

How to Mobilize and Engage Independents in Your Network

IndependentVoting.org Election Reform Committee

Introduction

This guide was created in the fall of 2013 to capture the lessons learned from a collaboration of regional leaders with the National office of IndependentVoting.org to organize efforts in response to a unique opportunity – hearings of the President’s Commission on Election Administration (PCEA) in five U.S. cities over a four month period. As events unfolded, it became clear that the biggest success of the effort was demonstration of a new and powerful way of working together. Continued growth of the independent movement requires a “polycentric network” of local and regional leaders that initiate and coordinate activity directly with one another.

The PCEA “pilot” for inter-regional networking began with formation of the Election Reform committee with just three members. The name of the committee reflected a focus on broader goals than the narrow opportunity offered by the Commission’s charter. After the hearings, it became clear our work would not be completed upon conclusion of the PCEA chapter. Therefore, we adopted the following mission: *To motivate and equip a growing network of Independents to lead electoral reform activity that addresses the crisis of democracy in America.*

Below is a fairly detailed set of suggestions and examples that we hope will inspire more of the same in 2014 and beyond. It is the first word, not the last; hence, this guide should be updated and revised as other Independents share relevant experiences and lessons. We recognize that most reform efforts will not resemble the PCEA model; they will not have the high profile, national scope, dedicated Web site, etc. Most of our work occurs at the state level, requires great effort on our part to get anything going and even more to spread the word. A good example of this is Joe Pickering’s success in organizing several events in Maine that happened to coincide with the committee’s work on the PCEA. This guide includes a few of his contributions, and our hope is that more will follow from other sources – such as the regional conference Catana Barnes of Nevada will host in May 2014.

The guide is organized by stages of activity that apply to events, letter writing and other campaigns at any scale. The first section, Getting Started, deals with recognizing opportunities and developing strategies. The second, Organizing, is about getting traction by forming a team and planning activities. The third, Teamwork, deals with communication and management. The fourth, Representing Independents, is a reminder that our behavior is our message. Section five, Looking Forward, includes tips for making the most of the experience by recognizing contributions, achievements, and what was learned. The Conclusion addresses what may be the most important element – laying a foundation for future activity by developing and maintaining a vibrant network.

Getting Started

- a. Watch the press and Web sites, including local and national government sites, for notice of hearings, meetings, and opportunities for comment on issues that affect independent voters.

Create your own opportunities to educate others (including major party loyalists) on independents’ concerns. We need to know where they stand in order to develop our own

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strategies. Appeal to politicians' self-interest, which includes becoming involved in events where other politicians and media are present. Find a champion – someone already known in the community who is willing to work with an Independent – to host/sponsor/recruit officials.

PCEA

Gwen Mandell of the National office obtained a public notice of the PCEA kickoff hearing in Washington, DC just a couple of weeks before the event. She called on Steve Richardson of the Virginia Independent Voters Association, who works in DC, to attend.

Maine

Joe Pickering worked with a leader of the Bangor Public Library and the Bangor League of Women Voters to co-sponsor three events. The first was a panel discussion of Independent candidates, elected officials, and our President, Jackie Salit that exposed the audience to independent viewpoints and experiences. At the second event, party officials (Democrat, Republican, and Maine Green Independent) provided party members' perspectives on independent voters. A third event is scheduled in May 2014 in which independents and party leaders ask each other questions and field questions from the audience.

- b. Be flexible. Think of your event and involvement as a journey that will naturally include surprises and disappointments; establish realistic goals for giving voice to our message and strengthening our connections, not for an immediate outcome. Play the “long game.”

PCEA

We did not know how many Independents would attend or testify, who else would be there, whether the panel would comment, or if there would be any press coverage. We certainly did not anticipate last-minute changes to the schedule and the comment period. The uncertainty did not matter, though, because our primary objective was to show up and do our best – individually and as a group. Remembering that our cause is just and that we are not doing this for ourselves but for our nation kept us on an even-keel in the face of adversity. Another worthy goal was gaining experience and polishing our activist and communication skills.

