Trans-formation

Testing Deep Persuasion Canvassing to Reduce Prejudice Against Transgender People

The 2015 Report

on the collaboration between

SAVE and

The Leadership LAB of the Los Angeles LGBT Center

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Report by

The Leadership LAB team

Principal authors: Ella Barrett and Dave Fleischer

Co-authors: Steve Deline, Laura Gardiner, and Virginia Millacci

HOW TO USE THIS DOCUMENT

This manual describes our initial success using deep persuasion canvassing to reduce voters' anti-transgender prejudice through face-to-face conversations.

Deep canvassing is, fundamentally, a more effective way to accomplish non-partisan voter education with a lasting impact. We are excited that we have not only invented something new and promising but also are able to share it.

Deep canvassing is work that can and should happen both long before and long after any specific election. It changes hearts and minds, a greater goal than affecting the outcome of a specific ballot measure.

You can use this document at least three different ways.

First: If you decide that our approach has the potential to help your organization or campaign, this manual will help you replicate what we've done. If replication is your goal, we suggest you read the entire manual in the order written. We hope you will find it a clear and practical step-by-step guide.

Second: You can use the manual to apply any lesson we learned to public education you are already doing. Start with any chapter that is on point for you. For example, if you wish to increase the number of volunteers engaged in voter education campaigns, start on page 47. The Table of Contents lists all of the topics covered. The manual describes specific practices that worked well for us. We hope our experiences help you try out new approaches and develop new ideas of your own.

Third: This manual is also for readers who are simply curious about our voter persuasion work on transgender rights: what worked, what didn't, and what we learned. You may want to start on page 11, which summarizes our learning.

If this report leaves you with a desire for more information, please email Ella Barrett, our lead organizer on this project, at ebarrett@lalgbtcenter.org. We are grateful for having had the opportunity to collaborate with SAVE, South Florida's leading LGBT rights organization, and other organizations committed to fighting

for transgender justice; and are glad to be part of an ongoing conversation about how all of us can continue to improve at winning widespread public support for transgender people.

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Overview of Project

The Miami Project was a collaboration between the Leadership LAB of the Los Angeles LGBT Center; SAVE, the principal LGBT organization in Miami-Dade County, Florida; and two independent researchers, David Broockman and Joshua Kalla. The collaboration officially began January 1, 2015, and concluded on June 30, 2015.

Purpose

The purpose was for the LAB to help SAVE develop a voter treatment able to reduce anti-transgender prejudice among voters in Miami-Dade County and for Broockman and Kalla to measure whether and to what degree the LAB and SAVE succeeded.

The LAB

The LAB brought to this project its experience developing comparable voter treatments to reduce prejudice against gay and lesbian people and win increased support for same-sex marriage; and to reduce stigma against women who have had an abortion and increase support for safe and legal abortion. The LAB's model of deep canvassing is founded on its ability to recruit, motivate, train, support, and develop leadership among volunteers, and prepare those volunteers to engage conservative and conflicted voters in conversations that help those voters reconsider their prejudices.

SAVE

SAVE brought to this project longstanding experience advocating for LGBT rights in Miami-Dade County, including parts of the county that historically have been highly inhospitable to LGBT equality. Its tireless work organizing the LGBT community in South Florida was the foundation that made this project possible.

Note: We have endeavored to avoid speaking for SAVE and its staff in writing this report. As wildly successful as we feel our collaboration was, we expect and hope that they have their own wisdom to offer regarding the practices we describe here. We must note, however, that SAVE's leadership shouldered an extraordinarily important share of the hard work, sleepless nights, planning, thinking, and innovating it took to make this project happen. So anytime the word "we" is used as we describe the work accomplished in the following pages, it is intended to represent the efforts of both LAB and SAVE organizers alike.

Researchers

Broockman and Kalla brought their background in political science, statistics, the methodology of experiments, as well as remarkable problem-solving abilities. Their background prepared them to rigorously and independently measure whether and to what degree voters were affected by the conversations that LAB and SAVE volunteers initiated. Broockman is an assistant professor at the Stanford Graduate School of Business and a recent PhD recipient from University of California-Berkeley. Kalla is currently a PhD candidate at UC-Berkeley.

Funders

The Miami Project was made possible through the generous financial support of the Gill Foundation and the Evelyn and Walter Haas Jr. Fund.

SUMMARY:

WORK CONDUCTED BY THE LAB

AND LESSONS LEARNED

Quantitative Work Accomplished

Outcome 1: Transgender Prejudice Reduction Model A methodically tested, public education model that builds lasting support for transgender equal treatment; and a set of field-tested tools and best practices for any organization aiming to end gender identity and expression discrimination.

Canvasses Completed:

- 13 trans prejudice reduction canvasses in Miami; plus 2 in Los Angeles
  - 4 were advanced canvasses

- **637 completed conversations**, 195 partial conversations in Miami
  - Trans rights conversations with undecided/unsupportive voters: **164** (25.7% of all conversations)
  - Self-measurement of our impact on undecided and initially unsupportive voters: total trans rights conversations where the voter stated to the canvasser at the end of the **conversation that they had become more supportive: 98**
  - The 98 voters constitute **59.8%** of the unsupportive/undecided voters with whom we spoke
  - Average conversation length: 12 minutes

Materials Developed:

- 4 field-tested deep persuasion scripts
  - *English Scripts:* 1) for trans/gender non-conforming canvassers, and 2) for ally canvassers

- *Spanish Scripts:* 1) for trans/gender non-conforming canvassers, and 2) for ally canvassers

- 4 canvass trainings
  - General canvass training (geared to new volunteers)
  - Advanced storytelling training (for experienced canvassers)
  - "Early bird" advanced canvass training (allowing experienced canvassers more time in the field by giving them a shorter refresher training)
  - Peer-to-peer advanced canvass training (training for experienced canvassers to begin conducting skill development directly with one other, without a front-of-the-room trainer)
- 1 canvass coaches training (and supplemental checklist)

Outcome 2: Volunteer Base Building At least 75 to 100 trained South Florida volunteers adept at this method of canvassing, and the ability of SAVE Foundation to deploy a canvass that includes 15-30 canvassers every two to four weeks.

Miami Volunteer Canvassers:

- **170** volunteers completed 1 canvass (48 National volunteers)
  - 47 returned to canvass again 2 times or more
  - 28 returned 3 times or more
  - 18 returned at least 5 times

- 379 canvasser shifts filled

- 65 videographer shifts filled; 162 conversations on film

- 40 adept canvassers (measured by their having completed two canvasses and either attended an additional action or filled a leadership role that taught persuasion skills)

Skill Building Volunteer Actions:

- 11 one-on-one volunteer video viewing sessions
- 4 group volunteer video viewing sessions in Miami; 2 in Los Angeles
- 4 canvass leadership trainings
- 27 volunteer recruitment phone banks
- 1 volunteer safety think tank

Leadership Development:

- 40-50% of volunteers at each canvass were in a leadership role
- 56 volunteers (68% of total canvassers) were trained and filled a canvass leadership role

Materials Developed:

- 2 recruitment scripts:
  - 1 general recruitment, 1 transgender and GNC recruitment
- 1 class pitch script
- 1 confirmation call script
- 1 no-show call script

Looking Forward: SAVE plans to hold one deep persuasion, prejudice reduction canvass per month with 15-30 volunteers

Lessons Learned: Successes

1. **Deep persuasion canvassing reduces prejudice against transgender people.**

Based on both a) the rating change reported by voters to our canvassers during the conversations at the door, and b) outside independent assessment (more on the findings of Broockman and Kalla below), it is evident that the script and training developed by the LAB are working. Qualitatively, volunteers and staff returned from canvassing with stories of deep emotional connection with voters and felt as though they had planted seeds that will help voters think differently about transgender people.

2. **Replication of deep persuasion canvassing outside of Los Angeles is possible.**

The LAB found incredible success replicating its canvass and volunteer development work with SAVE in Miami. In addition to creating a persuasion model that reduces transgender prejudice, the LAB was able to help SAVE build a strong base of volunteer leaders. SAVE went from having one or two volunteers in leadership to having 56 volunteers who took on leadership roles or demonstrated leadership potential, and whose lives have been deeply impacted by this work. It is clear that, with the right resources and interest, the LAB approach can help an LGBT community organization vastly expand its volunteer leadership. In so doing, we believe LGBT organizations can greatly increase their ability to prevail in closely contested nondiscrimination fights moving forward.

3. **The LAB has learned, and can now teach, a set of best practices for recruiting and retaining a volunteer team that includes a significant number of transgender and gender non-conforming people.**

A LAB priority early on was learning how to build a campaign that is inclusive of and prioritizes the voices and experiences of transgender and gender non-conforming people. Through trial and error, the LAB team began to learn how to create a welcoming campaign culture that values the safety and

contributions of transgender and gender-nonconforming volunteers. The key to success was taking extra, intentional time to meet one-on-one and in groups with trans and gender-nonconforming canvassers, recognizing that it was part of our job to earn deeper trust in our work and in SAVE as an organization.

4. **The LAB's ability to improve depends upon our willingness to learn by doing and to continually self-evaluate.**

A typical (non-LAB) canvass has a stark division of labor. A few people do the "thinking" (writing the script, analyzing data), but usually avoid the "doing" (participating in the actual canvass, going out and talking with voters).

The LAB does (and in Miami, did) the opposite. Everyone from top to bottom in the LAB, staff and volunteers alike, was invited to join in the "thinking," and all of us were involved in the "doing." This is uncommon—some would argue unrealistic. In reality, this approach proved highly functional.

Early on, the LAB established a consistent culture of both formal and informal feedback and self-evaluation. Volunteers and staff at every level were encouraged to give specific feedback about scripts, training and logistics, whenever anything was on their mind. This culture enabled the LAB to increase the quality of the actions and ascend the learning curve at an exponentially faster rate.

5. **It is possible for the LAB to replicate our best results in volunteer leadership development in a new location on a tight timeline.**

The key to the LAB's quick success in building a team in Miami was our culture of leadership development. First, the LAB ensured that a core group of volunteers were not only showing up to canvass but were also taking part in the thinking and learning process. Second, we helped SAVE field organizers shift their perspective to view volunteers as colleagues they can trust and rely on rather than view only as one-time help.

Given that this was the LAB's first time replicating deep persuasion canvassing on this scale, we were initially unsure how quickly a solid leadership team could be built to support the tough work involved. But we achieved terrific results: using the techniques outlined in this document, in six months we developed 56 canvass leaders, 18 of whom canvassed five or more times. Many currently spend extra time in the office between canvasses. The volunteer leadership team improved markedly over time, engaging in high quality conversations with voters with greater and greater frequency and confidence. Having a returning group of leaders also created a much better environment for first-time volunteers who needed one-on-one attention and support to succeed.

Lessons Learned: Problems and Challenges

1. **Many voters initially overstate their support for trans-inclusive nondiscrimination laws.**

From the start of the canvassing in Miami, we encountered a pattern with voters that we now call "the nondiscrimination declaration." When we asked voters at the top of the conversation, "with the information that you have, would you vote in favor or against including transgender people in our nondiscrimination laws?" a large majority responded favorably, overstating their support. We learned this when we showed voters a video that included a clear depiction of transgender people along with opposition bathroom messaging; clarity led **13.9% to report less support**. We—and anyone seeking to gauge voter opinions on transgender equality—need to continue to learn how to get a more accurate initial read on where each voter stands.

2. **Replication works best when scaled up progressively. It is best when we focus first on quality work done by a small number of canvassers and only then, after quality is established, on increasing the number of canvassers.**

For the first kick-off replication canvass in January 2015, the LAB and SAVE implemented a full deep-persuasion canvass model at scale with 60+ volunteers, 25 leaders, and 14 videographers. Although the canvass was an overwhelming success, canvasser conversations did not reach the quality we strive for and the titanic effort required almost killed our team. In the future, we plan to replicate using a growth approach, focusing first on smaller test canvasses to build a team of talented persuasion canvassers; and then subsequently utilizing that team of leaders to support much larger influxes of brand-new canvassers.

3. Replication requires us to prioritize frequent and continual development of canvasser adeptness and team adeptness.

Our grant goal was to develop 75 to 100 adept volunteer canvassers. Although we trained 178 volunteer canvassers, we believe that, based on their skill level, only 40 are fully adept by our standards. We therefore did not hit this important goal. As a result, we learned that our canvassing method is best implemented when we prioritize not just building a base of volunteer leaders but continually creating opportunities to increase their persuasion skills. Filming our leaders' canvass conversations greatly enhanced our ability to coach them and, in turn, help them reach adeptness.

4. Attempting to simultaneously replicate our long-form canvass approach and create a brand new persuasion model greatly reduces our ability to coach new volunteers and organizers.

During the first four months of the replication effort, LAB staff spent an immense amount of time drafting and testing new scripts and trainings at every canvass. It took until April for the LAB to have enough capacity to implement video viewing and individual coaching with staff and volunteers to help them become adept. In the future, the LAB hopes to replicate models that have already been tested and vetted in the field, either by our local Los Angeles volunteer team or by an existing team of already-adept canvassers on the ground.

Summary of Initial Quantitative Results

from the Broockman and Kalla Study

Independent researchers David Broockman (assistant professor, Stanford Graduate School of Business) and Joshua Kalla (PhD candidate in political science at UC-Berkeley) measured the final six LAB/SAVE canvasses in Miami-Dade County conducted in June 2015.

They will submit their own detailed summary of findings separate from this report, sharing their statistical analysis of our impact and duration of impact on voters' views on transgender-inclusive nondiscrimination laws, as well as on voters' prejudice against transgender people overall.

As we write this report, however, Broockman & Kalla have shared preliminary, confidential findings with us. The data are highly encouraging (though not to be shared at this time beyond the readers of this report). We are having a large, double-digit, initial impact reducing anti-transgender prejudice. Three weeks after our conversations, the initial impact is persisting with little or no decay. The same is true six weeks after as well. By contrast, the overwhelming majority of voter treatments decay within three to five days.

Broockman & Kalla will be measuring duration of impact again at six months after our conversations with voters, so they can report the degree to which we are lastingly reducing prejudice.

Conclusion: What do we believe is possible?

The **goal of a deep persuasion canvass on transgender rights is to lastingly reduce prejudice against transgender people** and make it easier to win and retain support for transgender equality. Because of the strong results we achieved in Miami, we are hopeful that many organizations and campaigns will wish to replicate part or all of our approach, particularly when they begin doing voter persuasion well in advance of an election day, before they are under the time pressure that often develops in the last stage of a campaign.

In addition, the LAB believes deep canvassing may have the potential to reduce many forms of prejudice.

Over the next few years, we will test that idea by applying what we have learned from reducing anti-LGBT prejudice to other forms of prejudice, starting with trying to reduce the stigma against women who have had an abortion. If we succeed on abortion, we will seek out opportunities to try to reduce race-based prejudice.

Our ultimate goal is to gain insight into practical ways to reduce prejudice in lasting ways, creating a more just society, one less divided by prejudice.

The Three Building Blocks of a Deep Persuasion Canvass Program on Transgender Rights:

To build an effective program that reduces prejudice against transgender people, we recommend you develop:

1. **A deep persuasion conversation approach**
2. **A big team**
3. **A committed team of leaders**

How to accomplish each is outlined in detail below.

NUMBER ONE: A deep persuasion conversation approach

Core Skills for Deep Persuasion

We've learned that our deep persuasion method relies on our volunteers' ability to make a vulnerable, honest connection with voters.

We found that teaching the following three tools equips them for success.

1. Building Rapport

At the start of the Miami Project, it was clear that while voters were willing to talk about transgender people, our volunteers struggled. Our team was so new and nervous that they were having many incomplete conversations.

We discovered, however, that we could teach our volunteers to overcome this barrier by building trust and keeping voters engaged. We learned we had to place greater emphasis (in both training and execution) on a few key skills: confident and friendly communication; asking for the voter's point of view in an open way that made them comfortable being candid with us; listening to them as they shared their point of view; and focusing on their and our real, lived experiences rather than on their intellectual opinion or entrenched stance on the issue.

2. Focusing on Real Lived Experiences through listening and curiosity

We understood from our earlier canvassing on marriage equality and abortion that voters' real lived experience is gold. It takes voters out of a theoretical, judgmental place and into reality, where they are much more likely to empathize.

Our challenge was that many voters do not have specific real lived experience with transgender people. To supplement whatever minimal experience with transgender people they did have, we also dug into other real lived experiences that both felt relevant and carried emotional weight.

We found if voters did not have experience with transgender people, we could still make an impact. We were most successful when our script focused on voters' experiences with:

- lesbian, gay, bisexual, and gender non-conforming people they know and care about; and
- feeling judged for who they are based on race, religion, status, appearance, gender roles and family expectations.

3. Being Vulnerable and Sharing our Stories

We learned it is vital for our stories—about our real, lived experiences—to carry emotional weight as well. For transgender or gender non-conforming canvassers, stories about coming out and experiencing the judgment of others were particularly powerful.

For "cisgender" (non-transgender) canvassers it was important to share both the experiences of our transgender friends and loved ones and **our own personal** experiences of having been judged, even when that judgment did not directly relate to gender. Our willingness to show vulnerability helped us elicit a story of emotional significance from the voter. Our vulnerability signaled to the voter that it was safe to share something risky in turn - that we were not there to judge them.

THE CANVASS SCRIPT

How to create it

Components of the script that proved helpful

Between January and June, we tried out eleven different iterations of our canvassing script. Here are recommendations from that experience so you don't have to reinvent the wheel. Our canvass scripts can be found in Appendices 9-12. To see the full evolution of our canvassing scripts, including all 11 scripts created over the course of this project, please email Ella at ebarrett@lalgbtcenter.org.

- ☐ **Our best canvassing script has three parts**. Each requires time and attention during *every* canvass training: 1) the introduction, including an initial rating and a video clip, when canvassers stick most closely to the exact wording of the script; 2) defining "transgender" and eliciting the voters' experiences with LGBT people; and 3) a personal conversation about the experience of being judged, when the script serves as more of a guide.

- ☐ **The introduction** impacts the rest of the conversation because it is sets the tone and establishes rapport. Our demeanor, as well as the words on the script, determines how the voter views us and whether they will choose to talk to us. It is in this first section when we first communicate our curiosity and non-judgmental tone. We learned to make the introduction clear, honest, and especially short, so that each voter starts talking very early in the conversation.

- ☐ **The 0 - 10 scale** is a useful tool to get the voter talking and processing. It is imperfect—different voters interpret it in different ways, so one voter who says they're a "4" may be quite different from another voter who chooses the same number—but it invites voters to express even contradictory feelings or opinions in whatever way makes most sense to them. The neutral way we present the rating scale also gives us an early opportunity to establish a non-judgmental tone.

- ☐ **Defining and Humanizing Transgender People** is critical early in the conversation because many voters either don't understand who transgender people are or have an incorrect or incomplete understanding. Humanization was most successful when we showed a one-minute video of a transgender person telling their coming out story, along with that person's family discussing their journey to acceptance. Yet the video alone was not enough. After the video, we spent time clarifying what "transgender" meant and eliciting reactions from the voter in order to gauge their understanding.

- ☐ **The Personal Conversation** focuses on our and voters' real lived experience in two areas: 1) experiences with LGBT and gender non-conforming people; 2) experiences feeling judged. Each topic is introduced with open-ended questions for voters and a prompt for canvassers to share their own story.

- ☐ **The Final Rating** gives the voter the last word, so they can sum up for us what they got out of the conversation. It's also an opportunity for the voter to look back and identify whether a specific part of the conversation most impacted them, which both helps solidify the processing they've done and provides us with useful feedback. The final rating can also help us gauge whether we made an impact — it is one tool we use to track movement—but it is not a foolproof measurement. It is simply our best initial assessment, one we can tally that same day. We learned the final rating sometimes overstates our impact (if the voter is trying to be kind to us), but also sometimes understates it (if the canvasser has planted a seed and made an impact in a way not conveyed in the voter's immediate self-rating).

The script is a starting point, meant to serve canvassers of all experience levels. Over time, as canvassers become more comfortable with the script and with talking to voters in general, they will less often recite the script word-for-word and more often use it as a guide to dig into each voter's unique experiences.

For first-timer canvassers, using the script is challenging. Even though we give them opportunities to practice it during the training, they are often tempted to cling to it word-for-word, or ignore it entirely, during their conversations.

BUILDING AN ITERATIVE LEARNING CULTURE

How to ascend a learning curve quickly

Canvassing on transgender rights takes patience, humility and curiosity. You'll try many things that don't work. At least, that was true for us. Even now, after we canvassed for six months and invented and tried out eleven different versions of our canvassing script, including dozens of talking points, questions, and ideas, we *know* we can still improve—and we look forward to improving.

Our thinking evolved every time we went out to talk with voters and tried out new ideas. If you prepare for this likelihood and embrace it, you will enjoy your deep persuasion canvass.

The following six steps helped us get the most from the iterative learning process and gain insight as quickly as possible.

1. Benefit from others' expertise

From the beginning we were fortunate that the Movement Advancement Project (MAP) gave us access to their research about effective nondiscrimination messaging. We utilized some of this messaging, particularly in our earliest talking points about the bathroom argument. We also spoke with two field directors: Anne Garland Berry with the Fayetteville, Arkansas nondiscrimination campaign and Lindsay Clark from the Springfield, Massachusetts nondiscrimination campaign. It was incredibly helpful to learn from the opposition arguments they encountered on the ground.

2. Reevaluate and update the script

The script is an evolving document and experimental tool. It changed for almost every canvass, (although it's also fine if change happens less often, since it sometimes takes a couple of canvasses to assess the effectiveness of something

new). But don't be afraid to try new ideas. Try new questions. Try a different format. Each canvass debrief will reveal some parts of the script that are not working. Offer different language to help canvassers improve at building rapport, eliciting voters' stories, and sharing their own. We learned so many ways to improve that only 25% of our January script remained in the June version. We didn't have it all figured out up front. We are sure room for improvement remains.

3. Canvass with videographers; then watch the video footage with your team
Video viewing of real canvass conversations improved everyone's conversations with voters, particularly when we got together as a team to discuss what we were seeing. It quickly became clear where canvassers were excelling or struggling, which helped determine how we could focus and improve the training and script.

4. Best results come faster when the doers think, and the thinkers do
Having the most committed and capable people on the team canvass every time meant not only that great new ideas came up, but also that the potential of the new ideas was captured on video.

5. Debrief every action—every canvass; every phone bank
Getting feedback from all participants—from seasoned veterans to those canvassing for the first time—ensured each action became better than the last. Debriefs occurred at the end of every action, e.g. during the last 30-45 minutes of the canvass day. Additional debriefing was valuable throughout the following week, but there was no substitute for evaluation while the experience was fresh in everyone's minds. See appendix 22 for a sample debrief outline.

DEVELOPING CANVASSER ADEPTNESS:

How we improved from canvass to canvass

Importance of canvassers taking part in the thinking

What did it take to create an adept persuasion canvasser?

- ☐ ***Improve canvasser adeptness by filming and watching canvass conversations.*** Use these videos for canvass trainings, group and individual video viewing sessions, and one-on-one coaching (more on group video viewing sessions below).

- ☐ ***Adapt canvass trainings to match the experience level of the audience:*** When preparing for a general canvass, we made changes based on the experience level of those who were signed up to canvass and tailored the training to where improvements were needed most. Changes we made frequently included updates to the urgency; new video clips to help teach key points; and the amount of time spent training on a given skill.

  Newcomers most needed help building rapport and understanding the concept of real lived experience (distinguishing it from simply talking with voters about their opinions).

  Experienced canvassers most needed help improving and deepening the vulnerability they expressed when telling their personal stories.

  The smaller the canvass, the more elements of the training we chose to make interactive. Trainers in front of the whole room talked less; small group leaders took on more. This was especially helpful when we held an advanced training for our experienced canvassers.

- ☐ ***Improve adeptness through group video viewing sessions:*** Discussed in more detail on page 35, video viewing made use of the time between canvasses to improve canvassers' skills. Three types of video viewing sessions contributed to improving canvasser adeptness:

a. Group video viewing: Bringing together a group of experienced canvassers to view unedited canvass video footage improved individuals' skills and also influenced script and training improvements. These sessions were tailored to the topics staff or volunteers thought were most critical and led to discussions that fostered critical thinking about our own conversations and canvassing habits. These sessions are discussed in more detail on page 35.

b. Two types of one-on-one video viewing: Staff members either took time to view canvassers' own conversations with them side-by-side or, if that canvasser hadn't yet been filmed, they did a one-on-one analysis of a third party's conversation. These sessions were more time-intensive, since we met with one canvasser at a time; but they often had the largest impact, particularly when we had footage of the canvasser we were meeting with. We prioritized sending videographers to film canvassers with whom we were most interested in doing this type of coaching.

THE CANVASS TRAINING:

How to create the agenda

Excellence requires attention to a wide variety of details

Create large group, small group, and one-on-one segments of the training to give everyone individual attention and the chance to practice the most critical skills

- ☐ *Unusual canvassing requires unusual training*: Conventional canvass conversations are brief (two minutes or less); emphasize one-way message delivery (where the canvasser recites a script); and limit any back-and-forth to asking the voter's response to a leading question (e.g. can we count on you to vote?).

  By contrast, our voter persuasion and prejudice reduction conversations were much longer (twelve minutes on average); two-way message delivery (where both canvasser and voter enter into a reciprocal relationship and both do a lot of talking); and where back-and-forth is the hallmark of the conversation, with the canvasser asking questions that are open-ended instead of leading (e.g. tell me more about why you feel that way).

  As a result, our success depended on canvassers knowing how to listen; how to focus on each voter's real, lived experience; how to follow up by digging into whatever the voter says that seems to carry some emotional weight; how to ask open-ended questions; and how to do all of this in a non-judgmental way, so each voter is comfortable being candid with us.

  All of these are high-level skills. Great training can help almost every canvasser improve these skills, but it takes time. Hence our unusually thorough, participatory, and longer-than-usual training (75-90 minutes).

- ☐ *The more intense and thorough training added to volunteers' motivation:* The good news is that volunteers loved the training we offered, because it made clear that the activity itself was exciting, fun, meaningful and powerful. Our best volunteers want to be the best possible human being they can be when they're talking with voters, rather than being something more like a robot.

- ☐ *The training required more of us:* The challenge was that this kind of training demanded a lot of the training team. First, the trainers themselves had to be good at the skills they were teaching. Second, the training required a bigger-than-usual team of trainers, pod leaders and buddies, (the last two were experienced persuasion canvassers on the road to becoming more full-fledged trainers), because key parts of the training were best taught in small groups and one-on-one role play. Third, it was not enough for the training to teach mechanics and logistics: because we were actively seeking out opportunities to talk with voters who disagreed with us or who were conflicted, and because this was scarier than just seeking out voters who were already supporters, the training had to deal with fear. We had to provide the canvassers a clear picture not only of how to have these conversations, but also to show that these conversations were possible, that voters would really engage with us in this deeper and more vulnerable way.

- ☐ *Elements of the training that required unusual attention:* The following elements—which would be desirable parts of many canvasses—were, in this kind of canvass, essential.

    c. **Radical hospitality:** as volunteers arrived for the canvass training it was a priority for us to be extraordinarily welcoming, to put everyone at ease and affirm how much their participation was valued. This "radical hospitality" is a set of best practices that contributed importantly not only to volunteer morale but also to volunteer performance. See appendix 32 for a full explanation of best practices.

    d. **Well-organized sign-in**: every canvass under the sun does some kind of sign-in, but again we have developed best practices that are rarely seen. These practices insured we learned more about the volunteers and prepared them from the get-go with the appropriate materials and equipment they would need in the field. See appendix 13 for an example of our sign-in slips.

    e. **Starting on time**: essential both because we had a lot to cover and also because it set up the useful norm of always starting on time

    f. **The Welcome**: enthusiastic and acknowledging all the great allies and collaborators both in the room and outside it

g. **Urgency:** why the specific work we were doing together that day was important, how it specifically had the potential to make a difference, and how it related to a bigger picture

h. **Getting the voter conversation started**; the rating system; showing a 60-second video clip or ad; and the art and science of developing a rapport and connection with the voter

i. **The heart of the conversation**: for each canvasser, this meant sharing their own personal real, lived experience, and asking voters to share theirs. We used video of actual conversations to show and teach key points about how to do this well

j. **Thinking about our own stories**, and aiming for vulnerability so that voters could feel safe being honest and vulnerable with us in turn

k. **Key tips to elicit the full story of each voter**: patience, persistence, curiosity, not rushing, use of follow-up questions

l. **Use of small groups (pods)** and one-on-one role plays to help participants get the hang of each part of the conversation

m. **How to wrap up the conversation:** including how to get the voter to be honest with us about whether and how they had started thinking differently by the end of the conversation

n. **Logistics:** including use of all clipboard materials including the voter list and map; use of the video player; canvasser pair-up; and turf distribution (if not done during sign-in)

o. **Goals for the day** and tips to maximize time talking with voters

p. **Get-it-together time**: giving canvassers ten minutes to take care of themselves (put on sunscreen, get a snack and water bottle, go to the bathroom) before going out—and bounding it, so that that ten minutes did not stretch into even more time

q. **Informal efforts to notice any canvasser who needed extra help:** at every point in the process, having experienced organizers on the lookout for and checking in with any canvasser who seemed scared or had additional questions or needed help

THE CANVASS DEBRIEF:

Why do it?

And how to do it

For the LAB, the debrief is the final 30 to 45 minutes of the canvass day.

It is the most important part of the canvass because it's the time when volunteers and staff gather together to:

- reflect on, think about, and process the experience they have just had talking with voters;
- realize and share what they learned; and
- decide for themselves and as a team whether they had a meaningful experience that motivates them to come back and do it again.

