What is the reaction we want from the people in the room? Why are we holding this event? How does it move our strategy forward?”** Asking these questions will help you to determine who needs to be in the room and what needs to be a part of the action to make it successful.

- **THE WHO:**
 - Who do you WANT in the room (a member of congress, students, your rabbi, etc.)? Who are you trying to move, and why? You want to get specific - “Congress” is not a person. Who are the right people to be in the room to move this person?
 - Pick a target number for turnout – how many people do you want at the event for it to be successful? How many people should be in the room to be a real show of power to your target?
 - Who should know this is happening and help you promote it? (Your board, local newspapers, NFTY, the RAC, etc.)
- **TURNOUT:**
 - Personal outreach works best - **Facebook, posters, and mass-emails are ok, but ARE NOT TURNOUT.** They are reminders of the personal conversations you’ve already had with the folks you want to be in the room.
 - Make a plan: which member of the planning team is going to personally invite each of the people you’ve determined need to be there?
 - Follow up the day before or the day of personally and individually via a text message, Facebook message or phone call.

TIMELINE:

- As a team, make a timeline for the action: When do things need to get done? Remember to think about outreach, room reservations or permits, funding, food, supplies, A/V, all the pieces. Assign someone to own each task.

On the day of the event:

• THE WHO:

- **Sign-in sheets are the hugely important. If you don't have a record of the event, it is as though it didn't happen.**
- During the event, notice who actually showed up. You have a very active role in looking out in the room for the people who are there. How are people responding? Who seems passionate? Who is asking good questions?

• THE ASK:

- One of the crucial elements of an action is the ask. You can make an ask of your attendees, your target or both. The ask:
 - Is not an announcement – it is a request of those in attendance. What do you want them to do? (Make phone calls, vote for a bill, write a letter, etc.)
 - Is personal – include a short story if possible, or relate the ask to something happening in the world or something that was said during the action
 - Presents a challenge – and articulates clearly the stakes of not acting on the ask
 - Needs to be concrete (do XYZ say ABC)

• ROLES:

- You should know which member of the planning team is doing what during the program. Make sure there's someone taking care of each piece – who distributes the sign-up sheets? Who makes the ask? Who takes photos and posts on social media?

After the Event:

• EVALUATE:

- You should immediately start thinking about what you accomplished and what you learned from your action. Set up a meetin
 - How did it go? Did you accomplish your goals? Did you get the turnout you wanted? What could you do better next time?

• WHO:

- Who do you need to follow up with, and how will you do it?
- Divide the follow up among your planning team. Assign each person specific tasks.