We engaged the PCEA despite knowing they were bipartisan (the opposite of non-partisan) and that their charter deliberately limited the scope of their fact-finding to “non-controversial” aspects of elections. Indeed, the final report of the Commission, which was released with a brief statement by President Obama on January 22, made no mention of independents or any of the issues we raised in dominating testimony and written comments at each of the public hearings. Their chief concern is to ensure voters wait less than half an hour to cast their vote.

This cautionary tale is just Exhibit A for independents – the lesson being that we should not delude ourselves into expecting victory or judging our progress by traditional measures of “winning.” We may enjoy incremental success but resistance will increase as we do. It may seem like nothing has changed if major party candidates continue to win and exercise control. Remember that our goal is to improve the democratic process, evidence of which may require looking at the conversation instead of the ballot box.

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Organizing

- c. Recruit help; seek guidance from the national office and direct assistance from leaders in your state/regional network. The national and state organizations may provide names and contact information for activists who may be willing to help.

PCEA

President Jackie Salit invited members on the national call to contact Steve Richardson to join a new committee formed to coordinate our participation in the hearings and build connections within the independent movement. Catana Barnes (NV) and Rick Robol (OH) responded. Gwen Mandell contacted members in FL and then worked with Catana to recruit and support Coloradan independents to maintain momentum. Catana solicited testimony from other western region leaders and presented on their behalf at the Denver hearing. Meanwhile, using a list of members from the Midwest to the East Coast, the new committee recruited members to attend the Philadelphia and Cincinnati events.

Maine

Joe Pickering worked very closely with Gwen Mandell in the national office in planning the two events in Bangor, working with the hosts and panelists, and arranging for Jackie Salit to attend. Jackie's presence as a national figure was key to generating interest of panelists and the public – not to mention making a strong statement on behalf of Independents. Meeting with the Bangor Daily News Editorial Board was another important development as an Editorial resulted from the meeting. Plus, Jackie made a presentation to the Bangor Rotary Club on independent Voters from the National perspective.

- d. Assemble a small team to discuss and implement strategies and plans. “Brainstorming” sessions can be especially helpful in evaluating alternative courses of action, as well as the intended and unintended consequences and risks of each course of action.

PCEA

From its first meeting, the Committee Chairman worked to build a “team spirit” within the Committee, inviting discussion and encouraging all members of the Committee to use the Committee as a forum for developing bold new ideas. The Committee gave respect and deliberate consideration to all ideas presented. The Chairman emphasized the value of each idea and encouraged creative thinking by all members.

The Committee began considering its mission, incorporating guidance from Gwen Mandell, who, as advisor and representative of the National office, has been a valuable participant in committee calls and communication. Goals and strategies reflected what had been done in the past, opportunities presented by the PCEA, and the limitations created by the narrow mandate of the PCEA under the Executive Order that had established it. The Commission's hearing schedule provided clear dates and locations around which we began to organize a response. Activists in the first location (FL) were contacted for feedback that informed our plans with others “recruited” for testimony at the second location (CO), etc. We sought to involve as many Independents as possible and to pepper the Commission with our message –

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that they were missing the larger issues with access to the democratic process forest by concentrating on administrative minutiae.

- e. Offer team members guidance and provide frequent updates. Keep the national office well informed. Welcome feedback, questions, and ideas from all parties. It's helpful to copy all interested persons on key communications, news events and announcements related to your event. E-mail is a great tool for communication. Create a master "Contact List" with the names of all individuals who will be part of the team involved in your project.

PCEA

Because the events were just a few weeks apart, the committee scheduled conference calls biweekly and updated each other by email as needed between calls – usually at least twice per week. Each committee member also communicated with their local contacts at least once a week to verify participation, prepare testimonies, and plan logistics such as carpools and schedules. When the event was less than one week away, we relied more on email and combined contact lists to make sure everyone got the same information (such as meeting time and place, and whom to look for) as soon as possible. Gwen Mandell acted as a liaison with the national headquarters. These frequent calls facilitated exchange of information and also built confidence and familiarity of all team members with the lead contact and one another.

- f. Make sure that all communications are clear. If you are assigning tasks, make sure each team member understands his/her responsibilities. Pay close attention to details, e.g. time, exact location, and meeting method/location. Follow up to make sure that assigned tasks are on-track. Having a plan B is important. There are times when plan A cannot be carried out due to unforeseen circumstances.