A great debrief is therefore the difference between a canvass that is a one-shot oddity and a canvass that becomes an ongoing, "normal" activity that grows over time, creates a bona fide leadership team, and energizes and empowers your people, campaign and organization.

The irony: most canvasses done by most campaigns don't even do a group debrief, or they do it in a formulaic, rah-rah way. As a result, they miss their single best opportunity to have their volunteers

- think about both the good and bad of the day;
- realize, even if they have had a hard day—especially if they have had a hard day—that they are part of a team and the others have their back; and
- recognize not only their productivity as an individual but also the remarkable productivity of the team as a whole.

Just as importantly, the organizing staff loses out without a debrief. The debrief is their single best opportunity to notice:

- what's going wrong as well as what's going right with the canvass; and
- the strongest potential volunteer leaders, and also the people who are struggling.

Luckily, if you are reading this, there is no need for you to miss these opportunities. Instead, you can plan for and do a great debrief after every canvass. Here are best practices we've learned help make that happen.

Principles and ground rules

1. Everyone stays for the debrief. No one leaves early. To make this happen, make sure when recruiting to ask volunteers to commit to the full time they are needed from training through debrief. For us, that usually means Saturday 9:30 a.m. till 4 p.m.
2. Run the debrief mostly or entirely in a large group, with everyone present. Small groups are mostly unhelpful because they obscure that we are doing the canvass as a team activity. Canvassing as an individual or small group activity is almost unbearable, and almost always unsustainable. Canvassing as a team activity feels powerful and exciting, because it becomes clear in the debrief that, as a group, we had a real impact on the voters.
3. Run the debrief with a sense of enthusiasm, but not mindless enthusiasm. You need to engage fully your smartest, most capable people. To do that, your content and tone must convey that this is a dialogue among all canvass participants about the most important experiences they just had and the thinking that those experiences stimulated.
4. That means the debrief must be honest as well as positive.

   This may feel quite counter-intuitive.

But there must be room for canvassers to share their difficult parts of the day; their hard conversations with voters; and their own negative feelings and worst fears, including their own feelings of inadequacy, which honestly every single canvasser will feel at times.

Canvassers who had a tough day will never come back if we make them suffer in silence. They will feel like they were the only one who found the experience difficult—like they are individual failures—and they will fear that everyone else would view them critically or unkindly if their failure of the day was known.

When they get to speak up in the debrief, we have the opportunity to give them genuine support that will surprise and shock anyone who had a setback of any kind that day. See the instructions below on how a skilled moderator of the debrief can (and must) do this!

Yet, at the same time, it's vital that the negative not predominate; that people with positive experiences share their stories as well, particularly as the first story and the last story of the debrief. Without hearing about the positive, canvassers who had a tough day, as well as canvassers who had a so-so day, won't realize the breakthroughs that are possible with conservative and conflicted voters. And every canvasser in the room will be energized by realizing that, as a team, we are learning how these voters think; how we can talk with them; and that we can in fact help some of them become much less prejudiced.

The practical chronology:

How to prepare yourself to be a great debrief moderator

A. **What to do the week before the canvass**

1. Find a person to serve as debrief co-moderator with you

2. Rehearse with a buddy who can role play some of the likely comments that could come up in the debrief

B. What to do on the canvass day before the debrief

1. Be a full part of the canvass. That means be fully present in the entirety of the canvass training. Then go out canvassing. Live the experience that the rest of the canvass team is experiencing.

2. Shave a little time off the canvass shift and come back 15 minutes early. This will allow you and your co-moderator to greet the other canvassers as they return. Both of you should talk with as many as you can, one-on-one. Ask the canvassers how their day went; how are they feeling; what was their best voter conversation like; what was their worst; do they think they moved any voters; if so, what did they do that helped them move the voter. You will very likely discover that some people had a good day; some had a bad day; some have incredibly positive stories to tell; others have sad stories to tell. Remember who had particularly compelling experiences to relate; you may decide you want to call on them during the debrief.

C. Now it's time for the debrief

1. Start positive and with high energy.

E.g. "Welcome back! What a day! Please raise your hand if you talked with at least one voter today. Yes! Keep your hand up if you talked with 2 voters [pause]—3 voters [pause]—etc. Wow, some of us talked with ___ voters. Together we talked with a lot of people. That is great."

2. Open up the opportunity for people to tell stories about their day. There are several possible ways to begin, but always ask for a story of a success.

E.g. "We want to hear about what happened when you connected with a voter. Who here is a first-time canvasser with us, and would like to tell us about a great connection you made with a voter?"

After a story of a success, it's fine to ask in a more open-ended way about canvassers' experiences. E.g. "Any other first-timers who have a story, either about a connection you made with a voter or a challenge you had making a connection?"

Ask several types of canvassers to share stories, intentionally inviting to speak those who might have found canvassing difficult or intimidating, or who might have experienced prejudice at the door, e.g. first-timers, people of color, transgender people.

Throughout, moderators should invite volunteers to tell *a specific story*, rather than their more general opinion about their entire experience of the day or their summary view of all of the voters they spoke with. Specific stories are often emotionally alive, clear, and instructive; they provide raw material that helps everyone reflect. By contrast, more general pontification often is vague, over-broad and boring.

Moderators may also invite specific volunteers to tell a specific story that came up when the moderators were greeting everyone as they came back. This is especially good to do when a canvasser had a powerful story illuminating a key point about the power of this type of canvassing, and other stories volunteered during the debrief don't make that same point.

3. Moderators can (and *often* should) dig deeper by asking questions so that the story is told more fully, painting a picture of what happened.

   Moderators also can (and *sometimes* should) react to and reflect on a story immediately after it is told, especially if it feels like the moderator can create a powerful teachable moment. But moderators should use this opportunity sparingly, doing this perhaps once for every three stories told. Otherwise, the moderators' voices become the main voices heard in the debrief, and this is the opposite of what's most powerful.

4. Moderators can (and sometimes should) invite reactions/ suggestions/ advice from others in the room to a story just told, particularly if the story-teller asks explicitly what else they could have done in the situation they found themselves in. Again, this is best used sparingly.

5. Moderators' most important role during the story-telling comes when a volunteer tells a heart-breaking story, particularly if a voter or voters reacted to them with prejudice. Often the room will fall silent as a story like this is told. A moderator has to step up and first, *acknowledge* the canvasser's experience—then *pause*, to be sure the acknowledgement sunk in—*and* second, *affirm* by offering the most positive honest statement about how they, the moderator, feel hearing that story.

E.g. “I am so sorry you experienced that kind of prejudice. [pause] And I admire your courage being here today and taking a chance on meeting these voters and going way outside your comfort zone— you inspire me— I am so grateful you are part of the team here today.”

6. End the story-telling on a high note. Moderators, you will know it when you hear it because it will be emotional and inspirational and not phony. E.g., it could be a volunteer who really struggled who confesses how hard the day was for them, and that on the way back they thought they would never do this again—but now they realize that they want to come back and try it again. Or if could be a volunteer talking about how powerful it felt to move a voter.

7. After the story-telling, share the tally of the results for the day: the number of canvassers who went out; conversations they had; the number of those who at the end of the conversation were opposed to us, the number undecided, and the number supporting us; and the number of voters who moved over the course of the conversation. Encourage the crowd to react to each number and to whatever has transpired, good or bad.

8. End with the recommit, where the moderators briefly remind everyone why we’re doing this—the big picture meaning in what we’re doing; briefly remind everyone of the urgency of why we’re doing it right now; describe the most important next action we can all take, including the specific date, time and place; and ask people to volunteer for that next action by standing up or by a show of hands, and to call out their names so the moderators can write them down. Repeat for the second most important action. Then close with any announcements and a rousing thank you.

See appendix 22 for a debrief agenda.

VIDEO VIEWING:

Nothing else will speed up your team's learning as quickly

How to organize it

How to get the most out of it

Watching video footage of persuasion canvass conversations together, as a team of staff and volunteers, greatly accelerated our learning process and kept us in touch with what was really working or not in our conversations. At video viewing sessions we invited people to think critically about the biggest challenges and best opportunities in our conversations. These sessions improved the canvassing of those who participated and helped the team improve scripts, overall approaches and trainings.

Over the course of three months, our team spent 22 hours watching and discussing video together in separate one-to-two hour sessions between each canvass. Staff also spent time watching video individually in between group sessions. The 22 hours also included one-on-one video viewing and coaching time staff scheduled with individual canvass leaders. We had 11 of these one-on-one sessions overall.

How to run a great video viewing session:

- ☐ **Film actual conversations with voters.** Having even a few conversations on film can be a great starting point. Even better, as we filmed conversations over time, we gained insight from observing a wider range of canvassers and voters and also seeing many of us noticeably improve.

- ☐ **Track and label footage.** We carefully kept track to make sure it was easy to tell what date a conversation was filmed, who was in it, ratings from the conversation, and whether the voter signed a release for wider use.

- ☐ **Pre-screen the footage.** Our video viewing curators (staff or volunteers who prepared for video viewing sessions) watched a range of footage in advance to identify the most useful conversations or clips to show the larger group.

- ☐ **Decide on a focus.** The curators prioritized the video to show by considering the biggest challenges reported in one-on-one conversations with volunteers, the canvass debriefs and at staff evaluations of each canvass. This way the team could use video viewing to improve the parts of the canvass approach most in need. This focus also helped guide discussion after the group viewed each video; moderators could help steer the conversation and pull out specific takeaways to highlight for the group.

- ☐ **Make time for processing and discussion after each video.** We scheduled enough time to dig into the most useful parts of each video after watching. In general, watching unedited video of a full conversation was most helpful, but at times the curators were able to identify shorter segments of unedited video that helped the team focus on particularly successful or unsuccessful parts of the conversations. A typical large group video viewing session would include viewing two videos and last for two full hours. We would intentionally pick two different canvassers of varying identities and canvassing styles.

PLAYING VIDEO TO GET AN ACCURATE READ ON VOTERS

Show every voter a video clip that both shares a transgender person's story and introduces the opposition's most dangerous argument

We faced two challenges with many of the voters we spoke with in Miami. The first was that few of them had direct experience with a transgender person to draw from. The second was that many voters who initially appeared to be our supporters were, without realizing it, deeply vulnerable to our opposition's most damaging message: the idea that allowing transgender people to use the right bathroom creates a danger for women and children.

When first asked about nondiscrimination laws, the majority of voters we spoke to would give us the most socially acceptable response right off the bat: that they are firmly against discrimination toward anyone. We came to call this common response the "nondiscrimination declaration." Upon further probing, however, it was clear in many cases this declaration was only a knee-jerk, face-saving statement – that the voter's true feelings were more complicated and their support was not solid, but instead in grave danger of crumbling in the heat of a campaign.

Showing a particular kind of video near the start of our conversations was a key first step in helping each voter become more honest, both with us and themselves. Using local news coverage of the passage of Miami's nondiscrimination ordinance as raw material, we assembled a 60-second clip that first introduced a transgender person and their family and then gave voice to the bathroom concern by way of opposition spokespeople and citizen-on-the-street interviews.

Watching even this short clip featuring a transgender person and their loved ones instigated a wide variety of reactions from voters. The reaction created in the

voter at least some fragment of a real, lived experience with a transgender person. As a result, even when speaking with a voter who otherwise had no personal connection to a transgender person, we were always able to refer back to the person featured in the clip and ask the voter to share more about their feelings upon “meeting” them. Thanks to the video, there was always a personal foundation to build on.

In turn, seeing the opposition’s bathroom message delivered by seemingly credible, reasonable sounding messengers, just as they might see on the nightly news, surfaced transphobia that lay dormant in voters’ brains. The very act of our showing voters the opposition argument and inviting their honest response signaled they could take the risk of sharing whatever was on their mind, even if they suspected we might not like it. Once their fears were out in the open, we found we could tackle them head on and (often) disarm the opposition for good.

The tactic of starting each conversation with this short clip proved to be essential to our success, as well as straightforward to implement. Even though one might imagine this process will be awkward, our actual experience at the door is that almost all voters will watch a well-made, compelling, short video. What’s more, a variety of free or inexpensive and widely available tools and technologies have made the process of deploying such a video on smartphones and iPods easier than ever. Feel free to contact Steve Deline (at sdeline@lalgbtcenter.org) for further tips and advice on the technical side!

VIDEOS TO CREATE

We strongly recommend the creation of three types of video.

1. **Training video clips** are short, edited portions of actual canvass conversations shown during canvass trainings. These greatly improved our ability to train canvassers on conversation content: we could show canvassers what each part of a conversation looks like, so they could consider and digest each part before we moved on. The video also greatly reduced canvassers' fears.

2. **60-second video clips** explained the ordinance, since most voters were not familiar with it, as well as both sides of the issue, and were shown to voters at the door. The portion of the clip in favor of the law showed a transgender person (a transgender man in the English video and a young transgender girl in the Spanish video). Including a transgender person in the video clip was a helpful way to humanize transgender people and clarify what it means to be transgender, particularly when the voter did not know a transgender person personally. We also showed the opposition's most effective argument (bathrooms), in order to get an honest assessment of the voters' concerns.

3. **Full-length, unedited videos** of canvass conversations shown during video viewing sessions (discussed in the section above). These were often viewed in their entirety and helped our team more quickly ascend the learning curve, improve individuals' skills, and brainstorm new approaches to try out at the next canvass.

Below are specific examples of each type of video we created and used, as well as brief descriptions about why we found them useful. The Leadership LAB is happy to share upon request the videos listed below as well as others.

Type 1: Edited video clips used for canvass trainings

- ☐ **Introduction / Building Rapport**: Ella & Arti; *4 minutes*

  This is an unedited video clip of the first few minutes of a conversation. It models how to get into a conversation, be friendly, and follow the script. We typically paused this video shortly after the introduction to highlight these skills. It shows how to have a human conversation (not be a robot) and dig deeper (i.e. ask open-ended, follow-up questions). The voter, who starts at a 9 on the 0-10 scale and overrates himself as more supportive than he really is, which is typical with voters, moves backwards to a 6 after watching the video clip with the opposition's argument. This video helped ease new canvassers' fears about talking to voters, even when backward movement occurs. It also prepared volunteers to not be surprised when voters who initially seem supportive and make the "nondiscrimination declaration" turn out to harbor anti-transgender prejudice that requires our dismantling.

- ☐ **Personal Conversation / Trans Education, Curiosity and Listening**: Dave & Carter; *1 min 20 sec*

  This video clip models the canvasser being curious and patient with a voter who doesn't know anything about transgender people, which is very typical. He models how to convey empathy and genuine curiosity not only with his words but also with his tone, body language and choice of follow-up questions, (going off the last thing the voter said rather than mechanically going down the list of possible questions on the script). He also makes it very clear what it means to be transgender, so he and the voter are on the same page. He doesn't rush past this, and asks for reactions in a nonjudgmental way.

- ☐ **Personal Conversation/ Digging deeper for experience with emotional weight**: Laura & Brooke; *2 min 20 sec*

  The canvasser models how to elicit and help the voter process their real lived experience. Even when the voter's experience doesn't seem to be completely applicable to the issue at hand, the fact that it has emotional weight and is related to judgment helps us reach the ultimate goal. The canvasser's kindness

and curiosity towards the voter clearly helps the voter feel comfortable opening up and being vulnerable, as she shares a story about her son, race-based prejudice, and the way we can be poorly served by stereotypical assumptions.

☐ **Addressing Opposition Argument**: Dave & Carter; *3 ½ min*

This video clip models how a canvasser can help a voter think through their concerns about a transgender person using a bathroom. The canvasser is patient, non-judgmental, and asks open-ended questions for the voter to think through. This ultimately leads to the voter realizing their concerns are unfounded and not based in reality.

☐ **Sharing Our Own Personal Stories**:

1. **Charo & Sonia** *1 min* – Charo shares her own definition and experience being gender non-conforming in a brief but detailed and engaging way. She doesn't make any assumptions, and takes the time to explain what the term means to her, creating a vulnerable space in which the voter feels comfortable reciprocating with her own experience.

2. **Justine & Joyce;** *1 ½ min* – Justine shares her experience as a transgender woman who recently began transitioning. This story paints a specific picture of who a transgender person is, in her own words, and in a way the voter can relate to. Showing the voter how vulnerable we are willing to be up front is the best thing we can do to elicit a personal experience with emotional weight from the voter.

3. **Laura & Andres;** *50 sec* – Laura models how to share a story as an ally who has a transgender or gender non-conforming loved one. Her story touches upon her friend being transgender, but just as importantly shows how an ally can paint a picture of their loved one outside of their gender identity, and still be vulnerable with a voter.

Type 2: 60-second video clips to show voters at the door – English & Spanish

The English-language 60-second video clip shown at the door included the experience of a transgender man, Rodrigo, and his mother (a well-known Congresswoman from Miami). It also included news footage featuring the opposition's messaging about the law, specifically citing the "bathroom" argument, to more accurately gauge whether or not this was a concern for the voter.

The Spanish video clip included similar footage around the opposition argument, and shared the experience of a transgender girl, Manuela, and her parents.

We showed one of the above video clip to voters (showing the one in the language which each voter preferred) at the beginning of each conversation, just after their initial self-rating. These video clips were especially useful in conversations when the voter did not have personal experience with a transgender person, as the canvasser could refer to Rodrigo or Manuela's experience.

Type 3: Full, unedited, conversations for video viewing sessions

1. **Dave & Carter** (5-5-7); *17 minutes*

Dave does a great job with a voter who many canvassers would be tempted not to engage with for too long, because the voter speaks slowly, pauses frequently, and is somewhat reluctant to verbalize his thoughts and feelings. The canvasser is patient and extremely curious, letting the voter take his time. Also a great example of a voter who seems supportive up front but has a negative reaction to the bathrooms argument in the video clip, which Dave does a great job addressing later in the conversation. Specifically, by asking questions and listening, and not making an argument, he helps the voter talk through his concerns to the point where he realizes they're not realistic.

2. **Sukaina & Samantha** (6-6-7); *19 minutes*

This is a great video to show a canvasser who does many things well but still has room for improvement, and is useful for coaching. Sukaina does a great job with the survey, and has a friendly and non-judgmental tone that helps set the voter increasingly at ease. Sukaina's main area for improvement is the need to dig deeper with the voter and spend more time asking about her experiences with the use of more follow-up questions.

3. **Laura & Brooke** (8-8-10); *18 minutes*

This conversation models how to be curious with a soft supporter who first offers multiple stories that don't have much emotional weight. The canvasser perseveres to get to a more impactful and meaningful experience. This is also the kind of supporter we need to retain. Her support is clearly there, but is weak; by going through the script, she was able to take the time to realize why she was truly supportive. This conversation also shows how eliciting (and sharing) stories around judgment, even when not about transgender people, can be helpful.

BE STRATEGIC ABOUT "TURF" (the neighborhoods, households, and voters you choose to canvass)

We set canvassers up for success by ensuring the neighborhoods and households we canvassed—our turf—met two criteria:

1) It was comfortably walk-able, with easy-to-access doors and numerous doors in close proximity

2) It was made up of a healthy number, at least 55% or more, usually 65% or more, of undecided and unsupportive voters who needed persuading.

How to locate great turf: (sample turf map and walk list located in appendix 38.)

☐ **Seek areas where at least 55% of voters voted against LGBT rights in the past.** Data on past ballot measures is typically available on Secretary of State or County Clerk websites. If there is no recent LGBT issue vote to reference, results from other social justice ballot initiatives may suffice. Did 55% plus vote against abortion access? In favor of Voter ID? If necessary, competitive candidate election results, i.e. "purple" neighborhoods, can substitute as a starting point.

☐ **Use voter list targeting carefully**
If a targeting model is available that aims to rate the supportiveness of the voters on your list using an algorithm—without actual two-way voter contact—be aware of its limitations. Even very sophisticated models are often both over-inclusive (they include as persuadable some voters who are either already supportive or unmovably opposed to us) and under-inclusive (they leave out voters who in fact could go either way, often mistakenly overestimating their support for our position). We found a targeting model to be advantageous when comparing relative support levels between entire neighborhoods but more error-prone when used to filter our canvass walk lists (according to which individual voters it predicted would be worth our time).

For new volunteers—who are facing the near-universal anxiety—a heavily targeted list also got in the way of success. When doors to knock were widely dispersed because many voters had been culled from the voter list by the targeting, or when the only voters left to canvass were the most challenging, it took much longer than usual for new volunteers to experience their first exciting,

unexpected connection with a voter and begin to build confidence. As a result, both the speed of the volunteer team's ascent up the learning curve and recommit rates among brand-new volunteers suffered.

If targeting is part of your strategy **we recommend giving canvassers dense, unfiltered turf as you build a new program's momentum and save targeted canvass lists for your most confident and advanced canvassers down the road**. We also recommend that you continually evaluate the accuracy of any targeting model as your canvass begins to be able to offer a reality check.

☐ **Examine promising regions to locate additional walk-able, residential neighborhoods**

The ideal terrain is single-family homes set close together on non-thoroughfare streets. Avoid apartment buildings whenever possible, unless they are unlocked or easily accessible. Avoid areas where only a few single-family homes are wedged in between commercial areas, abandoned buildings, or inaccessible apartments. Use Google Maps and/or the turf-cutting tool in the VAN to assess this quickly from a birds-eye view.

☐ **Digitally scout your top neighborhood candidates at eye level**

Use Google Street View to explore the streets on each turf, looking for barriers that would block canvassers. Obstacles to look for include a high proportion of locked gates (in-person scouting may be needed to fully assess this), hilly terrain that would be unduly exhausting to walk, a lack of sidewalks on busy streets, or areas without streetlights if you're planning an evening canvass. Remove problematic turfs. Things *not* to worry about include "No Soliciting" signs, which don't apply if you are not asking for money.

☐ **If needed, scout your final turf candidates in person**

Once you've selected your top choices for turf you may find it wise to drive the streets of the turf itself and even knock on a few doors before sending a full team of canvassers there. In areas where a large proportion of houses are behind fences and closed gates this is the only way to determine what proportion of those gates are locked and truly inaccessible. Canvassing a few voters is also the best way to conduct a direct test of whether the turf contains enough unsupportive or undecided voters to be worth your team's time, and may also help identify areas where language barriers might be significant.

☐ **Track everything in a spreadsheet**
Create a system to compile everything you're learning about good and bad turf alike, to avoid having to repeat this process for the same area.

☐ **Gather feedback about each turf from canvassers**
When you give the canvassers their walk lists, include a turf report form they can use to evaluate their experience with the turf. Use their feedback to filter out problematic turf from canvass to canvass.

☐ **Evaluate supportiveness and accessibility at every turn**
Each time you canvass, analyze how many supportive vs. undecided vs. unsupportive voters canvassers encountered. If your canvassers are spending too much time talking with supporters or with unpersuadable opponents, adjust or seek new turf. Likewise, make a change if canvassers are encountering an undue number of obstacles to reaching their doors.

The Three Building Blocks of a Deep Persuasion Canvass Program on Transgender Rights, Continued:

NUMBER TWO: Build a Big Team

Volunteer Recruitment: How and Why Having a Big Team Matters

By prioritizing volunteer recruitment, we were able to canvass on a much more remarkable scale; impact more voters; learn faster; keep our volunteers invested in reducing anti-transgender prejudice; and also help our partner organization, SAVE, learn much more quickly how to build and sustain an effective volunteer canvass on their own, without our ongoing help.

We had **122** Miami-based volunteers over the span of 13 canvasses.

- **28** of those canvassers identified as transgender and/or gender non-conforming;
- 47% of all canvassers canvassed 2 or more times;
- 64% of transgender and/or gender non-conforming volunteers canvassed 2 or more times;
- 68% of Miami volunteers were developed into canvass leaders;
- About a quarter of those leaders were transgender/gender non-conforming.

In this section, we lay out *how* we prioritized volunteer recruitment and *why* this enabled us to achieve our results. Before the LAB arrived in Miami, SAVE's list of volunteers was cold; very few or no new volunteers were participating. Almost as problematic, SAVE had only two to four transgender/gender non-conforming volunteers who had volunteered recently and consistently, and only one of them was canvassing.

Below are our five best practices to grow a big, trans-inclusive team. *By using these practices, in six months we increased volunteer turnout significantly across the board and the number of active transgender/gender non-conforming volunteers increased by 78%.*

At the end of this section is the checklist of tactics we used. Materials used can be found in the Appendices.

1. **We invited volunteers to join in the *same* thinking, planning, and evaluating process as paid staff; they became equal partners in the project. The result: volunteers were eager, confident, and capable of taking ownership of the canvass and its results, making it possible for SAVE to continue the work without the LAB after the initial six months.**

Creating a team and culture where volunteers take ownership is more demanding than simply completing a task. It is rarely seen even in high-functioning LGBT community organizations. Yet, once established, the team culture pays huge dividends. Projects continue long. Staff and volunteer satisfaction is higher. Excellence persists.

To establish this culture, every staff member needs to view each volunteer as a potential leader, who may have as much to contribute as any staff member. Volunteer feedback as to what works or doesn't work is often as valid and important as yours. Their understanding of the work is often as valid and important as yours.

One major way we invited everyone into the *thinking* was by **asking volunteers to strategize, to problem-solve, and to consider the bigger picture questions about how to achieve project goals around recruitment.** This allowed volunteers to consider and better understand the *Whys* behind the project and feel more confident taking ownership. Together, staff and volunteers addressed the following recruitment questions:

- How many people do we need to recruit to achieve our goals? Do we think we can realistically achieve this goal? Why do we think that?
- How do we recruit these people? What is going to be the best, most effective use of our time that will produce show-ups, not just sign-ups?
- Who has been showing up to canvasses? How did we recruit them?
- Do we need to find new people to get involved or keep trying the list of people we have, or a combination of both?

- How are we going to recruit? What are we going to say? What's the urgency we will teach to inspire and motivate people to try out such challenging work? How do we make new volunteers feel comfortable enough to show up to canvass? What do we need to add for volunteers who have canvassed before?
- What worked well in the past? What didn't work so well? What is in our control to improve?

After addressing these questions together, we were able to see what this project needed *and the specific actions we need to ask volunteers to participate in.*

2. **In every recruitment conversation, we took the time to provide a clear description of what each volunteer would be doing; *why* this specific activity was vital; and *why* the volunteer's contribution was important and would make a difference.**

An effective ask is *not* a rush to get a "yes" or a "no." Instead, it's an opportunity to connect with the person you're calling.

This mindset was particularly crucial to increase and retain the number of transgender and gender non-conforming volunteers. Prior to every canvass, we prioritized one-on-one meetings and **20- to 60-minute phone call conversations with transgender/gender non-conforming volunteers**. We had direct, honest conversations with *every* transgender/gender non-conforming volunteer to make clear our interest in them; our commitment to their safety and comfort; and our appreciation of their participation and leadership. Our goal in these conversations wasn't simply to squeeze a Yes out of them—but instead, to **listen**.

The model used by our team (as well as others, including those at the National LGBTQ Task Force) is called, in shorthand. "FAB." FAB stands for Friend, Activist, Banker; it reminds us to invest in building a personal connection with every potential volunteer and to deliver a strong sense of urgency, both about the problem we're facing and the value of the action we're taking to address the problem. After this foundation, the recruiter then makes a direct, specific ask.

What is unusual about the "FAB" model is that each conversation that an organizer initiates with a volunteer is intentionally relational *before* the organizer asks the volunteer to sign up and commit to getting involved with a specific piece of the LAB's work.

Our organizers view *every* recruitment conversation as an opportunity to deepen their and the LAB's connection with the volunteer. This is the "Friend" part of the dialogue. During this section, in addition to asking how the volunteer is doing, we also take the time to ask a little more about their underlying motivation to get involved; the reason they signed up to do (or have already done with us) the kind of work we do (going beyond the "equality for everyone" declaration); who they know who is personally impacted by the work we do; have they ever done any activist work like this before; and how they are feeling about this work. We also share our experiences and begin to demonstrate what active listening looks and feels like.

We don't rush past the "Friend" part. In some ways, the word "Friend" is a vast oversimplification of the relationship we are seeking to build. We really want every volunteer to engage with us about what truly matters to them in public life, how they want to participate in public life, and why they care.

In the LAB's work with allies and partners around the country, we notice that almost no organization does the "Friend" part of the conversation; or, if they do it, they do it only the first time they interact with a volunteer. Our impression is that organizers initially think this will be burdensome to them, to take this kind of time when they just want to get to the more transactional part of the call, such as "the ask." As a result, when we are first running with organizers, even experienced organizers, we see them making very quick calls to volunteers. Typically, in the first fifteen seconds, the organizer is saying something like, "We are canvassing again this week; can you come?"

But this is counter-productive—not efficient at all. "Friend"-free calls are a bad practice that deliver a low show-up rate and little leadership development. The truth is that volunteers make big commitments and follow through on them *because* we start with the "Friend" exchange and conversation. Taking this time helps each volunteer reflect on why they are active with the LAB and why they are self-motivated to participate in a serious way.

The situation is similar when we switch to the "Activist" part of the conversation. Our tone becomes more urgent during this section, because we lay out the political landscape and why the LAB is engaging right now doing whatever demanding work we are doing. Sometimes the "Activist" portion of the call is simple, e.g. reminding them that there are 29 states where discrimination towards LGBT people is legal. But, more often, we review in detail the context for the action in which the LAB is engaged, including our larger purpose as well as the larger political environment that compels us to act and supports our strategy.

Only after each volunteer gets to think about this with us and ask questions do we get to the direct ask. Then, we ask them to sign up for a specific shift and ideally also a leadership role; get involved; and be a part of our team. This is the "Banker" part of the conversation, where we essentially provide a solution to the problem we just laid out and ask them to be part of the solution with us.

When organizers have the full FAB conversation during their volunteer call time, the volunteer show-up rate increases exponentially. Volunteers know why they matter. They are excited to come in. They are a lot more likely at every juncture to make a commitment and to live up to it.

