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:
  o 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?
  o 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?
  o Who should know this is happening and help you promote it? (Your board, local newspapers, NFTY, the RAC, etc.)

• TURNOUT:
  o 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.
  o 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?
  o 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 meeting
    - 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.