Make it as easy as possible for team members to participate in activities. Try to figure out ways of sharing work and burdens so that no team member gets overloaded. Team leaders should look out for the well-being of all members. Be mindful that each member has obligations and situations that may affect their level of participation from time to time. It may be necessary to make adjustments in order to keep everyone engaged and involved.

PCEA

Exchanging drafts of testimonies reassured members that they were on track and that everyone was prepared. Having cell numbers was important when some got caught in traffic and even separated at lunchtime. Reassurance – of the commitment, the support, the goal, the plan, etc. – was very important to keep us all together, especially since many of us only knew one another by phone or email. Those who participated in later hearings were able to consider and build upon the experience and testimony of independents at earlier hearings. With each new hearing, we strived to build on and refine the themes and messages of the independents who had worked before us. Guidance and assistance of others who have had organizing experience (e.g., Gwen Mandell and Cynthia Carpathios) also helped tremendously. We selected a meeting time/location; shared information on parking and lunch options; planned for media contacts and designated a "group" photographer.

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- g. Aim for maximum participation because not everyone will be reached, willing, or available. Use leverage where possible to amplify your impact.

PCEA

We called everyone who might conceivably make the trip and asked everyone to testify. For example, for the Philadelphia hearing we called people from as far South as Virginia and as far North as Massachusetts. We had a list of about 50 and wound up with a dozen at the PA and OH events – which is very impressive considering they were on workdays and required hours of travel for most of us. Only a couple of those attending chose not to prepare individual statements.

All of the public comments were posted on the Commission’s Web site. Having an audience and knowing their work would be “for the record” provided an incentive; the testimonies and performances were excellent. Those able to attend represented others – including presentation of an open letter with 1100 signatures (organized by the National office) and five testimonies from regional leaders.

Teamwork

- h. Make sure that all team members understand how your team’s mission will help our movement achieve its long-term goals. Seize opportunities to build relationships among team members and whenever possible, try to spend face-to-face time with other independents.

PCEA

In our calls asking members to attend the hearings, we provided context such as the rarity of Presidential commissions on voter issues, the Web site and likely press attention, and our goal of making an impression in every venue by having not just one or two but a “delegation” of Independents presenting testimony. The Committee made sure to thank everyone for their support, whether or not they were able to attend the hearings. Each contact was seen as an opportunity not only to achieve the short-term objective of getting attendance at the hearings, but also to advance the long-term objective of expanding support for the independents movement. We carpoled not just to save money but to spend another few hours with fellow Independents.

- i. Take advantage of the diversity of independents. We come in all shapes, sizes, ages, colors and offer a variety of perspectives, experiences and talents. Discover your individual team members’ interests and help them contribute to the movement in a mutually beneficial endeavor. Understand that we are all volunteers; make your team’s activities intellectually interesting and fun for every team member. Encourage team members to speak up, participate, and be creative!

Diversity also applies to messaging. For example, if the activity includes letters or statements, invite personal contributions and encourage collaboration (e.g., by sharing drafts for comment). Optimize the balance between unity and “independence” by creating a common theme but avoiding unnecessary controls. Reinforce and draw strength from the national goal of improving the democratic process by applying principles to the specific issue

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at hand. Independents will be more invested and more effective by including personal knowledge and experience in their individual contributions.

PCEA

For each hearing, the Committee contacted independents from a number of states in the surrounding region, largely to present the Commission with state-specific examples but also to establish connections between independents in different state organizations. In conference calls, the host had each member introduce himself/herself, so that even before the hearing, we became familiar with one another as teachers, professionals, workers, veterans, members of the civil rights movements, etc. Guidance on preparing individual testimonies suggested an introduction that included state and national Independent affiliation and focus on opening up the process but encouraged members to be personal and creative with the rest. It worked beautifully! For example, in Philadelphia, Kevin Soubly spoke about millennials' natural independence and Dona Sauerburger described the map of "worms" that delineate Maryland's congressional districts. Having a breadth of different backgrounds and experiences added to our credibility, as well as to the ability of our audiences to identify with independents. At each hearing, we were united by common themes and messages.