Also, the initial FAB conversation makes it much easier to do brief, effective reminder/ confirmation calls in the 48 hours before the action, and wake-up and no-show calls on the day of the action, all of which boost volunteer turnout. See Appendix 26 for more details.

3. **We offered support in a wide variety of ways, so that every volunteer coming in got what they needed to do their best.**

<u>To solidify the commitment for all volunteers:</u> We recognized our volunteers were at different places when talking about gender identity and transphobia. Some volunteers who identified as transgender and/or gender non-conforming were comfortable talking about their experiences with voters; others were not always comfortable coming out. Some volunteers did not know anyone transgender before canvassing. As a result, different volunteers needed different kinds of support and motivation.

For example, to support transgender and gender non-conforming volunteers, in addition to one-on-one meetings and phone conversations, we had group meetings. In this setting, transgender and gender non-conforming volunteers could talk with other transgender people about the strengths and challenges they foresaw or experienced when canvassing. In working with the National LGBTQ Task Force, we also recruited transgender and gender non-conforming people from around the country to participate in a canvass in Miami in May. The result was 33 transgender and gender non-conforming individuals from around the country and Miami canvassing and offering emotional support to one another.

Another example of support for volunteers who didn't know a transgender or gender non-conforming person: we had one-on-one meetings and phone conversations to help them understand how their personal motivation for reducing transphobia is more connected to their real lived experience than they might initially think (e.g. their relationship to their gender or their experience feeling judged). As a piece of leadership development, some transgender and gender non-conforming volunteers were excited to support volunteers who didn't know someone who is transgender by sharing their own experiences.

To solidify the commitment of a nervous new canvasser: Often we invited new volunteers to low-pressure actions to introduce them to our work, such as orientations, material prep, data entry and filming canvass conversations (by being a video partner for another canvasser). When we gave volunteers space to ask questions and reflect, we better met their fears and concerns; they were more likely to decide to canvass; and, when they then canvassed, they were more likely to feel comfortable, succeed, and want to return.

4. **After the canvass, we followed up by thanking every volunteer in order to make sure volunteers knew that *we* viewed them as an essential part of our team.**

We asked every volunteer one-on-one, in person, or over the phone how their experience was; what they learned; and how we could improve our canvass conversations and the entire canvassing experience**.** The result: we were able to build institutional trust and volunteers became more invested.

Follow-up calls proved particularly vital for building trust with our transgender and gender non-conforming volunteers, as it became clear to them that our organization was not merely interested in numbers. The calls proved that we genuinely believe that in order to dismantle transphobia, **we must listen to the experiences of transgender and gender non-conforming volunteers** and create pathways for their leadership growth in the organization.

This extensive follow-up process also became key for us to retain volunteers over the span of 13 canvasses. To see a follow-up script, go to Appendices 33 and 34.

5. We sought out face-to-face opportunities to recruit new people.

***What works*:** speaking to college and high school classes; going door-to-door in college dorms; tabling at events where you are in front of the table and actively approaching people as they walk by, rather than waiting for them to come to the table. Having a leader of an organization or congregation ask their membership to get involved. Calling up-to-date lists of those who support the cause, especially if they have recently expressed or reaffirmed interest in getting involved.

Face-to-face opportunities were the number one way we recruited transgender and gender non-conforming volunteers. We met with over a dozen transgender and gender non-conforming support groups in Miami, usually with five to ten people at once, talking about our work and allowing time for questions. We processed as a group what canvassing means to us individually and collectively, both the rewards and challenges. This allowed us to give transgender and gender non-conforming volunteers an *honest, genuine picture* of the work we do and why we are inviting them in.

What doesn't work, particularly as stand-alone tactics, without benefit of the recruitment approaches mentioned above: email, social media, snail mail, or any one-way communication where there's no chance for dialogue; and calling pre-existing lists that include names gathered long ago and old contact information.

Effective Volunteer List Building and Retention Tactics:

1. Class Pitch Days, Florida International University

Our most effective volunteer recruitment tactic was to organize campus pitch days, where four to five staff members and volunteers worked for eight intensive hours doing five-minute class announcements.

For example, we organized one pitch day at Florida International University and increased FIU campus productivity more than 100% compared to the prior year. In one pitch day, we made 13 pitches; 721 students heard one or more announcements; 85 students signed up for a specific shift; and, of those, 24 new students participated in the canvass. Many returned multiple times, and two of these students became almost-full-time interns.

An additional bonus: because each staff member got to coach the others on our team, we all gave and received feedback on presentation skills and ability to convey urgency. As a result, we all improved and now have a new model to share, teach and replicate when we teach recruitment.

How to create a campus pitch day:

☐ Create a Google Doc of all the classes you've selected to pitch with name, date, location, time, professor and professor's email

☐ One week prior, email professors to ask to give a three- to five-minute pitch at the beginning of class

☐ Recruit a team of four to six staff and volunteer pitchers and two to four helpers to hand out small sign-up slips

☐ Write class announcement pitch script (see appendix 23)

☐ Run a pitch training and rehearsal

☐ Two days prior, send follow-up emails to professors that did not respond

☐ Create a run schedule for the pitch team of which classes they will be attending

☐ Create, print and cut pitch slips for classes

☐ Have a great pitch day!

2. Info Sessions

We have discovered that in order to recruit first-time volunteers to a canvass from a pitch day, we are best served by recruiting them to come first to an on-campus info session. In ninety minutes, an info session gives potential volunteers the big picture on why we canvass; shows them video of a canvass conversation; and gives time for all of us to honestly discuss questions, fears and concerns. In addition, we spend a good amount of time on introductions. The discussion helps potential volunteers build community with others are interested in the movement. The result: 50% of info session attendees recommitted to participate in the canvass. Without the info session, first-timers would have only been half as likely to show up.

For a sample info session agenda see Appendix 31.

3. One-On-One Meetings

Lasting 20-60 minutes, each one-on-one allowed us to dive deeper with each volunteer or coalition partner, asking about their personal motivation; their perspective on the potential of canvassing to move the transgender equality movement forward; and their biggest worries or challenges. The conversations were intentional, but not strictly structured. To see an outline of a one-on-one meeting, please see Appendices 35 and 36.

4. Video Viewing and Video Coaching

Learn how to facilitate a video viewing on page 35.

5. Recruitment Calls

Calling engaged people who said they were interested in canvassing and kept them involved. Together, staff and volunteers spent 10 to 20 hours a week on the phones recruiting for canvasses. Once a week, we held a three-hour volunteer recruitment phone bank where volunteers called other volunteers to recruit them. What was said in each call was tailored to match the specific list of people we were calling. Please see Appendices 25 and 26 for sample recruitment scripts.

How to Create a Volunteer Recruitment Phone Bank:

- € Confirm all volunteers who signed up to attend the phone bank 48 hours before the action
- € Create Volunteer Recruitment Phone Bank Script
- € Create Sign-up Sheet (for volunteers to record who is recruited during the phone bank, and to which actions)
- € Create Sign-In sheet (for volunteers who are doing the calling to sign in as they arrive)
- € Create a training and put key talking points on a flip chart
- € Create a debrief and put key points on a flip chart
- € Pull a list of volunteers to call (30 dials per caller per 1.5 hours of calling)
- € Order food for the callers!
- € Make sure everyone has a phone (if you are providing phones, make sure they are charged)

6. Confirmation Calls, Confirmation E-mail and Carpool

Five days before the canvass, we sent every volunteer signed up an email with all relevant logistics: arrival times, parking information, directions to training site, instructions on how to download the video on a smart phone, and contact numbers.

Two to three days before the canvass, we called everyone who had signed up to confirm them. We treated the confirmation call as our last chance to problem-solve and motivate volunteers to come to the canvass. Because we were not just going through the motions making these calls, they were often ten to twenty

minutes long. Yet this was a great investment of our time: volunteers were much more likely to show up and feel good about showing up. For each canvass, we had six rounds of confirmation calls, continuously calling people we didn't reach in the previous round. We left a voice message during round three and texted during round four. We also organized carpools and aimed to have all drivers and riders informed of their carpool details by mid-day before the canvass.

Please see Appendices 28-30 for sample confirm call script, confirmation e-mail, and carpool spreadsheet.

7. Follow-up Calls

These calls typically take about twenty to thirty minutes to complete because we debriefed the volunteers' experience in each call. We made these calls two to three days after the canvass. Please see point four for a more extensive description for thank-you calls. A sample follow-up call script for both ally and transgender canvassers can be found in Appendices 33 and 34.

The Three Building Blocks of an In-depth Persuasion Canvass Program on Transgender Rights Continued:

<u>NUMBER THREE: A Committed Team of Leaders</u>

At the LAB, a committed team of volunteer leaders partner with our staff. We do high-quality, imaginative, powerful work because we have this entire team.

How do volunteer leaders actually add value? Three ways.

1. **Volunteer leaders take on staff-like responsibility at canvasses to ensure the actions are well organized and newcomers are supported**.

   68% of our canvass volunteers in Miami were given and gladly took on true leadership positions. These ranged from entry-level leadership roles, e.g. greeters; to key roles leading training, such as pod leaders, coaches, and co-trainers; to the most demanding jobs such as day-of canvass coordinators—

twelve different types of leadership roles in all. Returning canvassers were more likely to stay involved because they got to lead: they liked developing new skills and feeling fully utilized; they loved doing the coaching and helping newcomers succeed.

Having a huge team of volunteer leaders completely changes the canvass experience for every participant. By huge, we mean that ideally about half the people at every canvass are in a leadership role, e.g. for a great 50-person canvass, aim for having 25 or more of the volunteers serving in a leadership role. For the leaders, it's more fun to lead; it's immensely satisfying to help newcomers succeed. For newcomers, having this level of peer support meant they were more likely to succeed, to have higher quality conversations, even to see for themselves that they were changing voters' minds—and this kind of success is a powerful motivator for first-timers to come back and canvass again.

2. **When leaders own the work, they come back and take our effectiveness to the next level.** We are smarter when everyone on the premises is thinking and when we think together. Leaders and returning canvassers gave invaluable feedback on the turf, script, training and how best to support new canvassers.

3. **Developing new leaders is a powerful long-term investment in the professional development of both the volunteer and the paid organizer who works with them.** When we utilize the strongest capabilities of each person around us, we develop volunteer leaders and build the base of talented organizers that future campaigns would otherwise struggle to find and will be lucky to hire. We provide a professional development opportunity for young organizers who learn (by doing) the most critical yet often neglected organizing skills: motivating, delegating, training and managing a team.

HOW TO IDENTIFY VOLUNTEER LEADERS

We utilize three tools to discover volunteer leaders:

1. **During every action it's everyone's job to pay attention to the work of volunteers and to be curious about who's got drive and talent.** Part of every staff canvass debrief agenda dedicates time for everyone to report back on the great people they've discovered. By constantly evaluating and discussing new potential leaders, you will create an environment where your staff is keeping an eye out for new people all the time.

   Specifically, during our 13 Miami canvasses, **we developed 56 volunteers into canvass leadership positions.** We were able to do this because our entire team was on the lookout at every canvass for volunteers who were mastering the basics. All of us informally talked with as many volunteers as possible, to see who had a desire and aptitude to support and train others.

   This mindset—always looking for leadership potential—is the single most important reason why we were so effective at retaining canvassers. Of the **122** volunteers who canvassed on trans rights:

   * 47 returned 2 times or more;

   * 28 returned 3 times or more; and

   * 18 returned at least 5 times.

2. **When planning your week, look at your schedule and ask yourself, how can volunteers add value to my work? Who would enjoy this work?** By working from the assumption that a volunteer will be able to add value, organizers can do a better job at delegating and utilizing their volunteer team, and also make better use of their own time.

3. **Ask in both group and one-on-one recommits: who would like to take on more?** Recommits at actions are a great way to ask for people to take on other work and be part of a special team. We have often formed a recruitment team, a confirmation call team, a turf team and material prep and data teams.

HOW TO DEVELOP LONG-TERM CANVASS LEADERS

Before each canvass:

- ☐ **Create a list of volunteer leadership positions.** Utilize your staff and volunteers to develop a list of positions and descriptions for both the day of and beforehand. For example: Pre-Canvass: material prep lead; confirm call lead. Day-of canvass: trainers, sign-in, greeters, coaches, volunteer coordinator and site coordinator.

- ☐ **Develop deeper relationships. Then, place volunteers in leadership roles that match their readiness and make a plan with them.** Meet face-to-face with volunteers to identify their motivation, skills, and strengths; then ask for them to fill a specific position at the next canvass. Ensure that they understand the time commitment for the role and how they will be trained—and that they are excited about the opportunity.

- ☐ **Take time to fully train volunteers for every position.** Ensure each volunteer leader fully understands their responsibilities, *how* those responsibilities fit into the larger picture, and *why* their role is so critical. Rehearse with them (do not skip this! How will they know how to do something to a standard of excellence if we don't show them?); discuss potential problems; and teach them how to both recognize problems and how to solve them. Do this for every position, even those that might seem obvious, e.g. greeter; because every position can be done either in a mediocre way or at a level of excellence, and you need the latter to have the canvass realize 100% of its potential. Training may be done one-on-one or in a larger group; if done in a larger group, check in one-on-one with every leader to be sure they have a full understanding of their role, and that they truly like and want to try fulfilling their role.

During the canvass:

- ☐ **Give leaders support and coaching.** Make sure each volunteer knows who their support person/ supervisor is. During the canvass, the support person/ supervisor should give that volunteer specific feedback: what specific thing(s) are they doing really well? What specific thing(s) could be improved? Give praise when a volunteer has earned it by excellent performance; it is extraordinarily motivating.

- ☐ **Ensure that every first-time canvasser's experience is everyone's highest priority.** Create systems for radically welcoming and supporting new volunteers. E.g. train pod leaders to pair nervous first-time canvassers with seasoned canvassers.

- ☐ **At every canvass, after the overall canvass debrief (in which every single canvasser participates), and after the non-leader volunteers have headed home, debrief your volunteer leaders together. They made the canvass possible and have valuable thinking to offer**. Debriefing as a leadership team allows leaders to think together immediately after the action. Discuss the strong points and deltas (weak points) of the canvass logistics, leadership roles, training, debriefing and the script; and identify new upcoming leaders. The volunteer leaders debrief is a great time to honor and thank all leaders for their invaluable efforts. It's not a waste of time to allow everyone to point out something that someone else did particularly well that day. You can also recommit leaders for extra video viewing and coaching. See Appendix 22 to see a leaders debrief agenda.

After the canvass:

- ☐ **Schedule follow-up call time where you call each leader the following week.** During the call, thank them again for their work, give them specific positive feedback on their role, and debrief their canvass conversations.

These calls are a great time for you to assess: is this volunteer in the correct leadership role? Should they be promoted? Do they need extra coaching on their role or canvass conversations? Finally, make a plan for next steps: more training, their next leadership role, or coming in for a pre-canvass leadership role.

- ☐ **Involve your volunteer leaders in the thinking; be transparent and honest.** Once volunteers are involved, invite them to lead as well as participate in the most basic capacity. Hold think tanks. Involve them in call time, training or debriefing. The more thinking each volunteer does the more likely they will retain what we're trying to teach and the more likely they will contribute to improving the overall thinking of the team.

- ☐ **As each volunteer leader improves over time, increase their responsibilities—promote them—especially those demonstrating talent and promise.** Take time to observe and understand each volunteer leader's experience in their position so you can thoughtfully and accurately tell them what they can improve upon and how. Once they have mastered a position, move them up to train other leaders or coordinate on a larger level.

If you would like to see sample leadership development materials please go to:

Appendix 2 and 3	Canvass Job Descriptions for all volunteer and staff roles
Appendix 4	Canvass Leadership Positions List
Appendix 6	Canvass Checklist for Pod Leaders and Coaches
Appendix 7	Canvass Small group training outline for Pod Leaders and Coaches
Appendix 1	Canvass Action Lead and Site Coordinator Run Schedule
Appendix 32	Radical Hospitality Training

Appendix 37 Volunteer Canvass Leaders Training and Leaders Debrief

Appendix 33 and 34 Follow-Up Call Script

Appendix 35 and 36 One-on-one Training

Interested in Replicating this Work?

One possible six-month Replication Plan,

if your organization wants to partner with the LAB

Goal: Partner with the LAB for six months to develop your organization's capacity to run a sustained, volunteer-led, deep canvassing operation that can operate without being dependent on the LAB's ongoing help, able to run at least two canvasses per month and reach a minimum of 300 voters per month thereafter.

- **Total LAB Staff Days on Ground:** 214-286
- **Total number of your organization's staff committed:** 1-2 of your staff members in months 1-3, and then 2-3 of your staff in months 5-6
- **Total Voter Conversations over Six-Month Project Build:** 655 - 800

MONTH ONE

Staff Commitment:

- 2 LAB Staff on ground for 10 days
- Your organization's staff devoting 100% of Time: 0-1
- Your organization's staff devoting 50-75% of Time: 1-2

Focus:

- Introduce your organizers to the deep canvass approach, script, and training through firsthand experience. Give them opportunity to evaluate and ask questions.
- Begin to identify strongest, most walk-able persuasion turf
- Begin to identify and recruit strongest potential volunteer leaders.

Actions:

- 1 Staff Video Viewing
- 1 Test Canvass (3-5 volunteers as videographers, 15-20 conversations)

MONTH TWO

Staff Commitment:

- 3 LAB Staff on ground for 10 days
- Your organization's staff dedicating 100% of their time: 1-2
- Your organization's staff dedicating 50-75% of their time: 1

Focus:

- Hold first, modest volunteer canvass, to introduce your staff and potential leaders to canvass leadership structure
- Record your staff on video for script development and training purposes
- Conduct group recruitment call time
- Calendar and build out recruitment and voter contact plans

Actions:

- 1 Video Viewing (staff and vols)
- 1 Info Session/Message Training
- 1 Small Canvass (7-12 vols / 30-40 conversations)

Month 3

Staff Commitment:

- 4-6 LAB Staff on ground for 10-14 days
- Your organization's staff dedicating 100% of their time: 2
- Your organization's staff dedicating 50-75% of their time: 1

Focus:

- Hold first full-scale canvass, with fully-executed leadership structure
- Hold first major canvass recruitment push

- Do one-on-one video training with all of your organization's staff using their previously-filmed conversations
- *At end of this trip, hold a two-way evaluation assessing the project so far; each organization determining whether they want to continue*

Actions:

- 1 Large canvass (20-25 volunteers / 70-100 voter conversations)
- 2 Campus Pitch Days / Other Major List-Building Push
- 1 Campus Info Session
- Materials Prep Action (or help from daytime volunteers)
- 1 Recruitment Phone Bank
- 1 Canvass Leaders Training Night
- 1 Confirmation Call Session

MONTH FOUR

Staff Commitment:

- 4 LAB Staff on ground for 7-10 days
- Your organization's staff dedicating 100% of their time: 2-3
- Your organization's staff dedicating 50-75% of their time: 1-2

Focus:

- Train your organization's staff to run canvass independently
- Train your organization's staff on advanced volunteer retention and leadership development skills
- Hold Volunteer and Staff Video Viewing Think Tank to begin learning, evaluating, and improving canvass model as a team
- One-on-one video coaching with volunteer canvassers

Actions:

- 1 Big Canvass (25-30 volunteers / 100-120 conversations)
- 1-2 Volunteer Recruitment phone banks
- 1 Team Video Viewing Think Tank
- 1 Materials Prep Action

- 1 Confirmation Call Session

MONTH 5

Staff Commitment:

- 4 LAB Staff on ground for 10-14 days
- Your organization's staff dedicating 100% of their time: 2-3
- Your organization's staff dedicating 50-75% of their time: 1-2

Focus:

- Your organization's staff and volunteers lead and execute second major recruitment push
- Your organization's staff lead the canvass and begin to train volunteer leaders to perform top canvass leader roles
- Do a formal project evaluation with each individual staff member at your organization: What's going great? What's a challenge? Personal feedback and team visioning for final month of project and beyond.
- Lay groundwork for a canvass that is entirely led and run by your organization's staff and volunteers at the beginning of Month 6!

Actions:

- 1 Canvass (40-45 volunteers / 160-200 conversations)
- 1 Recruitment phone bank
- 1-2 Campus Pitch Days
- 1 Campus Info Session
- 1 Materials Prep action

MONTH 6

Staff Commitment:

- 4 LAB Staff on ground for 14 days

Focus:

- At the beginning of month six, your organization's staff and volunteers run a canvass without the LAB
- Starting the week after the canvass, LAB staff are present to help evaluate and troubleshoot your organization's first solo canvass
- Your organization's staff lead volunteer video viewing think tank to take ownership of the learning and script development process
- Plan and calendar for ongoing canvass operation in LAB's absence. Include volunteers in this thinking.
- Your organization's staff oversee volunteers in leading one final canvass, including problem solving, while LAB staff are on ground to assist minimally with problem-solving and only if truly needed.

Actions:

- 2 Big canvasses (one just before beginning of LAB visit, one at end)
    - First: 30-35 volunteers, 130 conversations
    - Second: 40-45 volunteers, 170 conversations
- 1 Video Viewing Think Tank
- 2 Volunteer Recruitment phone bank (1 recruitment and 1 retention, both volunteer-led)
- 1 or more confirm call sessions
- 1 Volunteer leader planning session for the future canvasses
  1 materials prep action

Expense budget for the LAB for its role in the above six-month plan:

Based on our experience in Miami partnering with SAVE, the LAB would budget for 6 trips of 7-14 days each with 2-5 staff members on each trip.

LAB Expense Estimate for a future project: **$95,000 *** includes LAB staff time on the ground working with the partner organization, and LAB staff transportation costs and per diem, but does not include housing for LAB staff. It also does not include money for the substantial amount of LAB staff time (or their supervisors' time) devoted to the project when LAB staff are physically present in Los Angeles.

Replication Summary:

Cost of the LAB's work in Miami:

Starting in January 2015, LAB staff spent 159 days on the ground in Miami and spent **$85,509.55** (as above, this includes LAB staff time when on the ground with the partner organization; but does not include LAB staff time working on and supporting the Miami project when physically present in Los Angeles; nor does it include LAB supervisory staff time of supervisors present in Los Angeles). The large majority of the money was spent on personnel when on the road, per diem and travel from Los Angeles to Miami. Other expenses included food for volunteers, purchase of some equipment, and small parking and event expenses.

Days on the Ground in Miami						
	Virginia	**Steve**	**Dave**	**Laura**	**Ella**	**Total Days:**
Flying	8	14	4	8	14	47
Working	34	43	8	24	50	159
Total Days:	41	57	12	32	64	206

Miami Cost January-June 2015		
Total	**$**	**35,731.77**
Other Expenses	$	5,012.28
Travel - Staff Per Diem	$	7,468.50
Travel - Transportation	$	23,250.99

LAB Personnel Cost		
Personnel Total	**$**	**49,777.78**
Director Days: 12	$	5,421.00
Manager Days: 96	$	25,400.64
Organizer Days: 98	$	18,956.14

LAB's Total Cost of Miami Project	**$**	**85,509.55**

What was the cost for SAVE during our six-month collaboration?

Salary and Benefits:	$51,000.00
Food & Supplies:	$5,347.24
Cell Phones:	$1,041.61
Mileage:	$939.00
Printing (in office):	$1,350.00
Total:	**$58,738.85**

BEYOND REPLICATION: Can this approach be taken to scale?

If you have read this far, you are obviously interested in understanding in detail the deep persuasion canvass that the LAB has invented and developed.

There's a lot that is wonderful about our persuasion canvass—but we are the first to acknowledge that, like every campaign tactic, it has both strengths and weaknesses.

In the sections above, we flag many possible pitfalls, as well as the ways we got past them.

But an additional worthy question is: when should deep canvassing be put to use?

The major virtue is that deep canvassing actually works and its impact lasts—unlike many other campaign tactics that don't work and don't last. Deep canvassing—even on a small scale—is a more compelling choice than any tactic that gives the illusion of "touching" many voters fast but actually doesn't "touch" any of them in a way that changes their hearts, minds, or votes. Even when you need a million votes to win, a little bit of something still beats a whole lot of nothing.

But no tactic is a panacea. Three caveats come immediately to mind.

First, deep canvassing works gets up and running fastest when an organization or campaign already has a terrific volunteer leadership team and a large group of active volunteers. The smaller the team you begin with, the more work you'll have to do right at the start to grow your team.

Second, deep canvassing works only when you are open to doing things differently than you have in the past. Deep canvassing is close to being the opposite of conventional modern campaigning (which is a sad commentary on the lack of curiosity about persuasion that informs modern campaigning).

Third, deep canvassing is particularly powerful when you have a longer timeline, so your staff and volunteer team can reach a greater number of voters. Many tactics *feel* faster. Often, this is because they measure effort rather than impact. E.g., any time you hear a campaign brag about "doors knocked" or "dials," they

are measuring with greater precision the effort they have made rather than the actual number of voters they have won over.

To advance your thinking about when and how to add deep canvassing to a larger voter education or voter contact plan, we offer the following ten observations and practical suggestions.

1. **In highly competitive elections**, sometimes even small-scale voter persuasion matters enormously: Many elections we care about are close. Some recent anti-LGBT ballot measures, for instance, were decided by fewer than a few thousand votes (the 2001 loss in Houston, Texas by 6,000 votes); some by less than a couple of hundred votes (the 2014 win in Pocatallo, Idaho by 80 votes). A deep persuasion canvass can reach that many voters even in a single election. It can therefore turn defeat into victory, by persuading some conflicted voters who would otherwise break against us to instead vote with us.

2. **In smaller districts**, this kind of canvass can even allow us to quickly change the political dynamic: Key state legislative districts, Congressional districts, even small states are ideal locations for this kind of canvass, where 100, 500, 1000, or 5000 votes routinely make the difference between winning and losing.

3. **Growing the base of extraordinary volunteers** highly motivated by doing this kind of transformational political work: Your most talented and dedicated volunteers and potential volunteers want to help address and solve the long-term problem, not just skate past one immediate election. They get excited by the long-term potential of this approach. If a deep persuasion canvass becomes a permanent, ongoing organizational activity to transform the electorate or the broader public, it can grow your organization's volunteer base remarkably in size, capability, effectiveness—and also in longevity. Your best people stay engaged over a long time because there is exciting, stimulating, meaningful activity to do every year and year-round.

4. **Selective use** of the canvass gives an organization or campaign one more way to target persuadable voters: A deep persuasion canvass can be used in

special circumstances to augment everything else going on to improve public opinion. For example, a campaign might use the canvass to complement other tactics, e.g. to follow-up with voters already identified as undecided or persuadable who need additional attention for us to win them over; or in situations where other tactics are not available or don't work well. An organization might use the canvass to build a more diverse base of community support.

5. The canvass is a powerful, **low-cost, low-risk research tool** to test our paid media such as TV spots: A deep persuasion canvass is terrific at getting voters to be much more honest expressing their susceptibility to the opposition arguments and to appeals to prejudice. The interaction can include playing an opposition ad we fear and then following it with a new ad we've created that we hope can successfully counter it; this may be the most accurate way to get a read on whether a new ad of ours is good enough.

6. The canvass can **generate new ideas for paid media spots** and earned media talking points: The constant iterative learning woven into a deep persuasion canvass often reveals the effectiveness (or lack thereof) of both proposed new and established old talking points. Consider this kind of canvass the world's longest, slowest focus group, only better because of the candor gained in one-on-one conversation instead of in a group.

7. The canvass **expands the resources** available to an organization or campaign, because it taps otherwise unused or under-used resources: Many dedicated, skilled people are highly motivated to volunteer for a cause like ours. Yet we often engage only a small percentage of these wonderful people because we don't have enough for them to do; and those who do get involved we often use at less than their full potential capability. This kind of canvass can solve both those problems and grow your organization and volunteer capacity as you invest in it.

8. The canvass creates video **evidence that voters are persuadable**: Deep persuasion canvassing can yield extraordinarily inspirational video footage of conversations with voters. This can motivate your funders to give more money

and (in an election) to give it earlier. The video will raise morale among your whole team. It can show the media (and skeptics in general) that voters are move-able. Video can teach your volunteers and organizers what voter movement looks like and give them hope and clarity about how they will achieve it when they are out in the field.

9. The canvass **serves the larger movement** and contributes to a vision for social change: Deep persuasion canvassing has the potential to reduce prejudice; to build a team of people who discover that they have more ability to make change than they might have previously thought; and to insure that progressive voices are heard and progressive views more seriously considered. Organizations and campaigns cannot always prioritize advancing these long-term goals; but they fulfill their larger mission best when activity that enhances essential short-term goals also serves the long-term.

10. The canvass prepares us to **deal with an increasingly sophisticated opposition**: Our opponents are extreme but getting smarter about camouflaging it. Which means we can't afford to pass up any tool with the potential to persuade more people to agree with us and vote with us. Our side has honed valuable tools improving our ability to turn out those who already agree with us, but we need a comparably remarkable set of tools to boost our ability to persuade additional people to see the issue the way we do. Otherwise, we will perpetually be in trouble in many jurisdictions, particularly in off-year or lower-turnout elections, or in any situation where a small group of grumps might be able to dominate public discourse.

CONCLUSION

We are eager to work with folks who are interested in replicating part or all of what we've done and hope this document aids that process.

With one caveat: the Los Angeles LGBT Center is a 501-c-3 organization, so the LAB regrets it cannot partner with replication efforts favoring one candidate over another or one political party over another. The LAB's mission, exemplified by the work described in this report, is non-partisan voter education rather than lobbying for or against a particular law. Our campaigns, including the wonderful collaboration with SAVE described in this report, are non-partisan voter education campaigns to reduce prejudice and advance values such as transgender equality.

For additional documents, videos, or to ask questions, please reach out to Ella Barrett at ebarrett@lalgbtcenter.org.

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- Tony Lima, Executive Director
- Aurelio Hurtado de Mendoza, Deputy Director
- Justin Klecha, Field Director
- Charo Valero, Field Organizer
- Devin Cordero, Communications Manager

Our independent researchers worked tirelessly to develop a model to measure our work:

- David Broockman, Assistant Professor of Political Economy, Stanford Graduate School of Business
- Josh Kalla, Ph.D. student in the Department of Political Science, University of California, Berkeley

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- National LGBT Task Force: Academy for Leadership and Action
    - Kathleen Campisano, Faith and States Organizing Manager
    - Justin Lemely, Organizer
    - Malcolm Shanks, Organizer
    - Rodney McKenzie, Jr., Faith Work Director
    - Daniel Moberg, Leadership Programs Coordinator
    - Victoria Kirby York, National Campaigns Director, Religious Exemptions and Welcoming Movements
    - Sarah E. Reece, Director of the Academy for Leadership and Action

- Goodwin Simon Strategic Research
    - Amy Simon, Partner

- Movement Advancement Project
    - Sean Lund, Messaging Research Director

- Equality Federation
    - Fran Hutchins, Director of Organizational Development & Training

This entire project could never have occurred without the unflagging support of Lorri L. Jean, Darrel Cummings, and the Board of the Los Angeles LGBT Center. We are fortunate to have the leadership of our organization enthusiastically support this project and the greater goal of discovering how to reduce prejudice – all forms of prejudice.

The LAB would also like to thank those who supported our overall program during the 2015 calendar year:

- Rockefeller Family Fund
- Wiener Foundation
- Evelyn & Walter Haas Jr. Fund

Having a large team of smart, dedicated people doing this work–both veterans and first-timers–meant we were able to expedite and maximize our iterative learning process. For every volunteer involved in this project, we want you to know what we know: we could not have done this without you. Words alone cannot convey how much we appreciate the time, energy, vulnerability and motivation you contributed throughout the year.

Time	Activity	Nat (Site Coordinator)	Renzo (Coaches Lead)	Belky (stay Back	STAFF	Notes
7:00am	Site is open	**X**				MARC 2nd Floor
8 :00-15	Arrive at site and unload cars FROM PARKING LOT PG-5	**X**			**X**	Coffee in ___ Car Pastries
8 :00	Coordinators Arrive Quick Team Check in	**X**	**X**		**X**	
8 :00	Action lead checks in with coordinator team before SCs take lead on set up	**X**	**X**		**X**	Communicate any last minute changes/updates (i.e. sick leaders)
8 :00	Site Coordinators inventory who's present to help with set-up and make asks accordingly	**X**				Site Coordinator Huddle!!
8 :15	**Set-up 1**: LOTS of "Canvass" signs directing people to sign-in	**X**				Make note of where/how many greeters needed
8 :15	**Set up 2**: Sign-in Table and Pod Assignment Table	**X**				
8 :20	**Set up 3:** Table/place for food, coffee and Video player check-out	**X**				
8 :15	**Set up 4:** Set-up training room extra chairs accessible; set up A/V needs (Steve's computer)	**X**	**X**			6 pods w/8 chairs each; pod closest to entrance, with one Video Pod
8 :20	All sign-in and video player check-out are in place	**X**				
8 :20	Greeters Arrive and Sign-in	**x**				
8 :30	Greeters in Place	x				
8 :30	Coaches and Pod leaders Arrive and SIGN IN	**x**				
8 :40-9	Coaches and Pod leaders Training/Cuddle (20 min)		**X**			Pamela and Kelsey-lead
8 :45	**Canvassers start to arrive**	**x**	**x**		**x**	
8 :45	**Mingle and get to know vols!**		**X**	**X**	**X**	**Everyone!!**
9 :00	coaches and pod leaders in pods as volunteers arrive					
9 :10-20	No Show Calls	**X**			**x**	**Carrie Davis**
9 :20	Annoucement Training will Start in 5 min	**X**			**X**	**??**
9 :30	**Training Starts**	**X**	**X**		**X**	**Everyone should be in training room**
9 :45-9:50	**Late comers? Place folks in Late comer pod**	**X**				
9 :50	**Late comers? Rerout New Canvassers to Support Team**	**X**				

Time	Activity	Nat (Site Coordinator)	Renzo (Coaches Lead)	Belky (stay Back	STAFF	Notes
10 :30	get # of canvassers to trainers during puddle break	X				
10 :45	Look at carpools and special needs canvassers		X		x	
10 :45	make sure food table is ready with snacks and water, sunscreen is available as canvassers leave.	X		X		
11 :00	**Trng ends**	X	X	X	X	staff member will set up laptop for stayback to use
11 :00-10	"Get It Together" Time	X	X	X	X	
11 :10	Volunteers leave for canvass turf			X	X	
11 :15	Site coordinators, stay back and action lead check in before heading out to canvass	X		X		**STAYBACK NEEDS AMEX BEFORE STAFF LEAVES**
11 :30	**Stayback task 1:** order pizza w/Amex to be delivered by 2:30p			X		Make sure to give Amex info on phone; communicate building pizza is delivered to and give phone #
11 :30	**Stayback task 2:** clean up sign-in materials and set-up for canvassers' return (signs, boxes, etc): quality control, tally station, breakdown and Video player return.	X		X		Nat
11 :30	**Stayback task 3:** Get sign-in slips and enter canvassers' name, precinct, turf and pod in master tally sheet on laptop	X		X		Nat
2 :00	QC lead, Site Coordinator and debrief team leave turf early	X				Ella and Charo
2 :30	Volunteers leave turf					
2 :00	Return sign in slips to Pods	X		X		
2 :30	Make sure QC, breakdown and tally teams are in place	X		X		
2 :45	All canvassers return	X	X		X	
3 :00	In pods, debrief conversations and **recommit** for actions on sign-in slips	X	X	X	X	
3 :30	BIG group Debrief starts	X	X	X	X	**Dave, Emily, Renzo,**
3 :45	Check in with tally team to ensure results will be ready on time	X				Tally = Nat P
3 :50	Tally team finishes and gives debriefers results	X				
4 :00	Debrief ends	X	X		X	
4 :00	Collect pink sign in slips and put in Site Coordinaor Box	X	X			
4 :00	Leader Debrief Begins	X	X		Clean	

Time	Activity	Nat (Site Coordinator)	Renzo (Coaches Lead)	Belky (stay Back	STAFF	Notes
4 :20	Clean up!!!	X	X		X	All materials at front door to put in Cars. Trash in black trash bags and ask where to put trash.
5 :00	Load car(s) and final look at site	X	X		X	

LOS ANGELES LGBT CENTER
LEADERSHIP LAB

Canvass Leadership Roles

A large leadership team greatly improves every aspect of a canvass, from the overall excellence of communications with voters to the subjective experience of both experienced and new canvassers. For a 50-person canvass, aim to have 25+ volunteers in one of these leadership positions. Include all of them in the thinking to the greatest extent possible, particularly including the leadership debrief.

Action Lead – Supervises coordinators and oversees entire canvass on the day-of. Prior to day of canvass: updates canvass documents spreadsheet and logistics checklist.

Site Coordinator - Day of canvass: oversees logistics team at front and back end of canvass, collects sign-in slips and general problem solving throughout entire action

> **Site Coordinator Shadow -** Shadows Site Coordinator prior to canvass and day of canvass to learn how to perform the duties of the role.

Volunteer Coordinator - Prior to day of canvass works with Action lead to recruit all coaches, and ensures a plan is in place to train them. Day of canvass: Trains and oversees Pod leaders and Secondary coaches, collects sign-in slips and general problem solving throughout entire action

Volunteer Coordinator Shadow - Shadows Volunteer Coordinator prior to canvass and day of canvass to learn how to perform the duties of the role.

Video Coordinator - Responsible for all video- related materials and makes sure videographers are trained and prepared for canvass and are paired up with appropriate canvasser.

> **Video Coordinator Shadow -** Shadows Video Coordinator to learn how to perform the duties of the role.

Video Player Team Members – Checks ad players in and out to canvassers who don't have their own, trains them on how to use it and troubleshoots any issues related to downloading the ads.

Photographer - Takes pictures of the canvass and then posts them to SAVE's facebook page.

General Canvass Trainer(s) - Prior to canvass: rehearses for training. Day of Canvass: leads canvass training; Creates flipchart or PowerPoint as needed

Canvass Leadership Roles *© 2015 Los Angeles LGBT Center 05/02/15*

General Canvass Debriefer(s) - Leads/facilitates canvass debrief which includes asking about conversations, canvassers experiences, reporting out tally results and recommitting volunteers

Rehearsal Buddy - Prior to canvass: sits in on Training/Debrief rehearsals and gives feedback.

Logistics Team (to include the following roles):

Set-up Team - Arrives early to set-up space including, sign-in area, pod chairs (if applicable), food tables, directional signs, bathroom signs and this event will be photographed signs.

Greeter - Greets canvassers as they arrive, has them sign a photo release form (if they haven't before) and directs them to sign-in table.

Sign-in - Has all volunteers fill out sign-in slips, hands out materials and assigns pod to canvassers based on their experience level, if they drove, and any other special pair-up requirements

Turf Coordinator - Prior to canvass: organizes turf folders by priority and category (i.e., Spanish speaking turf, media turf). Day of canvass: distributes turf folders to pods and collects turf folders from quality control station.

Turf Coordinator Shadow - Shadows Turf Coordinator prior to canvass and day of canvass to learn how to perform the duties of the role.

Breakdown Lead - Directs returning canvassers in what to do with their materials when they return from canvassing; organizes area for blank materials to be returned.

Quality Control Captain - Reviews all voter forms to ensure they are filled out correctly and all details needed for data entry are completed and filled out.

Quality Control Deputy/Runner - Assists the captain with reviewing all voter forms to ensure they are filled out correctly and runs incorrect forms back to pods.

Tally Team - Enters in the results from each canvasser's tally sheet into the master tally sheet to be given to the debrief team during debrief

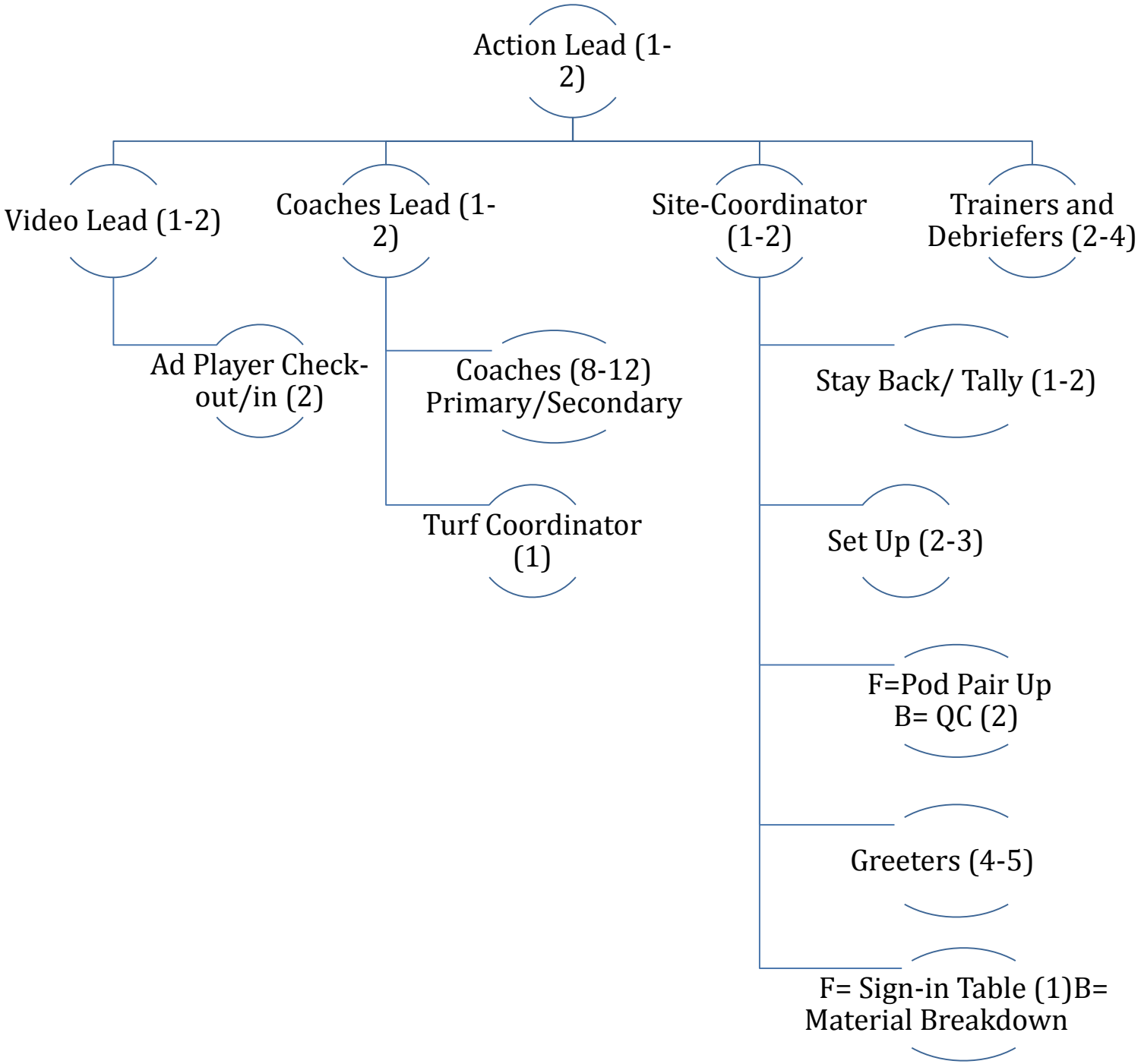
Stay Back - Cleans up room, makes no show calls, orders lunch, and prepares master tally sheet by entering in all the canvassers and their turf info, using the sign-in slips, into the master tally sheet then return sign-in slips to the pods.

Pod Leader – Responsible for all the canvassers in their pods through the day; leads small group training of canvassers on materials and facilities role plays of conversations during the training in pod huddles, aka "puddles") as well as quality control of materials and group recommits after canvassing.

Secondary Coach - Provides support for Pod Leader and helps guide the canvassers in their pods through the training and facilitates additional in group training.

Floater - Assists in any of the above roles as needed.

Canvass Roles



Appendix 3: Canvass Roles Diagram

	ABORTION Canvass Details:	Date:	9/20/2014				
		Location:	WRHAP - Whittier				
		ADs Shown:	Rebecca's Choice				
		© 2014 Los Angeles LGBT Center					
	Canvass Role	**20-Sep**	**Arrival on Sat**	**Confirmed?**	**Arrived?**	**New Leader or New Role?**	**Notes?**
	Action Lead	**Jackson**	8:30 AM	x			
	Site Coordinator	**Dan**	8:30 AM	x			
	Coaches Leads	**Garth & Jeff**	8:30 AM	x			
	Coaches Lead Support (before Sun)	**Jackson**		x			
	Photographer / Videographer	**Lourdes**					
	Trainers	**Ella**	8:30 AM	x			
		Virginia	8:30 AM	x			
		Laura	8:30 AM	x			
	Trainers Asst (timekeeper, IT)	**Steve**					
	Tech Lead (Video & Smart Phones)	**Steve**		x			
	Point person to train & place greeters	**Dan M**	8:30 AM	x			
	Greeter/welcome wagon (throughout site)	**Shannon**	9:00 AM	x			
		Julissa	9:00 AM	x			
		Jessica	9:00 AM				
	Special Guest Point Person (PP, other)	**Dave**		x			
	Sign-In Table	**Clipboards: Tempest**	9:00 AM				
		Sign-in Lead: Amy P	8:30 AM	x			
		Sign-in Assistant: Alexis	8:30 AM	x			
	Ad Player Check-out/in	**Nami Hatfield**	8:30 AM	x			
		Sky Zanz	8:30 AM	x			
	Stayback	**Alexis**	8:30 AM	x			
	Stayback	**Dan M**	8:30 AM	x			
	Stayback (back-end support)	**Staci**	1:30 PM	x			
Back-end Roles	***1st Shift Wrap-up Crew (2:30 to 3:15)***						
	"Welcome Back" Greeter (LEAD)	**Alexis**	at site				
	"Welcome Back" Greeter (CLIPBOARDS)	**Staci**	1:00pm				
	Pre-QC Station	**Dan M**	at site				
	2nd Shift Wrap-up Crew (2:55 to 3:45)		***return to site***				
	Pre-QC Station	**Virginia**	2:50 PM				
	Pre-QC Station	**Lisa Thorne**	2:50 PM				
	Full QC Station	**Steve**	2:50 PM				
	Full QC Station (start at Pre-QC if needed)	**Amy**	2:50 PM				
	Quality Control Helper/Runner	**Ella**	2:50 PM				
	Quality Control Helper/Runner	**Nami Hatfield**	3:00 PM				
	Post canvasser survey Point Person	**Julia Smith**	3:00 PM	x			
	Tally Station	Brian Bennett	3:00 PM				
	Tally Station	**Sky Zanz**	3:00 PM				
	Canvass Debriefers	**Dave**					
		Laura					
1	Pod Coach	**Sean Enloe (AM)**	8:45 AM	x			leaving early
	Assistant Coach	**Ana Sandoval**	8:45 AM	x			
2	Pod Leader	**Brittany Hirsch**	8:45 AM	x			
	Assistant Coach	**Lital Slobodsky**	8:45 AM	x			
3	Pod Leader	**Monique Perez**	8:30 AM	x			
	Assistant Coach	**Rebecca Levison**	8:45 AM	x			
4	Pod Leader	**Moises Diaz**	8:30 AM	x			
	Assistant Coach	**Edith Ramirez**	8:30 AM	x			
5	Pod Leader	**Nancy Williams**	8:30 AM	x			
	Assistant Coach	**Brian Bennett**	8:30 AM	x			
6	Pod Leader	**Yadira Sesmas**	8:45 AM	x			
	Assistant Coach	**Andrew Pask**	8:45 AM	x			
7	Pod Leader	**Gizella (AM)**	8:45 AM	x			leaving early
	Assistant Coach	**Sara Mitchell**	8:45 AM	x			
8	Pod Lead	**Craig Moseley**	8:45 AM	x			
	Assistant Coach	**Lisa Thorne (AM)-late**	10:30 AM	x			arriving late to Pod

Canvass Action Lead Planning Check list

2 Weeks Out

1. **Evaluate and Grow**
    a. Debrief previous canvass with team> make notes of changes that need to be made
        i. Conversation and recruitment numbers, Turf, Training/Debrief, Logistics and Leaders
    b.
2. **Leaders**
    a. Create Leader Role Spreadsheet for next canvass, look at projections for canvass and decide leader roles (ideally with the team)
    b. CALL TIME!!! Debrief Leaders and make asks for next leadership role schedule trainings
    c. Confirm Trainers, Debriefers, Coaches Lead and Stay Back
    d. Determine who is struggling and needs coaching, who is exceling and needs promotion
    e.
3. **Logistics**
    a. Confirm Canvass Site (# of chairs, tables, parking, AV, food)
    b. Get Safety protocol notes from Gabby
    c.
4. **Team Management**
    a. Create next canvass documents and begin updating staff canvass checklist
    b. Schedule team check-ins and leader trainings
    c. Determine who will lead confirmation call Process
    d. Think through how you can best utilize each team member next week and make sure everyone understand their priorities
    e. Reserve rooms for check-ins and such
    f. How is further recruitment happening
    g.
5. **Materials and Turf**
    a. Adjust and Create Materials
        i. Canvass Documents, Leader Spreadsheet, Scripts, Sign-in sheet, Training, Debrief, Coaches Cuddle, Coaches Checklist, and Tally Sheet.
    b. Discuss turf plan with turf coordinators and make sure we are on track for the number of doors per projections
    c.
6. **Your own leadership**
    a. Think to yourself. How can I involve volunteers in every step of this work and organize myself out of a job?
    b. What do I need to schedule this week or next to ensure that I am taking care of myself and the best for my team

1 Week Out

1. **Leaders**
    - **a.** Update leader spreadsheet and communicate with confirm call person about who is a leader and when they need to arrive
    - **b. CALL TIME!!!** Continue to Debrief Leaders and make asks for next leadership role schedule trainings
    - c. Facilitate volunteer trainings so that every vol is set up for success in their role, Make sure other staff have set up the trainings and rehearsals they need to do with their team.
    - **d.**
2. **Logistics**
    - a. Monday/Tuesday: Communicate with Confirm call lead to confirm call schedule
        - i. Review confirm call script and email
    - b. Get idea of projections from the team
    - **c.** Confirm Canvass Site again (# of chairs, tables, parking, AV, food)
    - d. Make final decision on what Safety protocols will be implemented
    - e. Make Plan for Material Prep and Groceries
    - f.
3. **Team Management**
    - a. Fill out staff Canvass Checklist and confirm staff roles
    - b. Create agendas for staff canvass check-ins, make asks for agenda items: Think about what needs to be decided as a whole group and individually
    - c. Facilitate team check-ins and leader trainings
    - d. Check in with training team, debrief team, turf team, confirm call team to ensure they have the support they need. Ask how can I support you? And help problems solve
    - e. Schedule Staff Canvass Debrief
    - f.
4. **Materials and Turf**
    - **a.** Finalize Materials by Thursday
        - **i.** Canvass Documents, Leader Spreadsheet, Scripts, Sign-in sheet, Training, Debrief, Coaches Cuddle, Coaches Checklist, and Tally Sheet.
    - b. Update on Turf Plan
    - c. Print out materials before material prep
    - d.
5. **Your own leadership**
    - a. Think to yourself. How can I involve volunteers in every step of this work and organize myself out of a job?
    - b. What do I need to schedule this week or next to ensure that I am taking care of myself and the best for my team
    - c. How am I feeling? What do I need? What help do I need?

Friday

1. Complete materials check list
2. Facilitate final canvass check-in
3. Finalize Leader Documents
    a. Run Schedule, Pod Assignment Document and Site Map Leaders Debrief
4. Make sure that leaders know what time they need to arrive and have the correct address
5. Get video on staff phones
6. Make sure the site coordinator box and the clip boards are physically with you.
7. Confirm plan for Staff Canvass debrief and follow up calls to canvassers. Schedule call time.
8. Get groceries from vol
9. Get everyone out of the office as early as possible.

05/02/15 Coaches Check List:

Pod Coach	Assistant Coach
Responsibilities: Facilitate intros, facilitate Pod Huddle 1, 2 and 3: which includes pair-up, turf distribution and materials review **Priorities**: radical hospitality, supporting volunteers & skill building, train materials	**Responsibilities**: Ask vols questions: gauge attitude and how they're feeling, be attentive to needs of vols. **Priorities**: Pair-ups and support

BEFORE TRAINING: Intros & Radical Hospitality

Intros: Collect their pink sign-in slip

☐ **Welcome every person** to your pod and facilitate intros, starting with yourself: Share your name, role and PGP and ask them to write on their heart what inspires them to be here (ask them to be specific)!

☐ **Get to know the canvassers** in your pod. Find out what motivates them to do this work

☐ **Find out how they're feeling** about canvassing today,

DURING TRAINING: 4 Puddles

(Before Training) Pod Huddle (Puddle) #1 (2 MIN) **WHAT IS ON YOUR HEART?**

☐ Prompt canvassers to pair-up and share a specific story or about a person who inspires them to canvass today.

Puddle # 2 (5 min) **INTRO ROLE PLAY: 2 min per person**

☐ **Intros**: become comfortable with opening and moving into conversation

- **Role Play 100% SUPPORTER Survey with a partner**
  - Role play up to Step 2 (Define and Humanize Transgender People)
- **Coaching Priorities:** ***Sticking to the script, confidence and tone***

Puddle # 3 (12 min) **ROLE PLAY STEPS 2 THROUGH 4: 6 min per person**

- Practice trans education and your story, as well as your curiosity and active listening skills.
- **Partner A**: Read questions off the script and listen – this is your chance to get used to the questions we'll be asking voters!
- **Partner B:** Answer the questions honestly as yourself & practice sharing your story

Coaching Priorities: SUPPORT VOLS, Give canvasser feedback to improve how they share their story in a detailed and confident way; model sharing a succinct and vulnerable story

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Puddle # 4 (7 minutes) Distribute turf, pair-up canvassers, Material Training

☐ **STEP 1: DISTRIBUTE TURF to PAIRS**

- **Pair people up and fill out the pair-up sheet and sign-in slips accordingly**
- Have canvass partners **Exchange #s** and **give yours** to pod members.
- Tell them who is going to have a videographer with them, from the sheet that comes back
- Distribute turf folder to pairs (walker A and B packets inside w/directions)
- Double check that if there are multiple people & turf in 1 car, that turfs are close together

☐ **STEP 2: Train on Materials**

☐ **TURF FOLDER: Walk Lists, Turf Map and directions**

- ☐ Going to doors on our own, with canvass buddy across the street
- ☐ Black lines separate houses, **DASHES** lines separate voters in same house
- ☐ **Refused**: Declines to talk about issue; isn't refused if just busy
- ☐ **Bad Address**: No longer lives there or is deceased
- ☐ **Not Accessible**: gate is locked, unable to enter apartment building, etc.

☐ **CLIPBOARD Materials:**

- ☐ **Script – 1 per convo; Fill out all check boxes on the script! And get best phone number**
- ☐ **Tally Sheet –** tally after every door

AFTER TRAINING: Help get canvassers out on turf as fast as possible

☐ **Make sure ALL canvassers in pod have a pen, their clipboard, turf folder and video player**

☐ Reminder for sunscreen, snack/granola bar, bathroom and water

☐ **COLLECT AND TURN IN SIGN-IN SLIPS**

AFTER CANVASSING: Debrief and Recommit Before Big Group Debrief

☐ **Facilitate Pod Debrief** (while people are eating / before big group debrief)

- **What are you most proud of from your experience today?**
- **What did you say** in your conversations that made an impact with the voter?
- **What problems or challenges did you face?** Did anyone else face that same challenge? What did you do when faced with that challenge?
- **What were some main concerns** voters had? (These came up pre or post viewing video)?
- **What did you learn** about the voter and their lived experiences?

☐ **Recommits** (before large group debrief)

ASK 1: Evening Canvass– Wednesday May 27th 4pm-9:30pm

ASK 2: Phone Bank – Tuesday and Wednesday 5th-6th 6-9pm at SAVE Office on Biscayne

- **Mark on pink/blue sign-in slip** and Turn in AFTER **final recommits** are done in big group

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4/11/15 Pod Leader/Coaches Cuddle Outline (8:55-9:15am)

I. Welcome and Intros: (5 min)

- **a.** Thank you so much for being here this morning!
- **b.** First, off who is a brand new coach? Welcome! Let's start with intros
  - **i.** Name, PGP, your role today, and a word re: how you're feeling this morning?
- **c.** Pod Assignments and Pairs
  - **i. Renzo= Pod 1 Valerie and David= Pod 2 Jax (not canvassing) and Marta= Pod 3 Aida (not canvassing) and Emily= Pod 4**

II. What is a Coach? (3 min)

- **a.** Front End
  - **i.** Responsible for a pod and helping those new volunteers feel really comfortable (likely 6-8 people per pod)
  - **ii.** Facilitate canvasser pair-ups; New/Experienced, # of cars and seats; who has videographer
  - **iii.** Help get people immediately started in the role play puddles during training. Make sure people know to show the video to **every voter**
  - **iv.** Train on materials, (walk list and tally sheet); FOLKS NEED TO KNOW HOW TO FILL OUT THE TALLY SHEET!
  - **v.** Ensure every volunteer gets 1on1 support and attention; we want to help everyone have a great experience, regardless of how their conversations go – we want these folks to come back so we can continue to grow!
- **b.** Back-end
  - **i.** Welcome canvassers back, facilitate small group debrief, AND **recommit each person for upcoming actions (fill out on their pink/blue sign in sheet)**

III. What's new about today? (3 min)

- **a.** New Turf!!! We are going to Kendall, which will be a better mix of conflicted voters and no gates!
- **b.** Our focus today is for each canvasser to hit their goal of 4 conversations. This means everyone in your pod needs to canvass on their own and you support your (new) canvass buddy to hit the goal
  - **i.** Canvassing voters in pairs reduces productivity, can intimidate voters and reduces our opportunity for learning and all improving together; we all are nervous our first time, so let's make sure we are on both sides of the street and if shadowing needs to happen, then no more than the first conversation
- **c. If you have a canvasser who is NOT ready to canvass on their own, we can have them help out as a videographer**

d. Remember to get recommits on the pink/blue slips after the canvass so that we know who is signed up.

IV. Walk Through Coaches checklist (7 min)

- **a.** Each of our pods will be prepared with chairs for 6 canvassers – so depending on how many people show up today, you will likely have between 4-8 people in your pod, including yourself and your other coach
- **b.** Briefly review goals for each puddle
- **c.** Note that the pod leader and secondary coach can divide up responsibilities as you see fit, depending on comfort level and what you want to do
  - **i.** Make sure to **check in with one another** to figure out what parts you each want to facilitate vs. shadow vs. share
  - **ii. Give each pair 2 minutes to organize their responsibilities**
- **d. REMEMBER AFTER TRAINING**: Please turn in your pods pink/blue sign-in slips to Kelsey

V. Any questions? Please go mingle and get folks to get into their pods and make sure that one person is in your Pod at all times

- **a.** Have energy! We set the tone as leaders and want everyone to have fun! Smile!

Introduction & First Rating

Hi, _____? I'm _____, a volunteer with SAVE. We're talking to voters in your neighborhood about a law that passed last year to include transgender people in our nondiscrimination ordinance. This law is now at risk of getting taken away.