Representing Independents

- j. Look for opportunities to network with other activists and identify common goals for reform. Be alert to the possibility of developing coalitions among other individuals and groups attending. Look for "teachable moments" where you can make new connections and explain the independents movement to others.

PCEA

The Philadelphia hearing led to a conversation between Nancy Ross of the National office, Jenn Bullock of Independent Pennsylvanians, and PA State Senator Anthony Williams about an open primaries bill. Also, a former county commissioner who attended that hearing contacted the National office six months later expressing interest in the EndPartisanship.org venture.

At the Cincinnati hearing, the audience seemed almost to "buzz" about the independents movement. Several approached independent speakers to acknowledge the justness of the independents' cause, to thank them for speaking out for the American people, and to express their gratitude for saying things about electoral reform that "needed to be said." Cynthia Carpathios of Independent Ohio reached out to the League of Women Voters (LWV), Common Cause, the ACLU and the Ohio Fair Elections Network (OFEN) to gauge interest in a joint press conference on fair election procedures. The press event did not happen, but that invitation led to ongoing conversations with the LWV and OFEN.

- k. Maintain professional relations with all officials and other participants – whether or not they appreciate your input. But don't be shy! Always remember that you represent Independents to everyone who reads your letters/testimony, hears you speak, or engages in a political conversation; their impression of you may be important. Be courteous and respectful, but also firm and sincere in expressing our basic principles as independents. When dealing with

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politicians and party members, be inclusive by recognizing that they, too, are concerned Americans. Present facts and our positions and let them choose to explain or defend the status quo after hearing what we have to say.

PCEA

Our testimonies for the PCEA were critical but constructive in stating clearly what we wanted done – in sharp contrast to the scope and direction of their published agenda. Despite the Commission’s transparent attempt to trip us up by changing the rules for public comments, we maintained our composure and presented our testimonies without protest, verbal or otherwise. Sarah Lyons and Catana Barnes met with several people in Denver and one of the contacts is now staying in touch with national. This definitely opens up the possibility of building coalitions. Remember that the independent movement rests on winning the hearts and minds of our fellow Americans. How you do things may be just as important as what you do. In each instance, we tried to appeal to the “better angels” and patriotism of the Commission members, and gave them an opportunity to do the right thing.

On occasion, however, assertiveness is needed. In the Cincinnati hearing, several independents were initially scheduled to speak for five minutes each. A few days before the meeting, this was reduced to three minutes. At the event, during a break just five minutes prior to the public presentation period, the Commission’s Co-Chairman Ginsberg advised Rick Robol that he had changed the order of presentations, with the presentations by independents to be made collectively – as a group – because the Commission had “already heard from the independents.” He did not specify the amount of time to be allocated to each presenter but Rick inferred that that the independent presenters might be allotted less than three minutes per speaker. When called forward, the independents stepped up together and presented each of their slightly abridged testimonies calmly, without rushing.

The success of these Independents in turning the last-minute change in the order and grouping of presentations by Co-Chairman Ginsberg from a surprise into an advantage underscored the importance of maintaining composure and respectfulness even in the face of seeming adversity.

1. Be aware of media presence at public events. Gather as much information as practicable about media interest and participation. Consider having a single spokesperson to handle media affairs. This may help avoid missteps and ensure a unified presentation of themes and messages. Try to anticipate possible questions that the media may ask. Ensure that your national and state leadership and media experts are kept informed of your team’s media planning and issues. As noted above, they can provide invaluable insights. If it is your event, make outreach to the media a major element to leverage the opportunity. Creating the event opens up opportunities for related discussions with different audiences.

PCEA

For the Denver hearing, Sarah Lyons set up radio interviews, wrote an op-ed, and sought out the press. She also dedicated one of her regular spokesperson training calls to helping us prepare for these hearings. Kevin Soubly was interviewed briefly by a reporter from the Philadelphia Examiner. Sharing these articles and recordings with the members

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demonstrated impact and energized others “on deck.” At the Cincinnati hearing, a single spokesman was designated with responsibility to respond to media inquiries and be prepared to present appropriate themes and messages. Catana Barnes also wrote a letter to the editor that was published in three papers in Nevada, one of which is very politically biased. Gwen Ballard, a Colorado independent, was interviewed by a local internet radio station at the end of the hearing. At the hearing in Cincinnati, Rick Robol periodically checked the tables allotted to media and asked around. Other participants in the Ohio delegation were aware of the importance of being sensitive to media attending the event.