With the information that you have, would you vote in favor or against including transgender people in our non-discrimination laws?

☐ Against ☐ Undecided / I don't know ☐ In Favor

On this 0-10 scale, where 0 is 100% sure you'd vote against including transgender people in non-discrimination laws and 10 is 100% sure you'd vote in favor, **where would you put yourself?**

0	1	2	3	4	5	6	7	8	9	10
Against					**←Undecided →**					**In Favor**

Why is that the right number for you?

Step 1: Show Video & Uncover Voter's True Feelings

It can be hard to understand what it means to be transgender, especially if you've never met a transgender person. Some are opposed to these laws. Here's a short video that gives more information. **[Show video to every single voter]**

Now that you have seen that video, where 0 is 100% sure you'd vote against including transgender people in non-discrimination laws and 10 is 100% sure you'd vote in favor, **where would you put yourself?**

0	1	2	3	4	5	6	7	8	9	10
Against					**← Undecided →**					**In Favor**

[Below a 10] **What is on either side of the issue for you? Why is that the right number for you?**
[If 10] **What does this video make you think about?** Do you know anyone who's not comfortable with transgender people? What do they say? What do you say to them?

Step 2: Define Trans & Uncover Voters Experience w/ LGBT

As you saw in the video,Rodrigo is a transgender man. When he was born, his parents assumed he was a girl, but he knew from a young age he is a boy.

Do you know anyone transgender? ☐ NO ☐ YES

If NO - *Doesn't Know Someone*

- **What do you think about Rodrigo and his mom?** Tell me more about that? Do you think Rodrigo is a man?
- **Do you know anyone gay or lesbian?** How do you know them?
  - How did you know they were gay? What was that like for you? How are they treated?

If YES – *They Know Someone*

- How do you know them? What is their name? How are they doing?
- What was it like for you to learn that they are transgender? How did you feel? How have your feelings changed?

****SHARE YOUR JUDGMENT STORY ****

I don't identify as transgender but I have felt judged by the way that people perceived me…
This one time… (come out, be vulnerable: tell story re: race, economic status, gender)

Step 3: Uncover Voter's Real Experience w/ Judgment

The reality is judgment happens to everyone at some point, and it hurts. Can you tell me about a time when you have felt judged or were treated differently for who you are (race, language, economic status).

If no, have you witnessed this kind of judgment? When? What was that like for you?

Tell me more…
What happened?
How did you feel about that?
Why?

This law is important because it **gives us a chance to think about how we treat people who may look different from what we expect (in this case, transgender people).** What do you think about that?

****SHARE *YOUR* STORY to Help the Voter Identify with Trans People****

My friend____ is transgender/GNC, which means… and this one time…
What does my story make you think about?

Step 4: Address Concerns

Earlier you mentioned_____ as a concern? What is on your mind now? What are you picturing will happen?

I think because so many people don't know someone who is transgender, a lot of questions and concerns can come up that aren't rooted in reality.

For my friend _____…*Share a story of the reality your friend faces when needing to use the restroom*

Thinking back to the video, what bathroom do you think Rodrigo should be using? Why?

- The reality is not all transgender people look like Rodrigo. For some transgender/GNC people, using a public restroom can be scary because they fear for their own safety.
- All of us, including transgender people care about bathroom privacy and safety for everyone.
- These protections have been implemented successfully in 17 states and Broward County with no increase in public safety incidents

MAKE THE CASE

- I think transgender-inclusive laws like these need to be legal everywhere because…

WRAP UP: FINAL RATING

Now that we've been talking about this, if you were to vote on this law tomorrow to include transgender people in our nondiscrimination law, would you vote in favor or against?

☐ Against ☐ Undecided ☐ In Favor

To finish up on this 0-10 scale, where 0 is 100% sure you'd vote against this law and 10 is 100% sure you'd vote in favor of this law, **where would you put yourself?**

0	1	2	3	4	5	6	7	8	9	10
Against					**←Undecided →**					**In Favor**

[If moved] Why is that the right number? What makes you rate yourself differently?

[If 10] It sounds like supporting transgender people is important to you. We may be voting on this law in November. Can you think of anyone you'd talk to about our conversation?

BEST PHONE NUMBER: What's the best number to reach you at? **Write on walk list**

Introducción & Escala Inicial

Hola, ¿usted es _____? Yo me llamo _____, y soy un(a) voluntario/a de SAVE. Estamos hablando hoy con votantes en su vecindario sobre una ley que fue aprobada el año pasado que incluye a las personas transgénero en las leyes anti-discriminatorias de Miami. Actualmente esta ley está en peligro de ser revocada.

Con la información que conoce hasta ahora, ¿usted votaría a favor o contra de incluir a personas transgénero en nuestras leyes anti-discriminatorias?

☐ En Contra ☐ Indeciso / No Sabe ☐ A Favor

Usando esta escala de 0-10, donde 0 es 100% seguro de que usted votaría en contra de incluir a personas transgénero en esta ley, y 10 es 100% seguro de que votaría a favor, **¿con qué numero se identificaría?**

0	1	2	3	4	5	6	7	8	9	10
En Contra					**←Indeciso →**					**A Favor**

¿Por qué se identifica con este número?

Paso 1: Enseñar Video & Descubrir Verdaderos Sentimientos del Votante

Puede ser dificil entender lo que significa ser transgenero, especialmente si nunca ha conocido a alguien transgenero. Alguno se han opuesto a estas leyes . Aqui tenemos un video corto da mas informacion. ***[Enseñar video a cada votante.]***

Ahora que ha visto el video, donde 0 es 100% seguro de que usted votaría en contra de incluir a personas transgénero en esta ley, y 10 es 100% seguro de que votaría a favor, **¿con qué numero se identificaría?**

0	1	2	3	4	5	6	7	8	9	10
En Contra					**←Indeciso →**					**A Favor**

[Menos de 10] **¿Qué hay en ambos lados del tema para usted? ¿Por qué se identifica con este número?**
[Si 10] **¿Qué le hace pensar el video?** ¿Conoce a alguien que no esta cómodo con personas transgénero? ¿Qué dicen? ¿Qué les dice usted a ellos?

Pasó 2: Definir Transgénero & Descubrir Experiencias de Votante con LGBT

Como vio en el video, Manuela es una niña transgenero. Cuando ella nacio, sus padres asumieron que era niño, pero ella supo desde pequeña que es niña.

Conoce a alguien transgenero? ☐ NO ☐ SI

NO – *No conoce a Nadie*

- **¿Qué piensa de Manuela y sus padres?** Cuenteme mas.¿Usted cree que Manuela es una niña?
- **¿Conoce a alguien gay o lesbiana?** ¿Cómo los conoce?
  - ¿Cómo supo que son gay/lesbiana? ¿Cómo se sintio cuando se entero? ¿Cómo tratan a su amigo/a?

Sí– *Conocen a Alguien*

- ¿Como lo/a conoce? ¿Cómo se llaman? ¿Cómo les va?
- ¿Como fue para usted saber que él/ella es transgénero? ¿Como se sintió? ¿Cómo han cambiado sus sentimientos?

****COMPARTE TU HISTORIA DONDE HAS SIDO JUZGADO/A****

Yo no me identifico como transgénero pero me he sentido juzgado/a basado en la manera que personas me pueden percibir. **Una vez… (Sal del closet, se vulnerable: cuenta historia re: raza, estatus económico, genero, idioma)**

Pasó 3: Descubrir Experiencias Verdaderas de Votante siendo Juzgado/a

La realidad es que todos somos juzgados en algún momento, y duele. Cuénteme de alguna vez donde usted haya sido juzgado/a o fue tratado/a de manera diferente por ser quien es (raza, idioma, estatus económico).

[Si no] ¿Alguna vez ha visto a alguien siendo juzgado? ¿Cuándo? ¿Cómo fue eso para usted?

Cuénteme más…
¿Qué paso?
¿Qué sintió usted sobre eso?
¿Por qué?

Esta ley es importante porque **nos da la oportunidad de pensar cómo queremos tratar a las personas que pueden verse diferente a la que nosotros esperamos (en este caso personas transgénero).** ¿Que piensa usted sobre eso?

****COMPARTE TU HISTORIA para ayudar al votante a identificarse con personas transgénero****

Mi amigo/a ____ es transgénero/alguien que no se conforma con las expectativas de su género. Eso significa que… Hubo una vez… ¿Qué le hace pensar mi historia?

Pasó 4: Hablar Sobre Preocupaciones

Al principio usted menciono _____ como una preocupacion. ¿Qué piensa ahora? ¿Qué se imagina que puede pasar?

Porque hay tantas personas que no conocen a alguien transgenero personalmente, se presentan muchas preguntas o preocupaciones que no son basadas en realidad.

Para mi amigo/a _____... ***Comparte una historia de la realidad que la personas que tu quieres transgenero necesita usar el baño*** o ***compare una historia de tu realidad al usar en baño.***

Acordándose del primer video ¿que baño cree que deberia usar Manuela? ¿Por que?

- **A todos, incluyendo a las personas transgénero, nos preocupa la privacidad y seguridad dentro de los baños públicos.**
- Estas protecciones han sido implementadas en 17 estados y el condado de Broward sin ningún incidente.
- La realidad es que no todas las personas transgénero se parecen a Rodrigo. Para alguna personas transgénero, usar un baño publico les puede dar temor porque les preocupa de seguridad.

HACER EL CASO

- Yo creo que necesitamos leyes que incluyen a personas transgénero porque…

TERMINAR: PUNCTUACIÓN FINAL

Ahora que hemos hablado sobre esto, si usted fuera a votar mañana para incluir a personas transgénero en nuestras leyes anti-discriminatorias, ¿votaría a favor o en contra?

☐ En Contra ☐ Indeciso ☐ A Favor

Para terminar en esta escala de 0-10, donde 0 es 100% seguro de que usted votaría en contra de esta ley, y 10 es 100% seguro de que votaría a favor, **¿con qué numero se identificaría?**

0	1	2	3	4	5	6	7	8	9	10
En Contra					**←Indeciso →**					**A Favor**

[Si hubo cambio] ¿Por qué se identifica con este número? ¿Que le hizo cambiar de puntuación?
[Si se califico 10] Parece que apoyar a personas transgénero es algo importante para usted. Es probable que esta ley este en la boleta electoral en el futuro, ¿hay alguien en su vivienda con quien pudiera hablar de este tema?

Muchas gracias por haber tenido esta conversación conmigo. Muchas gracias por haber tenido esta conversación conmigo.

MEJOR NÚMERO TELEFONICO: ¿Cual es el número de teléfono donde prefiere ser contactado? ***Escribir en la lista (Walk List).***

Introduction & First Rating

Hi, _____? I'm _____, a volunteer with SAVE. We're talking to voters in your neighborhood about a law that passed last year to include transgender people in Miami's nondiscrimination ordinance. That law is now at risk of getting taken away.

With the information that you have, would you vote in favor or against including transgender people in our non-discrimination laws?

☐ Against ☐ Undecided / I don't know ☐ In Favor

To be more specific, on this 0-10 scale, where 0 is 100% sure you'd vote against including transgender people in non-discrimination laws and 10 is 100% sure you'd vote in favor, **where would you put yourself?**

0	1	2	3	4	5	6	7	8	9	10
Against					**←Undecided →**					**In Favor**

Why is that the right number for you?

Step 1: Show Video & Uncover Voter's True Feelings

It can be hard to understand what it means to be transgender, especially if you've never met a transgender person. Some are opposed to these laws. Here's a short news clip video that gives more information. **[Show video to every single voter]**

Now that you've seen that video, where 0 is 100% sure you'd vote against including transgender people in non-discrimination laws and 10 is 100% sure you'd vote in favor, **where would you put yourself?**

0	1	2	3	4	5	6	7	8	9	10
Against					**← Undecided →**					**In Favor**

[Below a 10] **What is on either side of the issue for you? Why is that the right number for you?**
[If 10] **What does this video make you think about?** Do you know anyone who's not comfortable with transgender people? What do they say? What do you say to them?

Step 2: Define Trans & Uncover Voters Experience w/ LGBT

What came to mind when you saw Rodrigo and heard his experiences? How does this match up to what you've been told or heard about transgender people?

I'm out here today because I'm transgender/ gender non-conforming which means…
and it's important to me that these non-discrimination laws protect me because…

Do you know anyone transgender? ☐ NO ☐ YES

No- *Doesn't Know Someone*	**Yes- *They Know Someone***
• So I'm the first transgender person you've met. That's exciting! • **What do you think about Rodrigo? How do you feel listening to his mom? Tell me more about that?** • **Do you know anyone gay or lesbian?** How do you know them? Who do you know best? How'd you learn they're gay?	• How do you know them? What's their name? • What was it like for you to learn that they're transgender? How did you feel? • What do they like to do? What pronouns do they use (He, She, Etc.)?

***** Share a story of how you 'came out' to yourself as transgender/GNC *****

Who supported you when you first came out? Who supports you now? What is it like for you to feel supported? Why is being supported important to you? **What does my story make you think about?**

Step 3: Uncover Voter's Real Experience w/ Judgment

The reality is judgment happens to everyone at some point, and it hurts. Can you tell me about a time when you have felt judged or were treated differently for who you are (race, language, economic status).

If no, have you witnessed this kind of judgment? When? What was that like for you?

Tell me more…
What happened?
How did you feel about that?
Why?

This law is important because it **gives us a chance to think about how we treat people who may look different from what we expect (in this case, transgender people).** What do you think about that?

****SHARE *YOUR* STORY of Feeling Judged****

This one time... **… (**be vulnerable, paint a picture) **What does my story make you think about?**

Step 4: Address Concerns

Earlier you mentioned_____ as a concern? What is on your mind now?
What are you picturing will happen?

I think because so many people don't know someone who is transgender, a lot of questions and concerns can come up that aren't rooted in reality. I understand that, but my experience…

- Thinking back to the video, what bathroom do you think Rodrigo should be using? Why?

All of us, including transgender people, care about bathroom privacy and safety. Nothing in this law changes the fact that it is illegal to enter a restroom to harm others –**What are you picturing will happen?**

- These protections have been implemented successfully in 17 states and Broward County with no increase in public safety incidents

MAKE THE CASE

- I think we need transgender-inclusive laws because…

WRAP UP: FINAL RATING

Now that we've been talking about this, if you were to vote tomorrow on this law that includes transgender people in our nondiscrimination ordinance, would you vote in favor or against?

☐ Against ☐ Undecided ☐ In Favor

To finish up on this 0-10 scale, where 0 is 100% sure you'd vote against this law and 10 is 100% sure you'd vote in favor of this law, **where would you put yourself?**

0	1	2	3	4	5	6	7	8	9	10
Against					**←Undecided →**					**In Favor**

[If moved] Why is that the right number? What makes you rate yourself differently?
[If 10] It sounds like supporting transgender people is important to you. This might be on the ballot in the future, is there anyone in your household you can talk to about this?

BEST PHONE NUMBER: What's the best number to reach you at? **Write on walk list**

Introducción & Escala Inicial

Hola, ¿usted es _____? Yo me llamo _____, y soy un(a) voluntario/a de SAVE. Estamos hablando hoy con votantes en su vecindario sobre una ley que fue aprobada el año pasado que incluye a las personas transgénero en las leyes anti-discriminatorias de Miami. Actualmente esta ley está en peligro de ser revocada.

Con la información que conoce hasta ahora, ¿usted votaría a favor o contra de incluir a personas transgénero en nuestras leyes anti-discriminatorias?

☐ En Contra ☐ Indeciso / No Sabe ☐ A Favor

Usando esta escala de 0-10, donde 0 es 100% seguro de que usted votaría en contra de incluir a personas transgénero en esta ley, y 10 es 100% seguro de que votaría a favor, **¿con qué numero se identificaría?**

0	1	2	3	4	5	6	7	8	9	10
En Contra					**←Indeciso →**					**A Favor**

¿Por qué se identifica con este número?

Paso 1: Enseñar Video & Descubrir Verdaderos Sentimientos del Votante

Puede ser dificil entender lo que significa ser transgenero, especialmente si nunca ha conocido a alguien transgenero. Alguno se han opuesto a estas leyes . Aqui tenemos un video corto da mas informacion. ***[Enseñar video a cada votante.]***

Ahora que ha visto el video, donde 0 es 100% seguro de que usted votaría en contra de incluir a personas transgénero en esta ley, y 10 es 100% seguro de que votaría a favor, **¿con qué numero se identificaría?**

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En Contra					**←Indeciso →**					**A Favor**

[Menos de 10] **¿Qué hay en ambos lados del tema para usted? ¿Por qué se identifica con este número?**
[Si 10] **¿Qué le hace pensar el video?** ¿Conoce a alguien que no está cómodo con personas transgénero? ¿Qué dicen? ¿Qué les dice usted a ellos?

Pasó 2: Definir Transgénero & Descubrir Experiencias de Votante con LGBT

¿Que penso cuando vio a Manuela y conocio sus experiencias? ¿Como se compara esto con lo que le han dicho o lo que ha escuchado de personas transgenero?

Estoy aqui hoy porque yo soy transgenero/no me siento conforme con las normas/expectativas de mi genero. Eso significa que...
Y es importante para mi que esta leyes anti-discriminatorias me protegan porque...

Conoce a alguien transgenero? ☐ NO ☐ SI

NO – *No conoce a Nadie*	**Si- Si conoce a alguien**
• Entonces soy la primera persona transgenero que conoce. ¡Que emocionante! • **¿Qué piensa de Manuela? ¿Cómo se sintio escuchando a sus padres? Cuenteme mas.** • **¿Conoce a alguien gay o lesbiana?** ¿Cómo los conoce? ¿A quien conoce mejor? ¿Cómo se entero que son gay/lesbiana?	• ¿De dónde lo/a conoce? ¿Cómo se llaman? • ¿Como fue para usted al aprender que son transgénero? ¿Cómo se sintió? • ¿Que les gusta hacer? ¿Que pronombres usa (el/ella)?

***** Comparte tu historia personal de como "saliste del closet" a ti mismo* como transgénero****

¿Quien te apoyo cuando primero saliste del closet? ¿Quien te apoya ahora? ¿Como te hace sentir tener ese apoyo? ¿Por que te parece importante tener ese apoyo? **¿Que le hace pensar mi historia?**

Pasó 3: Descubrir Experiencias Verdaderas de Votante siendo Juzgado/a

La realidad es que todos somos juzgados en algún momento, y duele. Cuénteme de alguna vez donde usted haya sido juzgado/a o fue tratado/a de manera diferente por ser quien es (raza, idioma, estatus económico).

[Si no] ¿Alguna vez ha visto a alguien siendo juzgado? ¿Cuándo? ¿Cómo fue eso para usted?

Cuénteme más…
¿Qué paso?
¿Qué sintió usted sobre eso?
¿Por qué?

Esta ley es importante porque **nos da la oportunidad de pensar cómo queremos tratar a las personas que pueden verse diferente a la que nosotros esperamos (en este caso personas transgénero).** ¿Que piensa usted sobre eso?

****COMPARTE TU HISTORIA Siendo Juzgado/a****

Hubo una vez… (Se vulnerable, ser detallado/a y presentar panorama general) **¿Qué le hace pensar mi historia?**

Pasó 4: Hablar Sobre Preocupaciones

Al principio usted menciono _____ como una preocupacion. ¿Qué piensa ahora? ¿Qué se imagina que puede pasar?

Porque hay tantas personas que no conocen a alguien transgenero personalmente, se presentan muchas preguntas o preocupaciones que no son basadas en realidad. Yo entiendo eso, pero en mi experiencia…

- Pensando en el video, ¿qué baño cree usted que deberia usar Manuela? ¿Por qué?

A todos, incluyendo a las personas transgénero, nos preocupa la privacidad y seguridad dentro de los baños públicos. Nada de esta ley cambia el hecho que es ilegal entrar al baño para lastimar a otros. **— ¿Qué se imagina que puede pasar?**

- Estas protecciones han sido implementadas en 17 estados y el condado de Broward sin ningún incidente.

HACER EL CASO

- Yo creo que necesitamos leyes que incluyen a personas transgénero porque…

TERMINAR: PUNCTUACIÓN FINAL

Ahora que hemos hablado sobre esto, si usted fuera a votar mañana para incluir a personas transgénero en nuestras leyes anti-discriminatorias, ¿votaría a favor o en contra?

☐ En Contra ☐ Indeciso ☐ A Favor

Para terminar en esta escala de 0-10, donde 0 es 100% seguro de que usted votaría en contra de esta ley, y 10 es 100% seguro de que votaría a favor, **¿con qué numero se identificaría?**

0	1	2	3	4	5	6	7	8	9	10
En Contra					**←Indeciso →**					**A Favor**

[Si hubo cambio] ¿Por qué se identifica con este número? ¿Que le hizo cambiar de puntuación?
[Si se califico 10] Parece que apoyar a personas transgénero es algo importante para usted. Es probable que esta ley este en la boleta electoral en el futuro, ¿hay alguien en su vivienda con quien pudiera hablar de este tema?

Muchas gracias por haber tenido esta conversación conmigo.

MEJOR NÚMERO TELEFONICO: ¿Cual es el número de teléfono donde prefiere ser contactado? ***Escribir en la lista (Walk List).***

5/2/15 -Power Summit Canvass Sign-In

Name: _____

Cell: _____

Email: _____

For Sign-in/Pod Leader Team to Fill out:

☐ English Canvasser(pink) ☐ Spanish Canvasser(blue)

☐ Videographer(white) ☐ Phone Banker/StayBack(Yellow)

Leader Today? Y / N Role: _____

Pod # _____

1st time canvassing us? Yes / No

Driver today? Yes /No **# seats** _____

Smart Phone? Yes/no

Did you download the video clip? Yes /No

Spanish Speaker? Yes/No

Person of Faith? Yes/No

Volunteers, Please Fill Out for Research Purposes:

I identify as: *(check all / any that apply to you)*

Orientation: ☐ Gay ☐ Lesbian ☐ Bisexual ☐ Straight

☐ Queer ☐ Questioning ☐ Pansexual ☐ Asexual

Other:

Do you identify as Trans or Gender Non-conforming?

Yes/No

Live in Florida? Sign up for What's Coming up!

☐ Test Canvass, Wednesday May 27th 5-9:30pm

☐ Research Canvass Saturday June 6th 8am-3pm

☐ Research Canvass Saturday June 20th 8am-3pm

Race/Ethnicity: ☐ White ☐ Black ☐ Latino/a/Hispanic ☐

☐ Native Amer. ☐ Middle East. ☐ Other:

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☐ Native Amer. ☐ Middle East. ☐ Other:

Power Summit Canvass – Tally Sheet

Name:	Date: 5/2/15	Pod #:	Turf #:

Doors Knocked	Refusals	Full Conversations (3 ratings)	Partial Convos *Ended before final rating*	End Rating Supportive / 7-10 (In Favor)	End Rating Undecided / 4-6 (Undecided)	End Rating Unsupportive / 0-3 (Against)

Total Moved	Start 0-3 → End 4-6	Start 0-3 → End 7-10	Start 4-6 → End 7-10

Site Stay-back and Safety lead: Belky 207-217-7183 **Your Buddy's Name & Number:**

Notes:

SAVE Canvass – Tally Sheet

Name:	Date: 5/2/15	Pod #:	Turf #:

Doors Knocked	Refusals	Full Conversations	Partial Convos *Ended before final rating*	(Only Final Rating) Supportive / 7-10 (In Favor)	(Only Final Rating) Undecided / 4-6 (Undecided)	(Only Final Rating) Unsupportive / 0-3 (Against)

Total Moved	Start 0-3 → End 4-6	Start 0-3 → End 7-10	Start 4-6 → End 7-10

Site Stay-back lead: Belky 207-217-7183 Your Buddy's Name & Number:

Extra Tally for Video Canvassers

Total Convos Released:		Total Refused to be on film:	

Videographer's Name:	Camera Label:

Voter Name	Van ID	Ratings			Moved?	Spanish?	Released?	Time (check one)	High Priority? Other notes
		1st	2nd	3rd					
								[ ] <15 min [ ] 15-30 m [ ] >30 min	
								[ ] <15 min [ ] 15-30 m [ ] >30 min	
								[ ] <15 min [ ] 15-30 m [ ] >30 min	
								[ ] <15 min [ ] 15-30 m [ ] >30 min	
								[ ] <15 min [ ] 15-30 m [ ] >30 min	

Stay Back Canvasser Safety and Support Plan

Hello, this is ___ your stay back safety and support team. Can you tell me your name? How are you?

How can I best support you? How are you feeling right now?

1. If logistics question, go to topics below
2. **Can you describe what happened? Can you describe where you are? – Are you able to move down the street from the incident?**
    a. Document incident on word document
3. **Can you describe where your canvass partner is?**
4. **Can you tell me more about how are you feeling right now? Tell me more?**
5. **My goal is to support you in the way that feels best to you. What do you feel like you need right now? Do you need to come back to the site? Do you need to take a deep breath and keep going?**
    a. If they want to keep canvassing tell them to move to the next street, if they need to come back to the canvass site, let them.
    b. If you would like to come back to the canvass site, do you need someone to come get you?
    c. What address are you at?
6. **Is there any thing else I can do?**

○ **Questions**

- **Q: I finished my walk list, what do I do?**
    - A: Great job! Go to the beginning of your turf and re-walk it - go back to the voters who weren't home.
- **Q: My video player is not working or I forgot one?**
    - A: Do you have email on your phone? The canvass confirmation email that Justin sent has the video in it and you can download it.
    - No? What's your email; I can send it to your phone right now.
    - If that doesn't work. are you close to the canvass site? If close to canvass site, come back to the canvass site and get one. If far away just don't use video
- **Q: A cop was called on me?**
    - How are you feeling right now? What do you need?
    - Don't panic, this happens. You are not doing anything illegal, you are not selling anything.

- Ideally, don't let waiting for the police slow you down. Keep going as normal, and talk to the cop if/when they arrive and stop you.
- Tell the cop who you are and what you are doing in the field today. Move on to the next street.
- Give the cop our number if you need to: XXX-XXX-XXXX.

- **Q: The press wants to talk to me:**
  - Tell them "no comment" and have them call XXX-XXX-XXXX

☐ **If there is any incident where a canvasser feels unsafe or a gun was involved Call Ella Barrett immediately 503-502-6673**

Stay Back Checklist for Belky

Call Ella at 503-502-6673 if you have any questions

☐ **Answer phone calls from canvassers in the field and use the above script.**

☐ **Enter Pink Sign-in Slips into Tally spreadsheet**
- ☐ Using sign-in slips (or pod pair-up rosters) enter canvassers' name, turf and pod into master tally sheet (Master tally sheet is a tab in the canvass Documents excel file on the staff laptop
- ☐ Paper clip and return sing in slips (Pink) to the correct pod so that coaches can recommit volunteers

☐ **Order pizza @ 12:30 pm to be delivered at 2:30pm**
- ☐ Number of people @ the canvass (divided by) 4 = number of large pizzas
- ☐ Get variety of cheese, pepperoni, and veggie
- ☐ Staff member will provide Amex
- ☐ Call pizza hut @ 305 552 1700
- ☐ Deliver to 885 S.W 109th Ave, Miami Fl 33199,
  - MARC builing (MARC stands for Manangement and Advanced Research Center)

☐ Everyone should be back at 2:45 pm, but leaders should be back by 2:30pm

Stay Back Checklist for Nat

- **Support Belky in any way that she needs**
- **Set-up for Welcome Back Process (see back end site map)**
  - Canvasser on Film Station
  - Materials Breakdown Station= Pod Assignment Table
    - Make a station for clipboards and blank forms
  - Quality Control Station
    - Put up a sign and need 2 chairs
  - Set up Tally Station
    - Set up Ella's Laptop for Tally
  - Video player check-out now becomes video player check-in

- **Clean the training room and make sure pods numbers on back on the chairs**

- **If Belky needs someone to go out into the field to help a canvasser, go out into the field.**

- **Set up food pizza and drinks**

- **Create/ put up welcome back signs!**

- **Warmly greet canvassers on their way back and person materials breakdown station**

6/6/15 CANVASS TRAINING OUTLINE

Total Time of Training: 1h 15m

SECTION I: CONTEXT & CONVO OVERVIEW (10 min)

WELCOME AND INTROS (3 min) - *Helen*

- GOOD MORNING EVERYONE! Welcome and thank you for being here today for SAVE's canvass against transphobia!!
- Who's here: SAVE and the LAB (from the Los Angeles LGBT Center) + ACLU (FL & TX)
- But the biggest source of power in this room today is YOU.
  - Who has never come to a SAVE canvass before? Welcome!
  - Who has volunteered with us to win TransEquality at a phone bank, canvass, a committee hearing, or something else? Welcome Back!!
- **Trainer intros w/Pronouns- Credential yourself and why we say our PGP's**

CONTEXT / URGENCY: (3 min) *AJ*

A little background: - (1 min)

- Countrywide problem: In 31 states, there's no state law to keep someone from being fired just because they're transgender or gender non-conforming
- Until recently, County law here in Miami said you couldn't discriminate against people based on race, religion, age, as well as gay or lesbian folks.
  - Trans/GNC people were NOT on that list, so it was 100% legal to be fired, evicted, or kicked out of a public place just because you are transgender or gender non-conforming
- Lucky for us, last December, SAVE got Miami-Dade's county commission to update Miami's policy to include "gender identity" and "gender expression", meaning, they added transgender to the list.
  - This new law went into effect January 7th. Right now, trans and GNC folx are protected!!

What we're up against (here and around the country) - (1 min)

- Our opposition knows how to win!
  - They win over 50% of the time by tapping into voters' transphobia and prejudice
  - Our opposition just did this and BEAT US in Springfield, Missouri a couple months ago! We lost by 850 votes, although polls showed us ahead almost the whole time.
  - We know our voters here in Miami also have plenty of room to grow, in terms of their support for transgender and gnc people, and we need to learn how to get them on our side
  - Today, we are working to figure out how to protect equality for Trans/GNC folx, so the same thing doesn't happen here and so we can share what we learn to battles everywhere

SCRIPT OVERVIEW (2 min) LAURA

Today we will seek out conflicted voters and those our opposition targets, and have a personal conversation with them

- Intro – Rating + Video
  - We'll introduce the law and ask the voter to give us their honest, initial reaction.
  - We'll start off the convo by showing a video to EVERY single voter today

- Real Lived Experiences Mode – 2 "Themes"/Topics:

  - Shift from survey mode into a more personal conversation in which the voter and we will discuss our real experiences
  - The GOAL of this section: get voter out of a hypothetical place full of assumptions and stereotypes, and into a real and personally vulnerable place
    - We will do this by not only talking about trans/GNC people, but also talking about all LGBT people and experiences with judgment in general

- Revisit concerns and make the case:
  - AFTER you've talked about real experiences, go back to the concerns that came up earlier – find out more about them and address them.
  - This is also an opportunity for us to be assertive – we don't want to leave the door without making sure to explain why we care about this.

- CLOSING – Final Rating and best phone #

SCRIPT BREAK (2 min) **LG**

- THE SCRIPT IS A GUIDE – We don't want to read off our scripts robotically, but we do want to be familiar with it. We're having real conversations – each one will be different.
- Take 2 min right now to read over it. (This is not the time for a bathroom break or to grab food.)
  1. Note: We've given you four different scripts on your clipboard – two for trans/GNC folks, one in English and one in Spanish, and another for allies (also in English and Spanish). Read over one you feel most comfortable with, and at the end of the training you'll pick up more copies of whichever script is the right one for you!
  2. NOTE: This script is not the same as the last, so experienced canvassers read it over too!

SECTION II: INTRO & VIDEO (15 min, including 4 min video) Helen

- The key to having a successful conversation with ANY voter is building rapport and setting the tone, and this needs to be done from the very beginning!
- Instead of trying to tell you what this is all about, let's take a look at a real conversation!

SHOW VIDEO #1: Ella & Arti

DEBRIEF – Getting the Conversation Started: (2 min)

- There are some simple things we can do in the first 30 seconds of our conversations to increase our success as well as a few pitfalls to avoid: Why do we need these tips?
  - If we have a voter in front of us, we want to do everything in our power to talk to them!
- Keys to Success (**Refer to video as example of what to do)**
  - Dive right into the conversation without waiting for their permission to talk
    - Smile and make eye contact (TAKE OFF SUNGLASSES)– we're not robots!
    - Assume friendliness from ALL voters; they'll follow our lead, so be confident and set tone; (fake it 'til you make it if you have to!)
    - Non-Judgmental Tone –make it clear we're not there to judge them and we're curious about their honest opinion
- Pitfalls to Avoid **(Role play: Voter = _____Canvasser = _____)**
  - Most important to avoid: Asking permission to have convo (i.e. "Do you have a minute?")
    - If we treat having this conversation, and showing the video, as the most natural thing in the world, the voter will treat it that way too.
    - **[Trainers role play example of Bad then Good Video Asks to model difference]**

- INTRO AND VIDEO CLIP REMINDERS: (3 min) AJ
  - STICK TO THE SCRIPT (for this section) – We have made the language specific to make it likely the voter will talk to us and won't hesitate to view the video.
  - USE RATING SCALE: It is a helpful tool for us, NOT the final indicator of how the voter feels
    - Almost all 10's are still conflicted voters who have misconceptions and transphobia!
    - Beware the "discrimination declaration"
  - THE VIDEO CLIP is an example to use as a starting off point and teaching tool that is real for voters, and helps us gauge where they're at
    - We know that many of the voters we talk to may MOVE BACKWARDS when they see this video – that's ok! Don't be disheartened! In fact, this is helpful for us, because it shows us where they are REALLY at, so we can have a more honest conversation
    - We recognize these stories are very binary and gendered, and are NOT representative of all experiences of Trans/GNC people
  - So, you just saw the English-speaking video clip we're showing voters, so now we're going to show **(VIDEO 2)** the clip we'll be showing Spanish-speaking voters!

PUDDLE #1 – ROLE PLAY INTRO & SHOWING VIDEO (5 min total) - Laura

- You're all in a Pod right now, and when your pod has a "huddle" = Puddle!
- We'll have a few throughout the training so you can practice and check in with your groups, which include your coaches who are in charge of each pod & puddle!
- Now it's your turn. Your coach will help you pair up with someone in your pod and BOTH OF YOU will take turns practicing the introduction up through showing the video. You'll have 2 min each.
  - This is your chance to read off the page and get used to the words
  - Practice showing the video (don't actually play it, just mimic it!)
- If you speak Spanish, try your role-plays today in Spanish!

SECTION III: REAL LIVED EXPERIENCE (15 min, including 4 min of video)

FIRST COMES EDUCATION Laura (1 min)

- We're going to dive into the next part of our conversations in which we switch gears from a more scripted to a more personal and flexible conversation
- After getting their reaction to seeing Rodrigo or Manuela, we want to make sure the voter is on the same page as us about what it means to be transgender
  - Only 1 in 10 voters know someone who is transgender, and many voters have a lot of assumptions or stereotypes

THEN COMES VOTER'S REAL LIVED EXPERIENCES (5 min w/video)

- Our ULTIMATE GOAL is to elicit a story/experience that matters to the voter emotionally and will create a connection - **We can't give up on looking for this story**
- Here are a couple examples: **SHOW VIDEO 3: Steve & Elba (1 min)& VIDEO 4: Laura & Brooke (2 ½ min)**
  - Pause after voter shares story in 2nd video to ask group what questions could be asked

- WHY Real Lived Experience??
  - Discussing hypothetical situations and theories get us nowhere – They'll never rethink their views if the conversation stays here, even though it's where they are most comfortable!
  - Talking about our experiences creates a real opportunity to connect with a voter on an emotional and personal level – our goal!

  - Underneath the story is a feeling and underneath the feeling is this knowledge/belief that they don't want to see somebody they love be treated badly just because they look different or don't fit in
- WHAT Real Lived Experiences?
  - Ideally we'd be discussing voter's real experience with someone who is transgender or gender non-conforming, but what's more likely is an experience with someone in their life who is gay or lesbian
  - We then want to discuss their own experience with judgment and being treated differently
  - They need to understand there is a human being at stake, even if they don't personally know them, (it may be Rodrigo/Manuela or someone we know or us)
- **Caitlyn Jenner –** use this if they bring it up! Ask about their reaction and FEELING about it; learn from their RLE, but know that it's not the most useful as they don't really care about her in the same way as a loved one – she may help you get to a story of a loved one though

CURIOSITY & LISTENING: (2 min) Helen

Our goal is to get to an experience with emotional weight, in which the voter is being vulnerable with us - How do we do that? How do you get a voter to talk about their feelings?

- Be CURIOUS and ask about the voter's experiences – 1 question IS NOT enough!
  - DIG DEEPER – Don't stop at the surface level questions, ask more follow-up questions!
  - ASK OPEN-ENDED QUESTIONS – we don't want to make assumptions; minimize yes/no questions when possible
  - We all need to make a leap of faith that there is something in the voter we like – we won't be curious about someone if we don't like them! Not going to move if we can't do this – they won't make a leap of faith if we don't do so first; it's not fair, but it's why we're here
- LISTEN – this means not always talking!
  - TAKE YOUR TIME – The voter may be nervous about saying some things to us, and this may be the first time they've talked, or even thought, about this.
  - Just because we feel awkward doesn't mean they're not thinking – wait 10 seconds!
- BIGGEST IDEA TO REMEMBER IN YOUR CONVOS: You know you're on the right track when the voter is talking about someone they love

PERSONAL STORIES VIDEOS 3-5: (3 min) Helen

- While Rodrigo/Manuela are a great way to humanize this issue, it's not enough! We need to replace their misconceptions with REAL STORIES that are personal and emotional to us too

- **VIDEO #5 - GNC Canvasser Story: Charo – 1 min**
- **VIDEO #6 - Trans Story: Justine – 1 min**
- **VIDEO #7 - Ally story: Laura – 1 min**

TELLING A GREAT STORY: (1 min) - **AJ**

- In all of these examples, the canvasser is putting out an emotion, so we are inviting the voter to emotionally engage with us and the issue, and consider what their feelings are about transgender people.
- Think about a possible story of your own you may want to share – does it have the following?
  - DETAILED – they painted a memorable picture for the voter
  - EMOTIONAL – the more emotional we can be, the more memorable our story
  - VULNERABLE - That's how we elicit stories and help a voter trust us in return!
  - Jargon – Avoid or be sure to clearly explain (ie. "Gender queer/neutral/non-confirming)

TOOLS FOR ALLIES: (1 min) -

- Allies, there are a few different ways you can connect the voter with a real story
  - Your story about a trans or GNC person you care about – Sharing about a friend or loved one who's trans can help the voter develop a different picture of what it means to be trans.
  - An experience you had when you felt judged or like people were making assumptions about you; this could be an experience based on your sexual orientation, race, class, sex, etc.
  - Rodrigo/Manuela – For some conversations, this may be the closest to reality we can get!
- Worried you don't have a story to tell? **Here is my own story you can share with voters today: AJ shares personal story (if comfortable)**

TOOLS FOR TRANS/GNC FOLKS: (2 min) -

- Be your authentic self - If you identify as non-binary, GNC or gender-queer, by all means define that for the voter.
- Don't feel like you have to have one perfect story, or that you have to share every detail
- Bring all of yourself –What are all the different pieces that make you, you? What do you love doing? Paint the picture that shows the voter that being trans is just one part of who you are!!
- Coming out can be a scary thing to do – You control who you come out to.
  - Be Brave - It's important to take the leap when talking to a conflicted voter who will hear you.
  - Have Boundaries - if you don't feel comfortable coming out or sharing part of your story, then don't!

SECTION IV: REVISIT CONCERNS (18 min + 4 video min)

ADDRESSING CONCERNS / OPPOSITION ARGUMENT: Laura (3 min)

- Raise your hand if you've heard our opposition use a message about bathrooms against our community, like the one you saw in the video we're showing voters? Can I get a collective hiss?
  - The anti–LGBT side scares voters by targeting transgender people who are just using the restroom that matches their gender identity and claim women and children will be in danger

- Early on in the conversation we show voters some news coverage of the opposition's argument. This means we may activate a transphobic reaction from voters. Why do we do this??
  - From past elections, we know three things:
    - The opposition WILL bring up bathrooms – voters will hear this argument eventually
    - Voters don't REALIZE they have this concern until the other sides raises it. If we don't bring it up, many voters will seem like supporters!
    - But if we bring the concerns and transphobia to the surface NOW, and talk about it, we can turn a SUPPORTER WHO WE WOULD LOSE into a A REAL SUPPORTER who is also LESS TRANSPHOBIC!
  - This means we will show the video to EVERY VOTER, including 10s, because we know even our supporters are susceptible to this argument from our opposition – this means some voters may MOVE BACKWARDS on the rating scale after the video – That's OK!
  - We're not addressing these concerns until LATER IN OUR CONVOS, even though it will be tempting do so earlier – try to be patient and wait!
    - Often concerns live in hypothetical stereotypes or abstract ideas. Highlighting conflict between their RLE and their concern is an access to movement.
    - It's more effective to do so once we've talked about our experiences, built rapport, and are on the same page about what transgender means

- It's during this section we'll also address any other concerns the voter mentioned up front
  - **RELIGIOUS VOTERS:** First off, DON'T make assumptions: Some religious voters are unsupportive and some are supportive

- We are not an authority on their religion**,** so DON'T get sucked into a vague or impersonal conversation about religion
- Still focus on real lived experience; it still works with religious voters, and sometimes voters use the excuse of religion to mask their true concerns

PUDDLE #2 – ROLE PLAY STEPS 2 – 4 (13 min) - Helen

- Now we're going to take turns practicing defining "transgender", telling our stories, being curious, as well as work our way through the back page through to the end rating.
- In our pods, we're going to break up into your pairs again and do this exercise for 6 minutes each:
  - Partner A: First, you will ask questions straight from the script, listen, and then dig deeper to learn more about their real lived experiences when possible– this is your chance to get used to the script and the questions we'll be asking voters!
  - Partner B: Answer questions honestly as yourself. For some steps that'll mean you'll move on quickly, (opp. argument). This is your chance to practice sharing stories and experiences.
- *Don't stop until your time is up; there is plenty to learn about someone in only 6 minutes!*

- **What about when we're talking to a voter who DOES have concerns after viewing the video? Let's see!**

SHOW VIDEO #8 – Dave & Carter (4 min) -

Talking about the Opposition's Argument [Debrief off Video] (2 min) - Helen

- Give voter a chance to PROCESS through it all right there
- Provide a REALITY CHECK – both with YOUR personal stories and use the talking points on the script! We want to find out if they work
- Keep this converastion as CLOSE TO REALITY as possible! This means talking about your/your loved ones' experiences, the voter's experiences OR Rodrigo/Manuela

SECTION V: LOGISTICS & MATERIALS (17 min)

PUDDLE #3 – MATERIALS (8 min) - _____

- We're going to take seven minutes in our pods to review the following materials:
  1. **Scripts**
  2. **Tally Sheet**
     - FULL VS. PARTIAL CONVERSATIONS: "Partial" means you got the 1st rating, but didn't/couldn't finish the conversation for whatever reason
     - Make sure you tally both kinds!
  3. **Turf Folder documents** – maps and walk lists

GOALS & HOW TO REACH THEM (3 min) - _____

Our goal today is for everyone to have at least 4 conversations during the 2 hours we're canvassing! So our group goal is to have ____ CONVOS!! Who thinks that we can accomplish that goal?

HOW TO GET 4 CONVOS –

- There are 3 primary areas in which small steps can improve your contact rate while canvassing:
  1. **Time between doors**
     - Walk briskly between doors – A LOT of voters won't be home!
     - Shake a fence for dogs, but don't see as a reason not to go to the house

- GATES AND FENCES DON'T BITE – while some gates may be locked, many aren't; lift the latch and go knock on the door!

2. **Getting people to open their doors/talking to people**
   - Knock loud enough to be heard AND ring door bell
   - Hear the TV on? They probably can't hear you! Knock loudly (and use window if louder/needed)
   - Talk to people in their cars, on the sidewalk, their front yards, sitting on their porch, etc.
   - Ask for all voters at a household!

3. **Reduce the chance of someone refusing to have the conversation**
   - First impressions count, so smile and speak clearly! Have confidence! You can do this!!
   - If "busy" pushback – DON'T "oh… ok. Sorry I bothered you."
     - TRAINER MODELS how to pushback: "I get you're busy. This will be quick and it's really important. We're curious about people's opinions."
   - TALK TO VOTERS 1-ON-1: We have to maximize our power by sending one canvasser to each door! Voters feel less comfortable when two people on their porch. You'll be moving down opposite sides of the same street, so your partner won't be too far!

4. **TIME LIMITS: LAURA**
   - When we find a conflicted, persuadable voter, our conversations are going to last 15-20 minutes!
   - We're not spending time with haters or unpersuadable people. They're a waste of our energy. Keep those convos 5-10 minutes if you can; once you realize they're unpersuadable, get out of the convo
   - We're also not spending much time with people who are already 100% supportive.
     - STILL SHOW THEM THE VIDEO, and if they're still a 10, do ask about their experience with trans folks, share your story, but then move on;
     - Circle 10 as their final/3rd rating if you're SURE they're 100% with us
     - No more than 5 -10 minutes with them!
   - IF YOU NEED TO END A CONVO: "I've got all I need! Thanks for your time. "

FINAL LOGISTICS AND TIPS (1 min) - HELEN

1. **It's a hot one!** Take care of yourself and find as much shade as possible, (when talking to voters, filling out paperwork, etc.); DRINK water
2. Exchange cell #'s with your canvass buddy now use one another for support BETWEEN convos
3. **Numbers to know:** Jessie's number is on your tally sheet – call if you have any questions!
4. Please turn in your pink sign-in slips and grab your scripts before leaving!
5. Fill out ALL your materials as you go. After you've had a conversation; find a curb and sit down
6. **Video Huddle** – IMMEDIATELY after this training those who are going to be on film will receive 5-10 more minutes of training; we're starting ASAP
7. **FINISH** your convo and leave turf at **2:30p** as we want you back by 3p

June 27th 2015 – Advanced Research Canvass Training Outline
[Total time: 55 min]; Start Time: 8:45a

- **Welcome! (1 min) _____**
  - Today is our LAST research canvass! We're in the home stretch!
  - We have to get 60 more conversations today to wrap up this phase of our research project. We want those (trans) conversations to be as high quality and effective as possible!

- **Who's here? (1 min) _____**
  - Advanced folks! Focusing on improving our own skills today – so no general training, (although we do have staff serving as coaches to help facilitate as needed)!
  - Let's be selfish and focus on ourselves!

- **Intros (3 min) _____**
  - Find someone in your pod <u>you don't know</u>, or don't know very well, and introduce yourself, share your gender pronoun, and _____
  - Trainers introduce themselves by modeling

- **What does today look like? (1 min) _____**
  - Training – until 9:45
  - Drive to turf – 10-10:30
  - IN TURF – 10:30 – 2:30 (3 ½ hours w/30 min lunch break)
  - Drive back – 2:30 – 3p
  - Debrief/eat/quality control – 3 – 4p

- **What's today about? (1 min) _____**
  - Priority #1: Improving our Personal Stories
    - 2 kinds – judgment personal stories and trans/gnc (ours or others') stories
  - Priority #2: Talking to 10s
    - We know not all 10s are truly our 100% supporters, but how can we push through with them? How do we know how truly supportive they are?

- **TALKING TO 10s** (5 min) _____
  - Who here has talked to a voter who rated themselves as a 10, but ended up not being 100% supportive? We know not all 10s are 100% supportive!
    - The rating scale is a tool for the voter to explain themselves! Let go of the rating scale meaning something more, because it's not the be-all!
  - Non-discrimination laws are a vehicle to talk about larger issues where prejudice exists – this law is not the end of opposition finding ways to get at prejudice or transphobia
    - This is why even if a voter says they support ND laws, we know that's not enough; we want to make sure to address prejudice that may exist, and this law is our way to get at the underlying prejudice that likely exists
    - Voters want to be on the right side of history, so of course they're against discrimination! But being supportive of this type of law DOES NOT mean they're supportive of LGB, and especially T people
  - We know all of the 10s we talk to are NOT 100% with us
    - We know this from our experience talking to them AND the nature of these laws
    - With many of our supporters persuasion can still/needs to happen
  - Different type of 10s: Some are like us, but many aren't
    1. **10-Advocates** – these are rare, and the only time we don't need to spend much time

2. **"Red Flag" 10s** –provide obvious (i.e. negative reaction after video), OR subtle, (i.e. word choice) red flags for us; we have a conversation like they're not a 10;
3. **Skittish Supporters** –fairly confident in their support for transgender equality, but still have underlying discomfort, (i.e. talking to others about trans folks)
4. **Ambivalent 10s** – don't say much about why they care; vague; but claim support

- What to do with the 10s who aren't advocates but also don't give us any concerns?
  - **If they are ambivalent or not supportive enough to feel comfortable voicing their opinion with others, there IS room for growth!**
  - On script option: Do you know anyone less than supportive? What do they say?
  - [OR another suggestion, not on script: How did you learn what transgender meant? What was your reaction?]

- **PRIORITY #1: OUR PERSONAL STORIES** (37 min + 3 min videos)
  - Why are they so important? (1 min) _____
    - We need voters to be more honest with us, (i.e. about their discomfort, questions, themselves); the way to do this is for us to set the tone/make that leap and be honest and vulnerable with them
    - SO much of persuasion is emotion; we need to model human emotion and not just stay on the surface, even though it may feel more comfortable
  - VIDEO Examples (of judgment): (5 min, including debrief)
    - Less good example: Ella & Artie
    - Good Example: Renzo & Lourdes
    - DEBRIEF - Get Reactions
  - How do we need to improve? (2 min)
    - We need to share STORIES; not just general, vague, experiences that aren't rooted in details, which is what we've been doing!
    - Story with start, middle and end – include details, feelings and emotions

  - PERSONAL STORY EXERCISE: (30 min + 2 min explanation + 2 min story = 34 min) _____
    - Start with judgment story (in different places on our trans/gnc & ally scripts); this could be overt or perceived judgment!
      - **3 min: Worksheet** – if you process through writing, this time is for you! If you'd prefer not to, no worries. Read questions and brainstorm on your own!
      - **Pair-up** with the partner you did your intro with – someone you do NOT know, or don't know well
        - **3 min:** Partner A will start by sharing their personal story around judgment WITHOUT being interrupted (i.e. w/questions) by Partner B
        - **3 min:** Partner B will ask questions and provide feedback! Help by sharing what (emotionally) resonated most (i.e. details you remember) OR ask questions to get details you thought were missing
    - Let's do it again! This time with our trans/gnc personal stories _____
      - BEFORE you fill out the worksheet, AJ is going to share his story – if you don't feel comfortable sharing your story, or don't have a story to share, use AJ's!

- **Final reminders/tips** (2 min) _____
  1. Our goal today is 5 convos apiece!
  2. Take care of yourselves! Take water, and breaks as needed
     i. If you AND your partner can drive, each drive to turf and drive between houses as much as you can to stay out of the heat and be productive
  3. When on turf…

    i. DO NOT do recycling conversations in Spanish if you are NOT able to do trans conversations in Spanish
    ii. Parking – let's try not to park in front of people's houses; go to the end of the block!
    iii. Gates don't bite! But dogs can…so shake a fence, listen, and lift a latch, if all is well
        1. If a dog comes up to you, feel free to use your clipboard for protection!
    iv. Stay-back & Roamer – Number on tally sheet is for _____
4. Before you head out…
    i. Your pod leaders will pair you up with your canvass buddy, and then you'll get your sack lunch, turf and extra scripts with your partner as you head out
5. Leave turf at 2:30p
6. If you have any questions or challenges you feel didn't get addressed, please come up to us (trainers) or your coach after this training is done
7. Let's go!

TRANS-INCLUSIVE NON-DISCRIMINATION CANVASS –TRANS/GNC PERSONAL STORY WORKSHEET

Story Number 1 from the Script** ***Share a story of how you 'came out' to yourself as transgender/GNC*** **

I'm out here today because I'm transgender/ gender non-conforming which means…
and it's important to me that these non-discrimination laws protect me because…

Who supported you when you first came out? Who supports you now? What is it like for you to feel supported? Why is being supported important to you? **What does my story make you think about?**

Workshop: What do you want to share about your gender-identity? How do you describe your identity and what it means to you?

Story number 2 from the script: **SHARE YOUR JUDGMENT STORY **

I have felt judged by the way that people perceived me…

This one time… (come out, be vulnerable: tell story re: race, economic status, gender)

Work shop: Think of a time when you felt judged or someone made an assumption about you just because of who you are. Describe a time when your gender-identity impacted the way were treated.

- Where were you? Who was involved? What time of day? What happened? How did that impact you?
- Consider different parts of your identity that matter to you—race, social norms, gender roles religion, language, culture, gender, sexual orientation, family history, age, ability, class etc

TRANS-INCLUSIVE NON-DISCRIMINATION CANVASS – ALLY PERSONAL STORY WORKSHEET

Story number 1 from the script: **SHARE YOUR JUDGMENT STORY **

I don't identify as transgender but I have felt judged by the way that people perceived me…
This one time… (come out, be vulnerable: tell story re: race, economic status, gender)

Work shop: Think of a time when you felt judged or someone made an assumption about you just because of who you are.

- Where were you? Who was involved? What time of day? What happened? How did that impact you?
- Consider different parts of your identity that matter to you—race, social norms, gender roles religion, language, culture, gender, sexual orientation, family history, age, ability, class etc

Story number 2 from the script: **SHARE *YOUR* STORY to Help the Voter Identify with Trans People**

My friend____ is transgender/GNC, which means… and this one time…

Know someone: Who do you know (pretty well) who is transgender or gender non-conforming?

- How do you know that person? What do you know about them? Do you know a specific story that would paint a picture of how their gender identity impacts them? What impacts you emotionally about their story?

Do not know someone Trans and GNC:

- Recount the details of AJ's story. What was emotionally impactful? What details help paint the picture? What was the impact of the story on AJ?
- How did you feel hearing AJ's story?

My friend____ is transgender/Gender Nonconforming, which means…

and this one time…

6/6/15 RESEARCH EARLY BIRD TRAINING

Total Time of Training: 45m

I. CONTEXT & CONVO OVERVIEW (9 MIN)

1) **Welcome and Trainer Intros** (1 min) **Justin**
   - Good Morning Everyone! Welcome and thank you for being here today for SAVE's canvass against transphobia!!
   - Trainer intros w/Pronouns- Credential yourself and why we say our PGP's
2) **Participant Intros (7 min) Lisa**
   - To start us off lets go around the room and check-in. Say your name, PGP and ONE word re: how you are feeling about being an early bird canvasser?
3) **Content/Urgency** (1 min) **Justin**
   - So we are out here as a team today to dismantle transphobia with face to face conversations. This research is going to help us know if our conversations are having a lasting impact
   - We have had_____conversations and need to have 400 by the end of June
   - Earlybirders matter!! With 3 ½ hours in the field we can have twice as many conversations with our best canvassers.
   - Who is ready to kick ass today!

II. SKILLS: HOW DO WE MAKE A MEASURABLE IMPACT WITH VOTERS? (22 MIN)

1) **Define Trans; build familiarity and Vulnerability; Your and the Voters' Experiences! (1 min) Lisa**
   - VULNERABILITY: We know our best shot moving voters is sharing emotionally resonant stories and eliciting emotionally resonant stories
     - Trainer Share a story, how has this helped you in the past?

2) **Voter's Real Experience Listening and Curiosity: (4 min) Justin**
   - Our goal is to get to an experience with emotional weight, in which the voter is being vulnerable with us - How do we do that? How do you get a voter to talk about their feelings?
     - 3-5 open ended questions
     - Pause - Silence is a great tool
     - Dig into the story that has emotional weight? How do we know this?
     - Biggest Idea to Remember in Your Convos: You know you're on the right track when the voter is talking about someone they love

3) **Your Real Experience: Sharing Vulnerable Stories (6 min) Lisa**
   - What are we sharing? Real stories about Judgment, Our own experience with gender and the trans/GNC people in our lives
   - How?
     - Detailed, share what emotion you felt in that moment

- 4 steps to share a story if you're an ally – provide example
    1. Birth: When [PPP name of transgender person] was born, their parents thought they had a [son/daughter].
    2. Awareness of true gender: But by the time PPP was ____ years old, they realized: I am really a [boy/girl].useful specifics: how did they feel with this realization? did they tell anyone? why or why not tell others?
    3. The beginning of transition: For [this specific period of time], PPP tried to fit in. But by the time they were _____ years old, they began their transition so they could live as the [boy/girl] that they knew they were. useful specifics: what was their first transition step? how did they feel taking that step? what was their 2nd step? we are really painting the picture of PPP coming out of the closet
    4. Now: PPP is living fully as a [man/woman] and are grateful they can be who they really are. useful specifics: show a picture of them right now! or describe how they look in great detail, height, weight, what kind of clothes they wear, their haircut;and also: what your friendship with them is like, why you love them

4) Practice **Puddle #1 – Roleplay Steps 2-4 (13 min)** Justin
   - We're going to break up into pairs and do this exercise for 6 minutes each:
     - Partner A: First, you will ask questions straight from the script, listen, and then dig deeper to learn more about their real lived experiences when possible– this is your chance to get used to the script and the questions we'll be asking voters!
     - Partner B: Answer questions honestly as yourself. For some steps that'll mean you'll move on quickly, (opp. argument). This is your chance to practice sharing stories and experiences.

III. LOGISTICS AND TIPS 7 MIN

1) **Schedule (1 min)** Lisa
   - 8:30-9:45 Training
   - 10-12pm Shift 1
   - 12-12:45 Lunch/Break
   - 12:45-2:15 Shift 2
   - 3:15-4pm Big Canvass Debrief and Lunch 2

2) **Pair ups (2 min)** Justin

3) **Goals (3 min) Justin**
   - Our goal today is for everyone to have at least 8 conversations, which includes placebo AND transgender-equality conversations.

- 10's are often not 10's! 95% of our voters do not feel comfortable with trans/gnc people and therefore are in need of a conversation (unless they're recycling)
- Schedule "Callbacks" – When there is a real reason voter can't talk right now, let's do our best to still find a time to talk with them
    - Make a plan with the voter: I.e. "You're headed out the door? You're on the phone? Not a problem. When will you be back and able to talk?"
    - Talk to a someone in the household? Ask when the person will be home. You will have a much better idea of which doors you should knock on again.
    - Be specific – "The person on my list isn't home? Do you know the specific time they're planning on getting home?"
    - If there's time at the end of the shift, come back to the doors where the voter wasn't home
- Every Door Counts! Reduce the chance of someone refusing to have the conversation; we don't have the luxury of having lots of doors and voters to choose from
    - First impressions count, so smile and speak clearly! Have confidence! You can do this!!
    - If "busy" pushback – DON'T "oh… ok. Sorry I bothered you."
        - Trainer Models how to pushback: "I get you're busy. This will be quick and it's really important. We're curious about people's opinions."

4) **Turf Navigation** JUSTIN (1 min)
    - Only have conversations with the voter on the list and the specific convo designated
    - Drive between doors if you can, use google maps to see how far of a walk it is between doors.