Maine

Joe Pickering worked with his ally/sponsor from another organization to arrange television, radio, and newspaper interviews for Jackie Salit (op-eds to follow). Both panel discussions – one on independents and the other on the parties and their perspectives on independents and the independent voter were videotaped and posted on the IndependentVoting.org web site.

- m. Be serious and persistent to demonstrate respect and commitment. This is especially important if it is your event that others have agreed to support. In that case, it means keeping them informed and confirming understanding every step of the way.

PCEA

We did not hesitate to contact the staff in charge of the Commission’s Web site, agenda, and communications with questions about the schedule, order for public comments, posting of written testimonies, etc. In this case, the event was federally-funded and open to the public, so it was assumed *each of us* had the right to sign up and to be treated equally with anyone else not invited as an expert. Where other organizations such as the League of Women Voters sent a representative or counsel, we represented ourselves. Anyone paying attention would have been impressed by the depth of our organization and our thoughtful, personal contributions.

Looking Forward

- n. Be generous with praise and appreciation and celebrate successes. Make sure to recognize the importance of the behind-the-scenes work of, recruiting team members, coordinating activities, etc. Team members who help with these less visible tasks deserve recognition. Consider making a contribution to the Hub or sending a special newsletter at the completion of an activity so that recognition can be provided to everyone who participated. Keeping a good photographic record can be helpful; “A picture is worth a thousand words.”

PCEA

In every national conference call, President Jackie Salit showed us how to inspire one another by naming the people who deserved recognition for their efforts. We followed her lead by including everyone in every conversation or exchange and expressing sincere appreciation for the time members took away from their work and family obligations to promote our cause. There were a number of other individuals who played invaluable roles behind the scenes. Gwen Mandell and Nancy Ross liaised with national headquarters. Sarah

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Lyons assisted with media issues. State leaders, such as Cynthia Carpathios of Independent Ohio, gave advice and contacted state independents to enlist their participation and support.

- o. After each significant project or public event, try to have a written after-action-report. Try to document at least three things that you did well, and three things that could have been improved. Prepare a set of “lessons learned” from the event that may assist future independents in their work on our movement. Give all your team members an opportunity to contribute input to the report. Circulate your report at the state and national levels.

PCEA

The buzz within IndependentVoting.org emerging from the PCEA hearings led to repurposing of our committee to encourage and assist similar efforts. This report is meant to be the first installment in an ongoing documentation of practices proven to be effective at achieving our goals.

Conclusion

None of the above is possible without the basic ingredients of an effective network: people who share interests, knowledge, tasks, and understand the need to support and communicate with one another regularly. Do not wait until an idea captures your attention to contact other independents. Make those contacts now, and organize (monthly?) meetings or conference calls that offer opportunities to discuss members’ ideas – goals, observations, personal experiences, news, etc. It is not necessary to have a project to begin the conversation; they will come in time. Keep a list, add to it as you meet other Independents, and reach out to activists in other areas of your state and region or across the country if you hear of similar issues or events that might form the basis of a fruitful dialogue. Also, do not hesitate to ask National or committee members for referrals to other members or sources of information.

We want this guide to be as useful as possible, so please let us know what we can do to improve it. The idea isn’t to include everything we can think of but to make it a “starter kit” for new members of the network and a reference for those preparing to take on a project of sorts.

National office contacts:

Gwen Mandell	gmandell@cuip.org	212-609-2823
Sarah Lyons	slyons@cuip.org	212-962-1824

Election Reform committee contacts:

Steve Richardson	stevenrichardson@verizon.net	703-573-7949
Catana Barnes	ivonorg@gmail.com	775-354-3812
Rick Robol	rrobol@robollaw.com	614-737-3739
Joe Pickering	joepick@aol.com	207-947-3525
Saadiq Mohammed	gazellelion@gmail.com	501-208-8476