5) **Final Logistics and Tips** LISA (1 min)
    - What if a voter mentions the survey or frequency of transgender coming up?
        - "We've heard some people are doing research in this area. I don't know much about it." OR "Yeah, there are always pollsters calling on the phone" OR Caitlyn Jenner comment
    - 10's are not 10's- we know almost ALL of the voters we're talking to today – 95% are NOT 100% supportive of transgender people, even if they rate themselves as a 10 in our conversations; this means almost every single voter has room to grow!
    - It's a hot one! Walk WITH water; don't leave it in car. Make a plan to meet up with your partner for lunch and take a break. Get in the car and run AC if you can.
    - Numbers to know**:** Belky's number is on your tally sheet – call with questions!
    - Please turn in your pink sign-in slips before leaving!

- Fill out ALL your materials as you go. After you've had a conversation; find a curb and sit down
- Finish your convo and leave turf at 2:30p as we want you back by 3p

The HEADS IN THE GAME Training

Take 15 mins to prep with your canvass buddy before you head out / start knocking today.

I. Q&A – 5 min – (Goal: Identify the #1 biggest thing for your canvass buddy to focus on improving or pushing themselves on in their convos tonight)
   a. What've you been the most proud of at your last few canvasses? Any big breakthroughs?
   b. What has been your biggest challenge?
   c. What questions are on your mind? Anything you've been stumped on or wondering about, but have had the chance to talk about?

II. Role Play! – 10 min
   a. Role play a whole conversation! Focus on being the voter your partner needs to talk to in order to practice the skill you came to above.
      i. If ten minutes isn't enough, continue in car.
      ii. If you're in turf already, try to stick to ten minutes and skip over the parts of the convo that are lower priority (do a partial role play)

Canvass debrief, 40 minutes Part 1: hearing and affirming experiences

1. Opening – 3 min.

Welcome back! I can tell we all worked hard today.
How many of you talked with a voter today? Great.
2 voters? 3? 4? 5? [keep going!] Nice!

2. Stories — 10 min.

We want to hear about the different kind of experiences people had today—especially if you had a conversation today where you made a strong connection with a voter. We want to hear about that specific conversation, and that feeling of connection, and what you did that helped you connect.

a. We know that it takes an extra level of vulnerability and bravery to share your own story as transgender/gender non conforming person. We want to take the time to lift up the experiences of our trans family. Did any of you make a great emotional connection with one of your voters today? – 5 min. – 5 min.

b. What about those of you who moved a voter, they changed where they stand, or you can tell you planted the seed that will help them become less prejudiced against transgender people? Who moved a voter [show of hands]? Who wants to share a story about a specific voter you talked with today who moved, and what you did that helped them move? – 5 min.

3. Improvement— 5 min.

How are you improving? Where are you still getting stuck?

4. Results – 5 min.

Would you like to know how we did today as a team? Drumroll please!

[go through all the numbers]

Together as a team we talked with _____ voters, that's great, that's exactly what we needed to do to make sure we're learning how to do this better.

5. Recommit for July 25! — 5 min.
- Obviously, this Saturday's Canvass from 8:45am-4:00pm

- On Friday, July 10th, SAVE is co-sponsoring the Gay Men's Chorus Performance at Trinity Episcopal Cathedral, which is the kick off for their upcoming tour of Cuba (BIG

deal). Justin and Charo need help staffing the event, which would mean helping out with set-up and clean up and getting to watch the performance!

- SAVE's next Trans Equality Persuasion Canvass will be happening on Saturday, July 25th! Who's in?

INTRO

Rapper 1: Hello everyone! My name is _____.

Rapper 2: And I'm _____. We're with SAVE. We to fight prejudice against gay and transgender people.

PROBLEM: DELIVER URGENCY!

Rapper 1: How many of you know someone who is Lesbian, Gay, Bisexual or Transgender? Or you are LGBT? [react, e.g. wow, that's all of you! Or wow, that's very few of you!]

Come Out! *Ex: I'm lesbian/gay/queer/bisexual/transgender. / My uncle Joe in Arizona is gay. / My friend Jay is transgender.*

Across the country, people like me/my friend and the people you know are facing a huge problem.

- In **29 states** that is still completely legal to be denied jobs, housing, and access to hotels and restaurants just for being gay or transgender.
    - *Optional: For example, we worked with a transgender woman in Michigan, Allison, who was denied housing 28 times in two weeks just because she's transgender.*
- Unfortunately, when our community comes together to pass non-discrimination laws, anti-LGBT opponents try to repeal those laws – and they succeed 50% of the time.

Rapper 2:

We actually just had a victory in Miami-Dade to include protections for transgender people. **But the truth is the anti-gay opposition is stronger than we have ever seen it and voters in Miami-dade will soon decide whether or not it's ok to discriminate against transgender people.**

SOLUTION

Rapper 2: Our side can win, but only if we help. Our team in Miami is going to be conducting a research experiment to discover how to reduce transphobia through face-to-face conversations. For many voters, our conversation will be the first time they've talked with a gay person – or with a straight person who cares about LGBT people. By having these honest conversations with voters before they vote, we could make the difference between winning and losing.

ASK

Rapper 1:

Our team at SAVE team is growing and we need your support. The first step is taking out that white sheet we passed out and filling out your name and phone number legibly. Your phone number is essential so we can text and reach you.

- The highest priority is coming to our Kick off canvass this Saturday next phone bank is on Saturday, October 5th from 9:30 to 3pm right by campus.
- We will carpool that morning from UCLA; we'll train you; feed you; and you will be back on campus at 2.
- We have 30 people already signed up but we need 10 more. We are looking for canvassers to have face-to-face conversations but we are also looking for videographers to video tape other people having conversations. No experience necessary.

Rapper 2: If you want to learn more about our work, please come to one of our info session tomorrow here on campus Wednesday 1/21 at 3:30pm.

If you are the kind of person who wants to make a difference and stand up for equal rights, this is a chance to work together with a team of people who care. Thanks for signing up and getting involved!

01/20/15 FIU Class Rap Schedule					
Time	**Status**	**Class Information**	**Rappers/ Passers**	**Results**	**Notes**
Leave SAVE Office @ 7:45am					
8:30am-9:00am	**Rehearsal!**	8am-8:10am- Intros (get coffee before 8am) 8:30am-8:35am- Structure of Pitch 8:35am-9:00am- Practice Pitch/Sch. of Day 9:15am-9:30- Walk to Pitch	Justin, Ella, Steve and Charo	-Go over basic Structure of Pitch -Practice w/Partner	
9:30am	**Not Confirmed**	Feminist Theory Labor Center 110 35 Students Ferial Boutaghou	Ella	Rapped Yes or no Total Slips ____ Canv____ Info Sesh_____ Leader_____	
9:30 am	**Confirmed**	Women and Men in International Relations Graham Center 277 45 Students Susanne Zwingel	Justin	Rapped Yes or no Total Slips ____ Canv____ Info Sesh_____ Leader_____	
9:30 am	**Not Confirmed**	Psychology of Women Chem & Physics 197 103 Students Shannon Quintana	Charo	Rapped Yes or no Total Slips ____ Canv____ Info Sesh_____ Leader_____	
9:30 am	**Not Confirmed**	Queer Studies: Literature, Culture and Theory College of Business Complex 254 16 Students Steven Ryan Blevins	Steve	Rapped Yes or no Total Slips ____ Canv____ Info Sesh_____ Leader_____	
After pitch Meet up and find Aida					
11:00am	**Confirmed**	Class Trad Soc Theory Charles E. Perry (PC) 213 51 Students Tardanico	Justin	Rapped Yes or no Total Slips ____ Canv____ Info Sesh_____ Leader_____	

11:00am	**Confirmed**	Intro to Global Gender and Women's Studies –- PG5 MARKET STATION 134 95 Students Moura	Charo and Aida	Rapped Yes or no Total Slips ____ Canv____ Info Sesh_____ Leader_____	
11am	**Not Confirmed**	Communication Theory Academic Health Center 3 - 215 60 Students Travis Lakin	Ella	Rapped Yes or no Total Slips ____ Canv____ Info Sesh_____ Leader_____	
11am	**Not Confirmed**	Global Psychology: Cross Cultural Perspectives on Psychological Research and Theories SCH. INTER.&PUBLIC AFFAIRS 103Number of students Unknown Shannon Quintana	Steve	Rapped Yes or no Total Slips ____ Canv____ Info Sesh_____ Leader_____	
12:30pm	**Confirmed**	Intro Sociology Green Library 100 221 Students Oueslati-Porter	Ella and Steve	Rapped Yes or no Total Slips ____ Canv____ Info Sesh_____ Leader_____	
12:30pm	**Confirmed**	Ant Race/Ethnicity Ziff Education Bldg 150 68 Students Queeley	Aida and Justin	Rapped Yes or no Total Slips ____ Canv____ Info Sesh_____ Leader_____	
12:30pm	**Not Confirmed**	Latin American Civilization Graham Center 287A 45 Students Maria Zumaglini	Charo	Rapped Yes or no Total Slips ____ Canv____ Info Sesh_____ Leader_____	
Meet up to Eat Lunch					
2:00pm	**Not Confirmed**	Topics in Women's Lit: Home and Domesticity SCH. INTER.&PUBLIC AFFAIRS 100 50 Students Nandini Dhar	Charo	Rapped Yes or no Total Slips ____ Canv____ Info Sesh_____ Leader_____	

2:00pm	**Confirmed**	Indiv in Society Green Library 100 197 Students Grenier	Steve and Ella	Rapped Yes or no Total Slips ____ Canv____ Info Sesh_____ Leader_____	
2:00pm	**Not Confirmed**	Anthro Theory Paul Cejas Architecture 150 40 Students Ritchie	Justin	Rapped Yes or no Total Slips ____ Canv____ Info Sesh_____ Leader_____	
Meet up and head back to the office					

Totals!

Classes Rapped: _____ Total # of specific sign-ups: _____

Classes Declined: _____ Canvass Sign-ups: _____

Students who heard announcement:_____ Orientation sign-ups: _____

General Interest Sign-ups (did not check any box): _____ Leader sign-ups: _____

Slips with no phone number:_____

Trans*/GNC Initial Conversation Script- Goal: Build Rapport and Get a Sense of Interest in this kind of work

BUILD RAPPORT

Hi, is this _____? Hi, I'm _____ from SAVE. *How are you?*

I'm calling to update you on how we're fighting for transgender equality. Have you about what we're doing this year?

[If yes] Great! What have you heard? How did you hear about SAVE? **[Afterwards go to 'What We Found']**

[If no] Since January, we're working to dismantle transphobia by having 1-on-1 conversations with voters. We're educating them about the importance of transgender-inclusive non-discrimination laws.

What We Found:

We've found that there is a group of voters who will vote in favor of this law, but the minute they see transphobic propaganda from the anti-LGBT side, we lose their vote. **These voters make the difference between winning and losing this law.** Majority of these voters don't know someone who is transgender and/or they don't know what discrimination towards transgender people looks like, so when they see this propaganda, they get scared and without intending to *or wanting to*, these voters vote against equal rights. **Does that make sense? What do you think about all of this? (Share what you think about all of this)**

Follow-Up Questions (Dig Deep):

- We're calling people who said they were interested in our work. What motivated you to sign-up?
- Have you volunteered with SAVE before? What did you do? What was your favorite part? What was most challenging, if there was something?
- Have you ever done this kind of political work before? If so, what?
- Have you ever done activist work before? What was your favorite part? How did you get started? (CONTEXT: A lot of people care about LGBT rights and equality, but don't go out and actively do something)
- Aside from transgender equality, are there any other issues that you care deeply about?

(Share why this work is important to you, how/why you got started and how/why you keep staying involve)

URGENCY AND ASKS

Last December, in Miami-Dade county, transgender people were added to the list of people you can't discriminate against. Now you can't fire someone, deny them housing or kick them out of restaurant because of their gender identity and/or expression. **Did you hear about this? What do you think? Why is this law important to you? What does having these protections mean for/to you? (Share your thoughts)**

SAVE was at the forefront of passing this law, canvassing and phone banking to make sure our elected officials heard from the community and that the right people were in office.

And we can't stop now. This law is at risk. The anti-LGBT side has publically declared that they do not want this law in place, so they're going to scare voters into voting against equal rights. We refuse to sit back and let this transphobia just happen, so we're going out there talking to voters 1-on-1 to find out what their concerns are and correct them. This means that we get real and vulnerable with the voter, coming out and sharing our experiences while being compassionate and curious about where the voter is at, even if the voter's concerns can be tough to hear.

Does this sound like something you would be interested in doing?

[If no] Great. Thank you for being honest. We completely understand. Instead of having conversations, do you want to be involved in other ways? If so how? **[if no, ask if they would like to be taken off the list]**

[If yes] Great. We want to make sure you feel as prepared as possible. Are you nervous about anything? Is there any way we can best support you? **[Possible suggestions to do during 1-on-1: video viewing, seeing scripts; end convo with Ask for Canvass, Power Summit, and concrete next steps]**

INTRODUCE YOURSELF & BUILD RAPPORT / RECONNECT

Hi. Is this ____? This is ____ with SAVE. **How are you doing today?**

I'm calling you tonight because despite our recent wins, the fight for LGBT equality is far from over in Florida. Our opposition is working relentlessly to weaken protections for people who are transgender. **And we need YOUR help!**

Did you know that there is currently a bill in the Florida House of Representatives called HB 583 that would criminalize transgender people for using the bathroom? *[Listen. If disrespectful or unreceptive, politely end call]*
Yeah, it's sad but true. We really need your help to make sure the entire LGBT community is protected.

Before we get into your involvement, I'd love to hear about **why protecting the rights of people that are LGBT important to you [OR] what motivated you to get involved with SAVE?**

I agree. I volunteer because… *[In a sentence or two, share your story/motivation.]*

URGENCY

In December SAVE and volunteers like yourself worked very hard to pass a law to protect people who are transgender from discrimination. Before then, it was 100% legal to fire, evict or refuse service to people just for being transgender. **Did you know this?**

- Were you one of the folks that helped get the law passed? **[If Yes]** Thank you for your amazing work!

Our opposition is working to overturn this law, pledging to make discrimination against people who are transgender legal again. And they're relying on being able to scare voters into voting against equality by appealing to people's misconceptions and fears about who transgender people are. **What do you think about that?**

- HB583 is one way the opposition is working to weaken these protections. HB583 would criminalize access to public facilities for transgender Floridians. It would allow discrimination against not only people who are transgender, but also those who refuse to discriminate against them.
- We also expect the opposition to try to repeal this local law as soon as next November. Across the country, the opposition successfully repeals these laws 50% of the time.

So it's up to us to go out into our community and have conversations that help people understand who transgender people are and why these protections are important. If we can reduce the amount of transphobia in our neighborhoods NOW, we can stop the opposition and also make life better for LGBT people in Miami in the long run.

And to do this we need a big team. **Can we count on you to join our team of volunteers?**

- Once the opposition gets going they are going to be very organized, and we need to be prepared. Right now our team just isn't big enough to have enough conversations to win.
- This is the most strategic work we could be doing to reduce prejudice against people who are LGBT in Miami Dade.

ASK 1 On Saturday, April 11th from 9:15am to 4pm SAVE will be going door-to-door talking with voters near the FIU south campus area. Canvassing is the most effective way we can help people become more supportive of transgender people. **Can you join us Saturday, April 11th at 9:15am for our prejudice reduction canvass?**

YES Have you ever canvassed before?

YES/NO [Great, then you know / No worries,] there's a whole team of us, we start with a training and provide a script. How does that sound?
We'll be meeting at FIU south campus. More details will be sent out shortly via email.
We will start with a light breakfast and registration at 9:15am so please be there on time.
[If still nervous go to Addressing Concerns section.]

ASK 2 We also educate voters EVERY Wednesday over the phone. **Can we count on you to join us for our voter education phonebank this/next Wednesday at 5:45pm?**

YES Great! We will be meeting at our office on 4500 Biscayne Blvd. We will start at 5:45pm so please be here on time. Have you ever phonebanked before?

YES/NO [Great, then you know / No worries,] there's a whole team of us, we start with a training and provide a script. We will also have pizza before the training.
We will be sending an email reminder a few days before. Do you have any questions?
[If still nervous go to Addressing Concerns section.]

NO **What's keeping you from joining us?** ***PROBLEM SOLVE AND PUSHBACK! (FAB model)***

STILL NO **Would you like us to still keep you on our volunteer list?** *[End conversation.]*

BRING A FRIEND ASK

A great way to double our impact and grow our team of volunteers is by bringing a friend. **Do you have any friends you could bring with you?**

YES Great. Who are you going to ask? Can you ask them as soon as we hang up? Fantastic!
NO *[Move on to Closing.]*

CLOSING

Do you have any questions? If you think of any, contact Charo at 786-442-8199.
Thank you so much for your commitment to equality! We look forward to seeing you (and ___) on (day and date). All of us working TOGETHER is how we reduce prejudice and make Miami Dade County safer for people who are LGBT.

ADDRESSING CONCERNS

- TRAINING: We start out with a full training and you get a chance to see what a conversation looks like and practice before you talk to a voter.
- SCRIPT: There's a script to guide you in your conversations and give you questions to ask and pointers to address concerns at the door.
- COACHES: Our goal is to make sure you have a good experience and that you feel motivated and supported. There will be coaches and experienced volunteers around to answer any questions you have.
- SUCCESS: You don't need to be an expert to have successful conversations; you just need a little training, determination and yourself! Even brand new volunteers have been able to move people to be more supportive. You can do it too! [*Share personal success story*]
- Videographer Ask: [ONLY if you go through all of the above and they're still too concerned, for CANVASS ONLY]: I totally understand your concern, it's a hard thing to envision ourselves doing when we're not used to it. But we also have a huge need on Saturday's canvass for videographers –volunteers who will go out with canvassers and film their conversations with a simple camera that we will provide. This is what really allows us to get better at these conversations, so it's really important, but it would also let you get a sense of what this is like without actually having to talk to any voters yourself. **Could you help us as a videographer?**

FAB MODEL

FRIEND *[Clarify their concerns – ask questions]*

- **What's keeping you from joining us?**
- Have you ever done anything like this before? *[If No, we will start with a training, and give you a script so you will be well prepared to talk to voters]*
- How do you feel about talking to voters/volunteers? / What are you nervous about?
- It's ok if you're nervous, etc…We'll train you, go through a role play, there's a team of coaches and trainers..
- *[Empathize]* I hear you… I'm busy too, but I make this a priority because…

ACTIVIST *[Motivate and Reinforce Urgency]*

- All of us working TOGETHER is what it will take to make sure everyone, including people that are transgender, have the same basic rights to provide for our families in Miami-Dade.
- I know this is an important issue for you, because early you said…
- There's still a lot of homophobia and transphobia in our communities and the best way to combat prejudice is to have those intentional one-on-one conversations.
- Our opposition is relentless and very organized and they have publically pledged to repeal these protections.
- We have a chance to do something that is going to impact LGBT people in Miami Dade.
- This is really basic, necessary stuff—being able to get a job and not be denied housing or service.
- We can do it, but only if we have a big enough team starting NOW to reach enough voters to make a real impact

BANKER

Can we count on you to join us?

Trans* Justice Power Summit Volunteer Recruitment Phone Bank Training Outline

I. Introduction (15 minutes)- _____

a. Name, PGP, and How did you know that fighting for transgender equality was something important to you?

II. Goal (1 Minute)- _____

a. Recruit people in Miami to attend the Trans* Justice Power Summit
b. We want **60 people** from Miami to be there. We are close to hitting out goal, but we need to reach more people.
c. <u>We have 7 days left until the Power Summit</u>

III. Agenda (1 minute)- _____

a. 2-2:45 training
b. 2:45-3:45 Call time!
c. 3:45-4pm Mini group Check-in
d. 4-5:30pm Keep Calling!
e. 5:30-6pm Debrief

IV. Our Partners (3 minutes)-_____

a. ***Who are our partners:*** The Leadership LAB is teamed with 2 organizations to put together this Power Summit: The National LGBTQ Task Force and SAVE. The Task Force has been organizing power summits for over 15 years. We are working with about 10 amazing people from the task who specialize in volunteer recruitment, canvassing and phone banking, and faith-based organizing. SAVE is the only political organizing LGBT organization in Miami-Dade county in Florida. They have a staff of 2 people. (so volunteers are super important!).
b. ***Why are we partnered with them:*** The task Force and the LAB are paired with SAVE to help SAVE launch a major transgender prejudice reduction campaign. In Miami, FL they are going to measure if one conversation with a voter actually makes an impact (just like we did with marriage and abortion access). They are starting this research in June. This power summit is going to help SAVE launch this research project to see if the canvass conversations are actually effective. In other words, the power summit is going to be the LAST chance for Miami to learn if the canvass script and training are effective before we test it.
c. ***What makes these partners great:*** SAVE and the Task Force are the absolute best coalition partners we could ever ask for. They are willing to receive our help and learn with us. They are beyond excited and grateful for us making these calls today. Remember, they only have 2 staff members
d. ***There is an AFE Miami crew (They don't call themselves that, but that's how Virginia thinks of them)!*** There is a group of 10 Miami volunteers who have been calling and recruiting people in Miami. Today we are helping them and being apart of a NATIONAL RECRUITMENT TEAM!!!

V. How can we help? Call past SAVE volunteers! (1 minutes)- _____

a. Today we are calling past SAVE volunteers who have either canvassed, phone banked, data entry or material prep before.

Trans* Justice Power Summit Volunteer Recruitment Phone Bank Training Outline

b. We have about 100 dials to get through, so this means that we might have call through this list twice or three times today. All of that is okay because WE ONLY HAVE 7 DAYS LEFT TO TURN OUT 60 PEOPLE.
c. Some of these folks may have heard about the Power Summit and some may have never heard of the Power Summit before.

VI. What is the power summit? (15 minutes) -_____

a. Now that we know who we're calling, let's switch gears and talk about what we're calling folks about: THE POWER SUMMIT
b. Without looking at your script, let's go around and describe what the Power Summit is in our own words. There are no worng answers. The reason why we are doing this is because we need to practice describing the Power Summit in these calls.
i. After everyone has gone, trainers: answer people's question that they may have about the Power Summit.
c. Now that we have an understanding of the Power Summit, go ahead and read your script. There is a page for additional information about the Power Summit, read that too (2 minutes).
i. Hold all questions regarding the script until the end.

VII. What are you most excited about? (10 Minutes)- _____

a. Now that we've read the script and have a better understanding of what the Power Summit is, let's go around and say what we're most excited about regarding the Power Summit!

VIII. How to make these calls: (Only go over FAB, role play and practice script if you feel this is necessary for your group) This section will add another 15 minutes to the training, fyi

a. FAB + Pushback
b. Role Play + Practice
c.

IX. Materials (1 minute)-_____

a. Explain how to mark on the call list

X. Reminders (1 minute)- _____

a. Please double check e-mail addresses
b. Make sure everyone has the registration link
c. Make sure everyone knows about the registration fee

INTRO: Have you canvassed before?

Hi, is this _____? Hi, I'm _____ from SAVE. *How are you?*

I'm calling because you signed up for our canvass this Saturday June 20 from 8:45 am to 4pm. Are you all set to be there? **[If No, pushback]**

This is going to be the first time we are going to measure if we are actually making an impact with voters, so we want to make sure you feel great canvassing and talking face-to-face with voters.

Have you ever done this prejudice-reduction canvassing with us before?

Yes	**No**
• What was it like? What happened? • How did you feel before/after canvassing? Was it what you expected? • Have you ever done something like it before? [If yes] how was canvassing similar/different? What motivated you to canvass?	• How are you feeling about Saturday? • How did you hear about the canvass? • What motivated you to sign up?
Share your experience	*Share your experience*

Urgency: What makes this canvass different?

June 20th is going to be our ***biggest*** canvass this month because this Saturday is going to determine whether or not we are on track to completing this research.

We need 400 conversations in order to be measured and we've already had 148 conversations, which is great! ***(pause, breathe, and celebrate!) Share how this makes you feel and why you feel that way.***

We only need about 250 more conversations with voters to complete this research measurement. *How are you feeling about going into research mode? Why is completing this research important to you? What's the most exciting part for you? Share your thoughts.*

On Saturday, we're only talking to voters that the Stanford researchers know we can follow up with. This means that we can only talk to voters on our list and the voters are more spread apart than previous canvasses.

Our goal is to get 160 conversations this Saturday. In order for us to reach our goal, we to knock on at least 30 doors each and have 4 conversations each, some people are going to be sent out to turf where their canvassing buddy is more than 2 blocks away from them and some will be closer to their canvassing buddy. We want canvassers to choose whichever way they feel most comfortable. Are you more comfortable:

1. Go door-to-door by yourself with your canvassing buddy more than 2 blocks away from you
2. Go door-to-door by yourself with your canvassing buddy about a block away
3. *Go door-to-door with your canvassing buddy at the door with you*

One of the ways we want to increase conversation rate is to drive between doors. Are you driving to the canvass?

(If too nervous to canvass/doesn't feel like canvassing is the right role, go to OTHER ASKS)

Other Logistics

E-mail: Did you receive the e-mail? [If not, write down e-mail address]
Time: 8:45am – 4 pm
Leader show-up times:

- 7:30am: Site Coordinators, Coaches Lead, Trainers, Photographer and set-up team
- 8:00: Sign-in Crew, Greeters
- 8:30: Early birds, coaches and pod leaders

Early Bird: I have here that you're signed up to be one of our early bird canvassers. *Does that sound about right?* Great! An early bird canvasser is a person who has been doing this research canvassing already and is one of our most advance canvassers who doesn't need an hour and half long training. So, we'll need you to arrive by 8:30 am, so we can do a quick training that's focused on role-playing and then be canvassing by 10 am. We'll canvass until 12 and then take a break for lunch and then canvass for the last hour and a half. We're hoping that each early bird canvasser will have 6-10 conversations. We'll provide a lunch for you as well as a ton fo water and sunscreen, but please remember to wear comfortable clothes and shoes. Do you have any questions about being an early bird? How are you feeling about being an early bird?

Address: LaVoie Hall, Room #113- Barry University, 11300 Northeast 2nd Avenue, Miami, FL 33161
Driving: Are you driving there? Can you pick people up? From where? How many people can fit in your car?//Do you need a ride? From where?
Parking: TBA
Video: In the e-mail we sent, there is a video link. We show this video to voters to see if this media clip impacts how they feel. Please download it onto your smart phone, iPad, tablet, etc. before Saturday. We have limited amount of ad players, so we want to save the ad players for folks who truly need them. In the e-mail with the link, we will also send instructions on how to download the video.

Other than that, we'll see you Saturday. Do you have any questions? If you have anymore, please give Nat a call at 305-308-5110.

[If No or Maybe]: Problem solve and Push back with compassion

[Clarify their concerns] I know you care about this because you said….

- **What's keeping you from joining us?**
- Are you nervous? (You can ask questions, don't have to have any prior knowledge/experience, can be part of a great community…)

[Empathize] I hear you… I'm busy too, but I make this a priority because fighting transphobia is important to me …

[Motivate & Reinforce Urgency]

- **This canvass is going to be ground-breaking. In order for us to achieve the 400 conversations with voters we need, we need to have 33 canvassers at this canvass.**

[Ask again]

Can you make it a priority to fight transphobia and join us for our canvass?

Other asks if volunteer is too nervous to canvass/doesn't feel like canvassing is a right fit for them:

1. **Driver: drive people between doors to cut down on walking time and help us reach our goal of 30 doors and 4 conversations per volunteer (show up at 9 am)**
2. **Roamer: Drive from turf to turf to give canvassers water and be there for them if they need a break (ie: be someone they can talk to about their conversations) and help energize them to keep going!**

RESCHEDULE ASKS

For the month of June, we are going to have canvassing on our minds day and night, can't stop/won't stop mentality because we know that this project is going to change history. Imagine actually knowing how far 1 conversation will go! We want to develop a team of 20 to 30 volunteers who are down to figure out how to dismantle transphobia in a long-lasting way.

1. **Saturday 6/27/15, research canvass, 9am-4pm**

Hello Amazing Volunteers!

Thank you for signing up for the canvass this Saturday June 27! In Miami and across the country, anti-transgender legislation is a looming threat. To figure out how can we protect transgender equality, especially in the face of a ballot measure, we've been doing something completely unique. Since January, we've been going door-to-door having open, deep face-to-face conversations with voters about their transphobia.

Now that we've got the hang of these conversations, it's time to put our conversations to the test:**Are we actually making an impact? If yes, then how far does that impact go?**

We only have this last canvass to complete this research. We've paired up with Professor David Broockman from Stanford University and PhD Political Science candidate Josh Kalla from University of California, Berkeley, and they will be measuring our conversations. In order to have enough data to assess our impact, we need to get 400 conversations with voters during the month of June.

We NEED 92 more conversations to hit our goal and we only have this week to get those 92!!! Since y'all have experience with the research-style canvassing, we're going to have an advanced training on Saturday and then send you out early to get as many conversations as possible. We'll also have delicious coffee and breakfast in the morning to get you energized and ready to have deep, impactful conversations!!

If you have any questions, please call Nat Perez Del Rio at (305) 308-5110 or e-mail them at natalie.perezdelrio@gmail.com. Nat is our confirm call manager, so please call them any time. Nat and their confirm call team will be giving you a call later on this week to make sure you're good to go for the canvass!

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Date: Saturday June 27th
Time: 8:15am-4pm
7:30am for Action Lead, Site Coordinators, Trainers, Coaches, Set-up Team, Sign-in Crew, Greeters, Video Check-out Team

Location: See attached campus map
LaVoie Hall, Room #113
Barry University
11300 Northeast 2nd Ave
Miami, FL 33161

Free Parking: You can park in front of Powers Hall by entering at the security gate on NE 111th St. If there is no parking there, you can park in the Landon South Facility and Staff lot, which is across the street. If you are unsure of where to park when you arrive, you can ask a public safety security guard.
~~~~~~~

Carpool: If you need a ride or can offer a ride, please let us know. We will coordinate carpools and connect you, but it is your responsibility to make sure you reach out to the people we connect you with!

Scripts: The scripts for Saturday's canvass are attached to this email. There are 4 scripts: ally (English), ally (Spanish), trans* (English), and trans* (Spanish). Please review the scripts that you will be using on Saturday. We will have copies ready for you when you arrive.

Videos: Please download the videos onto your smart phone, iPad, tablet, etc. before Saturday. We have limited amount of ad players, so we want to save the ad players for folks who truly need them.

DOWNLOAD HERE (https://tinyurl.com/June2015CanvassVids)

Instructions to sync the videos:
1. Go to the above URL and click "Download" in the top right corner to download the video onto your computer.
2. If you're using an Apple Device (iPhone, iPad, or iPhone), drag or import the video file into iTunes.
3. Connect your device to the computer, go into your devices' settings in iTunes, tell iTunes that you want to sync that file onto your phone, and then press "sync" or "apply".
4. Wait while iTunes syncs with your phone (this can take a little while).
5. When it's finished: disconnect your device, go into the videos app, find the video, and attempt to play it. If it works, you're good to go! *If you need to get the video onto your ANDROID phone, navigate to the URL above on your phone and download the file directly onto the device!

Final Notes: As usual, there will be an INVIGORATING training laced with dynamic role play action and charming jokes. We will have food and coffee waiting for you. If you are nervous or unsure of anything, please let us know during the confirm call. We take your happiness seriously and we want to make sure you feel great.

Please remember that we want to have a longer phone call conversation with you
before Friday about the research logistics, your comfort level when canvassing, and how we can best support you.

Example of Spreadsheet used to keep track of carpools duirng the confirm call process

	Riders					
Status (carpool confirm?)	**Name**	**Number**	**E-mail**	**From where?**	**Who's driving them?**	**Notes: Arrival time, 1st time vol, early bird, etc**

Drivers						
Name	**Number**	**E-mail**	**How many?**	**From where?**	**Who is in their car?**	**Notes: Arrival time, 1st time vol, early bird, etc**

SAVE // Info Session!

:05-:15 Introductions

- Name, Preferred Gender Pronoun, Anything about your identity that impacts why you're here (optional)
- What's at stake for you personally? Why does it matter to you to fight for LGBT rights & fight against discrimination?

:15-:20 Context about our work

- Our History: 8 min
  - SAVE: Organizing to reduce prejudice, LA LGBT Center (marriage canvass, research); VIDEO!
  - Goal Impact real policy that affect LGBT people, develop organizers in action who are skilled & committed to fighting prejudice & working for social change. Create a more supportive society by talking to conflicted voters
    - Students at the forefront of most social movements & making the difference between winning & losing; ex. University of Minnesota
- Non-Discrimination Context: 7 min
  - Reminders about the Context
    - In 29 states discrimination against gay & transgender people is legal!
    - On the ballot we lose 50% of the time
    - Alaska example 60% ☺ → 60% ☹
  - Trans Equality Passed in Dec but the opposition has pledged to repeal ! Opposition Message- & reactions

:30-:45 Discussion

- Why is this still a problem? Why do we still have to vote on non-discrimination? Why are people organizing against equal rights for LGBT people?
  - When people organize against our rights, what message does it send to us & those we love? What's the impact of having to keep fighting these fights – good & bad?

:45-:00 Strategy On-Campus & How you Fit in

- Be a resource to fight prejudice on all fronts in current and future fights
  - Not just on non-discrimination; other fights were prejudice is still a big problem
- Build a base of active volunteers & leaders
  - 5-50-500; different levels of participation needed
  - Reduce Transphobia

Kick-off Canvass @ FIU

- Saturday 1/24 9:30am-3pm @ GC 140
- Saturday 2/21 9:30am-3pm @ Room TBD

Other Activities @ SAVE

- Recruitment Phone Bank - Tuesday 1/27 Wednesday 1/28 6pm-9pm @ SAVE Office

Contact Information:
Charo Volero 786-442-8199, charo@savedade.org ||

I. Our #1 Priority as Community Organizers at an Action is Radical Hospitality (10 min)

- What does Radical hospitality look like? What does it sound like to you? What kind of environment does it create? **(5 min) (Brainstorm)**
    1. Welcoming environment!
        - A radical welcome is above and beyond what volunteers expect of a welcome. When they enter the building, are waiting at the sign-in area, in the training room, etc.
            - Gives a terrific, personable, friendly, welcoming impression of our organization
            - Keeps the action running smoothly
            - Helps people feel comfortable, valued and important
            - Encourages people to come back
    2. What does radical welcome look like?
        - Attitude and Action
            - Attitude:
                - Positive, upbeat and curious—guests are gods mentality
                - Organizers must wash away the stress and be on.
            - Action:
                - Introduce yourself, thank them for coming
                - Ask questions and have a real conversation
                    - Why are they here? Where are they from? Is there anyone in your life who makes this important to them?
                    - Share your story with them-why are you here? Be brief
                - Go above and beyond show them around, food, introduce them to people, bathrooms, greet as soon as they come in.
- **Let's Try It! (5 min)**
    1. 2 people, role play a greeting conversation
    2. **Debrief –** Reactions? What did you like that you want to try? What were good questions? Would you do something differently?

Hi is this _____? I'm_____ from SAVE. I'm calling for two reasons: First-to thank you for coming to our first research canvass! Because of your help, we are one HUGE step closer to finding out the impact one conversation has. So, thank you for being part of this. The second reason I'm calling you is to find out what you're canvassing experience was like because that is the only way we can improve our canvasses.

Friend: **Build a personal connection**	***Check-in about their experience***	• Was this the first time you canvassed? What was it like? What did it feel like to be doing research? • What were your conversations like? Did you feel like you made n impact? How? What stood out about the canvass? • What was it like canvassing on recycling? • What was your biggest takeaways from Saturday?
	Learn more about them- Build a relationship ***Get feedback or answer questions they may have***	• How did you first get involved? • Why do you care about the issue? Why did you get involved? What's most interesting or exciting about the work? • Do you have any questions about the work we're doing? • Do you have any feedback about the canvass for us? • What did you find most helpful on Saturday or before? ○ Do you have any feedback from the training? Any areas where we could be clearer? How about the script? Any feedback on the script? How about the debrief?

Activist: **Convey Urgency**	• During the month of June, we need to get 400 conversations, 200 on transgender equality, 200 on recycling. This past Saturday got a total of 135 conversations with 70 of those being on transgender equality. This means that we are well on our way to being measured. In fact, we might have preliminary results as early as the first couple weeks of July. **How does that sound to you? How is all of this research making you feel? Why is it important to you that we are measured?** ***Share your thoughts, feelings, and experiences.*** • With this data, I feel strongly that we are going to be one step closer to changing how our government treats and views transgender people. Across the nation, states and cities are facing threats of anti-transgender legislation just like Miami. In CA, for example, we might be voting on whether or not it is legal for someone to use a restroom that is different than the gender that is on their ID or birth certificate. We need to know how to educate voters, identify their concerns and effectively dismantle them so we can protect transgender people. **What do you think about that?** ***Share your thoughts.***

Banker: **Make a Clear, Specific Ask**	• In order to get the most out of this research, we are going to focus on developing 20-30 volunteers to be great prejudice-reduction canvassers. We are going to have group and one-on-one video viewing and coaching and we are going to canvass four more times in June: • We're canvassing: 1. this Wednesday June 10th from 5-9pm 2. Next Wednesday June 17th from 5-9pm 3. Saturday June 20th 8:45 am-4pm 4. Saturday June 27th 8:45 am-9pm **Can you put it in your calendar and prioritizes coming to all four canvasses so we can reach our goal of 400 conversations.** One way that we become better canvassers is by having about 10 volunteers come together and watch past canvass conversations. We talk about what the canvasser did really well, so we can try that at the next canvass. We're doing this on Thursday June 18th from 6-9pm at our office on Biscayne. **Can you come.** Laura Gardiner, one of our super fantastic staff, is coaching volunteers 1-on-1 to get better at canvassing. **Would like for her to reach out to you to schedule time to meet 1-on-1.** ***Second round if needed:*** Can you make this a priority and canvass with us this Saturday?

Understand Concerns	• What is keeping you from making a firm commitment to come? • How do you feel about canvassing (on this issue); do you have any concerns? • Have you done anything like this before? What was it like for you last time?

Address Concerns	***FAB! Go through Friend, Activist, Banker process again:*** *Build on personal motivation, emphasize important points or bring up points you didn't cover the first time* • *For newer canvassers: Share your experiences & describe what the day will be like* ***Scheduling Issue Tips*** *[Schedule uncertain]* When will you know your schedule so we can follow-up? *[Scheduling conflict that can't be rescheduled: After FAB, go to "Additional Ask" box]*

Logistics for 6/10 canvass	• **Address:** 8371 sw 27th lane (Emphasize lane!) • **Time:** 5-9pm. What time do you think you can get there? • **Carpool for canvass:** Do you need a ride to the canvass? Drivers: would you be able to drive? • **Parking:** We're meeting at marta's house. She is a volunteer with SAVE and one of our canvass leaders. You can park in her driveway or along the street, but don't park in the grass. • There will be a training, but it will be catered to what you need to feel good. Some people just need a quick role play and some folks need a little bit more support, so it's all about what you need. • There will be food! • Because this is a research canvass, we're hoping that people will canvass on their own and not shadow anyone. Do you feel comfortable canvassing and going door-to-door by yourself?

Trans*/GNC Retention and Follow-Up Call Script

INTRO: SET INTENTIONS OF CALL

Hi, is this _____? Hi, I'm _____ from SAVE. *How are you?*

I'm calling to follow-up and debrief from the last time you've volunteered with SAVE,
[If you know the last action they've volunteered at] I'm calling to follow-up and debrief you're experience *(insert action)* with us.

It's our highest priority to make sure all of our transgender/genderqueer/non-binary/gender non-confirming volunteers are supported in a meaningful way. We want to do everything in our control to make sure you feel good about this work. We know this work is tough and exhausting, so we are extremely grateful for your leadership and dedication to reducing prejudice.

[If you know this volunteer: be specific as to how the contribution of this volunteer has impacted you *and/or* **how you noticed this volunteer made a difference at SAVE** *and/or* **what you specifically appreciate about this volunteer]** *(The goal of telling the volunteer this is to have the volunteer understand how they are an essential part of this team)*

DEBRIEF ACTION AND FIND OUT WHAT VOL NEEDS TO BE MORE SUCCESSFUL

DEBRIEF OVERALL EXPERIENCE:

- Overall, how did you feel about *(insert action)*? How did you feel coming into the *(insert action)?* Did you have any expectations coming into the *(insert action)*? Was it more different or similar to what you expected? If so, how? What were your highlights and low lights? Did anything surprise you, either about yourself or *(insert action)*? If so, what and how? Any challenges?
    - Share your experience with *(insert action)*

IDENTIFY AREAS OF SUPPORT NEEDED:

- Are there any areas where you want to get better at *(IE: specific skills- telling your personal stories, coaching, coordination, training)?*
- Now that you've *(insert action)*, is there anything on our end that you think would be helpful in supporting other transgender-identified and gender non-conforming volunteers?
    - Share what thinking you have done around supporting transgender* and gender non-conforming volunteers

Based on what the volunteer says, make a plan to get what coaching and support the volunteer needs. This can look like inviting the volunteer to a video viewing or talking out their concerns right now over the phone. Afterwards, GO TO MAKE A PLAN AND ASKS.

MAKE A PLAN AND ASKS

Thank you for taking the time to speak with me about all of this. To wrap up, I want to go back your experience at *(insert action)*. What was exciting for you at *(insert action)*? Why?

Leadership and Canvass Ask
In order for us to continue to build a strong team of transgender and gender non-conforming volunteers, we need more transgender and gender non-conforming leadership.

Would you be interested in taking on a leadership role at our next canvass (and/or power summit)?
[If yes] What role sounds exciting to you? Each role strengthens different skills such as coordination, coaching volunteers before they go out to canvass, training, etc. Are there any specific skills that you want to strengthen?
[If no] Recruit for canvass and pushback

Power Summit Ask
[If yes] Go through power summit logistics and set-up 1-on-1 as instructed by Task Force
[If no] pushback

CONVERSATION IS NOT COMPLETE UNLESS A POWER SUMMIT ASK IS MADE

What is a 1-on-1?

Overview of what is a 1-on-1 (10 minutes)

Context: Establish the difference between surface level relationships and lasting, deep relationships. Provide a deeper understanding for what these types of relationships provide in the work for each other, our productivity, and our capacity building. The goal of a 1-on-1 is to build a relationship with a person and connect them to VFE (connect them to where even if you're not present at an action, they still want to get involved)

Intros: Check-in question: Who have you built stronger relationships with because of your internship? How did they become stronger?

Why are 1-on-1s important?

- Put a face to the work- real people are taking time out of their life for this cause- 1-on-1s are one of best ways to begin to create a supportive, safe space for new volunteers
- Matching skill & desired work with VFE's needs
- Learn people's motivation
- balancing a **genuine conversation** with **purpose** and focus
- Find ways to build AUTHENTIC relationships faster.

Three Major Components

- **Building a Relationship**
- **Deepening their commitment** to and understanding of the work
- **Creating a plan** to develop their skills and plug them into essential areas of VFE's work

BUILDING A RELATIONSHIP (20 minutes)

- Why is building a relationship important? Review what we know
    - Increase commitment to the work and to each other over long period of time (Movement building!)
    - Increase capacity – more people on the team who are thinking, learning and working hard.
    - Validating the people who come, valuing what we've all got to offer by learning what that is
        - Helping people see their value and what they have to contribute to VFE (and the world!)
    - Keeping people most motivated now and over the long haul – learning what motivates (treatment, types of action and involvement, etc.)
    - Learning how someone likes to be treated
    - Transparency & Vulnerability

Curiosity Exercise (15 min)

- 3 min - Brainstorm questions you might want to ask someone in a 1on1 to build a relationship
    - What are some open ended follow-up questions that will help you keep the conversation going
- 8 min - Pair off 4 min each to be curious about each other
- 4 min – Debrief & tips

Tips:

- Reciprocate and share yourself
- Learn now, might pay off later. Don't feel pressured to "figure someone out"
- Just because you see someone everyday doesn't mean you're building an intentional relationship
- Time ratios (Listening versus talking; time spent sharing VFE versus learning about the volunteer)

DEEPENING COMMITMENT – understanding of VFE's work (15 minutes)

What does it mean to deepen a commitment? It's talking about VFE's work in a motivational way and connecting the work to their life and what they're excited about. It's answering questions and giving more insider knowledge.

Popcorn: What's unique about what we're doing? What's been most motivating to you? What's deeper knowledge that they don't get from a regular training or recruitment call? How do pieces of our work relate to goals they have in their own life?

- REMEMBER: show-up rates from 1on1s versus other forms of recruitment. When we do this piece well, people really feel connected to the work and comfortable to volunteer. This allows for us to grow a solid, strong team and community.

QUIZ TIME: Why is deepening a commitment to this work essential for 1-on-1s?

Popcorn: Going back to the partner you had in the previous exercise, think about what you learned about them. How would connect what you learned about them to our work? How could you have deepened their commitment?

CREATING A PLAN (15 minutes)

What does it mean to create a plan?

- A specific ask- to prepare for the 1-on-1 brainstorm what you want to ask people to do. Throughout the 1-on-1, ask your yourself, is this still the right ask?
    - Ex: Before going into the 1-on-1, you want to invite this person to canvass on Saturday. By asking questions and learning about their interests and motivations, you find out that canvassing is not the right fit, but instead being a videographer is
- Figuring out their schedule and beginning to match them to areas of work. Create a system of accountability so the increased commitment and understanding can go somewhere.
- Balance and tone are important here. We don't want people to feel used – we're not using them; we're not forcing them. The goal is to EMPOWER & MOTIVATE them and then do something meaningful and significant with that. The goal is NOT to be manipulative, sneaky, or guilt tripping them into volunteering.

- **Accountability:** Keep track of what you ask for and follow-up about it. Have them put it all in their calendar. Write it down. Enter it into the van. Share it with staff. Share it with your wife. DON'T lose the 1on1.

    - Why accountability? Structure helps people, including ourselves, and we don't want to let people slip through the cracks and waste the work we did because we didn't take the time to make a plan and work with their schedule

What are you asking for in your 1-on-1s today?

- 10/17 movie screening
- 10/19 phone bank
- What else?

Intentional Relationship Building: through 1-on-1 Conversation

Why are 1-on-1s important?

- Put a face to the work- real people are taking time out of their life for this cause- 1-on-1s are one of best ways to begin to create a supportive, safe space for new volunteers
- Matching skill & desired work with AFE's needs
- Learn people's motivation
- balancing a **genuine conversation** with **purpose** and focus
- Find ways to build AUTHENTIC relationships faster.

Three Major Components

- **Building a Relationship is the basis for effective organizing**
- **Deepening their commitment** to and understanding of the work
- **Creating a plan** to develop their skills and plug them into essential areas of AFE's work

Why is building a relationship important?

- Increase commitment to the work and to each other over long period of time (Movement building!)
- Increase capacity – more people on the team who are thinking, learning and working hard.
- Validating the people who come, valuing what we've all got to offer by learning what that is
    - Helping people see their value and what they have to contribute to AFE (and the world!)
- Keeping people most motivated now and over the long haul – learning what motivates (treatment, types of action and involvement, etc.)
- Learning how someone likes to be treated
- Transparency & Vulnerability

1 on 1 Reminders!

- **Be generally curious WHO, WHAT, WHEN, WHERE, HOW**
    - Ask open ended questions with a real interest in the answers they're giving, their tone and body language and what else might be below the surface that they haven't yet said.
    - What is their stake in the issue? What is their passion? What could they give to the project? What do they like doing? How have they been involved in the past?
- **Ask 4-5 questions deep after your initial question**
    - Tell me more about that? What was the impact? How did that make you feel? Who was involved?
- **Listen actively**
    - 80:20 rule, should be listening 80% and talking 20%
    - Give them your full attention (even when there are distractions_ makes it clear that you actually value what they're telling then, not just asking them questions out of obligation.
- **Make a specific ask**
    - A specific ask- to prepare for the 1-on-1 brainstorm what you want to ask people to do. Throughout the 1-on-1, ask your yourself, is this still the right ask?

- **Accountability:** Keep track of what you ask for and follow-up about it. Have them put it all in their calendar. Write it down. Enter it into the van. Share it with staff. Share it with your wife. DON'T lose the 1on1.

Before Your 1 on 1

- **Reminder the day before.** Send a quick text or call to confirm your location and that you are excited to meet with them.
- **Be on time.** So simple and so important. If you flake, even just a little, your potential volunteer will be less likely to spend their energy and free time on you and your work.
- **Know the priorities and structure of your and be ready to explain it**. Context will help your volunteer better understand how they can help you and why it matters.
- **Have a list of questions ready to go and a path for the conversation** – Spend time before the 1 on 1 thinking why you value them as a volunteer, questions to get to know them and your ask.

Framework for a 1-on-1

1. **1 min Context:** Remind them why you are sitting down with them today and a simple frame work for how you see the conversation going
    a. Thank them for sitting down with you!
    b. Get to know each other > Understand their motivation and share yours > Talk about the priorities of our work (gauge interest and address concerns) > Make ask! > Know when you will see them next > hug if you are comfortable
    c. Ask how long they are able to meet for?

2. **10 min Background- Understand interest, values, motivation, what is their personal story?**
    a. Where are you from? Describe where you grew up?
    b. What is your family like?
    c. Volunteer work you have done in the past? What did your family teach you about community?
    d. What's most motivating work you have done before? What kind of role did you take?
    e. What was high school like for you? What were you involved with?
    f. Who was important in your development?
    g. What brought you to UCLA? What has been most meaningful for you?
    h. What makes you someone who takes action and wants to make a difference?
        i. Share your background- what makes you, you- be vulnerable

3. **5 min Understand their motivation and share yours Understand their stake in this work?**
    a. How did you first get involved in AFE? What caught your eye?
    b. What has been most rewarding about getting involved in our work? What has been most challenging? What are you most looking forward to in your involvement?
    c. Who is impacted by the work that we do?
        i. Share your motivation to be involved in this work

4. **10 min Talk about the priorities of our work and connect that to THEIR motivation!**
    a. **Describe Pocatello and Abortion priorities and you are motivated to do this work**
        i. What do they think about working on both issues? What's exciting? What's Scary?

ii. ***Share what why you are so invested in Non-Discrimination work and Abortion.***

b. **Describe why canvassing is the solution and learning how to educate voters is the solution**

i. Our goal is to reduce stigma and prejudice against these two groups.

1. Ask: how do you think we can accomplish that?

ii. ***Share your experience: why do you wake up early on a Saturday to do this really hard work***

iii. Educating and humanizing both women and Transgender people!

iv. In order to win these two fights we have to learn how to talk to fair minded voters and help them understand. The Leadership LAB is one of the only organizations that is working on this topic.

1. Ask: How do you feel about canvassing? What is exciting? What is scary? Have you talked to anyone about these two issues? What was it like?

v. Address concerns through your own Canvassing experience.

5. **10 min Make Ask!**

a. **Action Ask:** What is our # 1 priority? Getting folks to turn out to the canvass 2 days before we find out if we are in a campaign and the negative media floods open. **Can you join us on [Date] [Time] to learn how to educate voters? Do you need a ride?**

b. **Community Building Ask:** Club meeting Friday **4 to** 5pm

c. **Leadership Ask:** You said you have liked being involved in___ and you have done ___ in the past. I have noticed that you are great at____. We would love for you to take on more leadership within our work and have had this role in mind, we really value your____. Can you help us out with this?

i. **Describe how many hours, tasks, what they will gain from it, when you would meet next.**

6. **5 Min Make a Plan!**

a. **When are you going to meet with them next? When are you going to follow up with them?**

b. Thank them and tell them you really value them and why, give them specific positive feedback (again)

c. Hug them, high five them (if it seems like a good idea)

<u>Another Frame Work that I love more general</u>

Issues (Head) are the things people care about—problems they identify, concerns that they have about what is right and wrong, ideas for positive change. These are what get people riled up.

Values (Heart) are the core beliefs that motivate people to act—sense of justice, belief in equality, concern for other people and desire for fairness.

Interests (Tummy) are the *stake* a person has in an issue by virtue of their relationship to the issue. Someone's interest in an issue is the way they are connected to it.

Contributions (Hand) are what you bring to the table: what you are good at, what you know. It is the skills, networks, knowledge, and ideas that you bring to the table

Commitment (Foot) is what you are able to do with your skills and talents. It's the ability to act based on circumstances, education, experience, etc. Commitment goes with the foot, because it dictates how much the person will invest their contributions, time and energy.

POWER SUMMIT LEADERS TRAINING OUTLINE and Leaders Debrief

Session 1 Outcomes:

1. Each volunteer know their role for Saturday
2. Get to know each other as a leadership team
3. WHY: Understand the importance of canvass leaders
4. HOW: Learn the key components of radical hospitality and radical support

Session 2 Outcomes:

1. Each team breaks into respective teams and covers the highest priority aspects of each role.
2. Run through canvass scenarios and challenges for each role
3. What is new and different about this canvass?

Session 1 [30 minutes]

Facilitators:
Charo and Ella?

I. **CV** [3 min] **Welcome** everyone to the first session of our canvass leadership team meeting!!
   a. Trainer intros
   b. Agenda for the Day:
      i. Session 1: get to know each other and talk about the primary responsibilities and values of a canvass leader
      ii. Session 2: Right after dinner: Break into roles and do a canvass run through

II. **CV** [5 min] Quick **Introductions** of your Name, Role, where you are from and 1 word about what you like best about being a canvass leader

III. **EB 2 min Goal of the canvass:** besides dismantling transphobia we have a special goal for tomorrow and that is to teach folks from around the country and other organizations in Florida how we do what we do. This is critical because we are going to continue to face transphobic ballot measures and in order to win we need to try something new. That new think is canvassing and talking directly about transgender people.

IV. **EB 5 min Why are Leaders so Critical:** We can't achieve this goal without your amazing canvass leader support. Why are canvass leaders so critical to our canvass? And our movement? (write up on a flip chart)
   a. Highlight if not said:
      i. Canvass leaders set the tone for the entire day. We can build the canvass community we want one leader at a time.
      ii. Logistics and flow of the canvass
      iii. 1 on 1 and personal attention to every canvasser to ensure their individual needs are attended too

iv. Finding other new leaders

V. **CV 10 min Leader Values:** So in order to achieve and build the community that we to live in tomorrow we need to have some deeper values that we uphold as a team:
   a. **CV # 1 is Radical Hospitality** this something that many of you have heard before. Let's take a collective deep breath and close your eyes (if comfortable) and think back to the first time that you walked into a LAB and SAVE action. What was different? How did you feel? Why did you feel that way?
   b. With that experience in mind, what does radical hospitality look like? Why is it so critical? (write up on a flip chart)
      i. Each one of your jobs enable volunteers to get 1 on 1 support and attention so that they can move forward with the most confidence possible
      ii. Introduce your self and get to know each volunteer on a deeper level- What do those questions look like?
   c. **EB # 2 Radical Support,** how many of you have heard this term before?
      i. The most important piece of radical support is know that above all of the stress and little things that may go wrong tomorrow our #1 priority is to support our volunteers and support each other as a leader team.
         1. **Things will go wrong but we got this:** Start preparing your self that things will go wrong tomorrow and problem solving is part of the fun. We get to exercise. "We got this mantra" We are not teaching our national partners that everything runs perfectly. We are teaching folks that we have build a structure to problem solve when we need to.
         2. **Take care of yourself-** Make sure you are eating, drinking water, taking deep breaths, get good sleep tonight.
         3. **Ask for help-** your team has your back, canvass leaders will be wearing a different color name tag or beads.
         4. **Above all else when you get stressed, ask your volunteer how can I support you?**

VI. **EB 5 min Leader Values Check-Out**
   a. In pairs: Turn to someone next to you: What commitment can you make to yourself today so that you are able to uphold these values tomorrow?

[60 minutes] Session 2

I. **CV 2 min Hey everyone welcome back! Goals for session 2**
   a. Learn the ins and outs of your role
   b. Practice problem solving some tough issues

II. **EB** [10 min] Mingle game Finally I want to get our minging radical hospitably juices flowing.
    a. WE are going to spend the next 5 minutes playing the mingle game.
        i. Mingle, mingle, mingle, mingle
            1. Stop introduce your self and ask one of these questions
                a. What was your favorite moment of today?
                b. How did you get involved with this work?
                c. How are you feeling about canvassing today?
                d. What motivates you to fight and dismantle transphobia?
                e. Thinking about tomorrow what concerns you most?

I. CV [20 minute] Break out Sessions:

a. Pamela and Kelsey: Pod Leaders and Secondary Coaches
b. Agustin: Greeters
c. Virginia: Sign-in
d. Steve: Ad Player check-out
e. Trainers: Laura
f. Video team: Justin
g. Pod Assignment and QC: Ella
h. Set up: Charo

II. EB [10 min] Problem solving scenarios:

a. Pamela and Kelsey: Pod Leaders and Secondary Coaches
    i. What do you do when you have a pod with an odd number of canvassers?
    ii. You have a volunteer who REALLY does not seem ready to canvass no matter how much extra attention you provide. How do you support them?
    iii. You do not have enough cars in your pod to get everyone to turf? What do you do?
b. Agustin: Greeters
    i. You have a greeter team member who has a really bad morning and is not demonstrating radical hospitality. How do you support them?
    ii. You have a couple of volunteers standing all by themselves. How do you support them?
c. Virginia: Sign-in
    i. You have a pair of volunteers that swears you need to be paired together. What do you do?
    ii. You have a group of 10 people who show up 30 minutes after the training has started? What do you do?
    iii. A monolingual Spanish Speaker to sign in!
    iv. Task Force Staff comes to sign in and tries to walk past

d. Steve: Ad Player check-out
    i. What do you do when you run out of ad players?
    ii. After the canvass training there is about 10 people who do not have the canvass video and you are out of ad players. What do you do?
    iii. Someone comes up to you and says their ad player is not working?
e. Trainers: Laura
    i. Someone keeps interjecting in the training? What do you do?
    ii. One of your training partners freezes and forgets what to say next.
    iii. Your audience is having trouble hearing you in the back. What do you do?
f. Video team: Justin
    i. You can't get back in time to start the video break down process. What do you do?
    ii. You have too many videographers and not enough cameras
g. Pod Assignment: Ella
    i. You do not have enough drivers to the pod with the correct number of drivers? Who do you talk to?
    ii. You have an odd number of canvassers in the Spanish pods? What do you do?
    iii. You have a pair of people that swear they really need to be in the same pod. How do you support them?
    iv. You are feeling really stressed and begin to get short. What do you do?
h. QC:
    i. You are unable to get back from turf at the time that Ella and Charo have designated. What do you do?
    ii. You have a line of 20 people waiting for their material to be QC'd what do you do?
i. Set up: Charo
    i. It is 7:30 and everyone is standing around groggy not really doing much. What do you do?

III. EB 5 min New things for tomorrow:

a. ____ Person canvass we need everyone to get the videos on their phone. Please do this before you leave tonight. See Steve!
b. Safety and Problem Solving Stay Back Team: if anything happens in the field call the safety team! They are trained to yield calls and support each canvasser. We will also have someone who
c. Floater support problem solvers: Folks who can help in any way needed
d. Arrival times for each leader group
e. Have folks put in the canvass address into their phone

f. Leaders Debrief: Please be ready to discuss how we upheld our values and how we can do better.
g. How many of you are willing to be on film? Raise your hand?
h. Leader Scout

IV. EB/CV 5 min Q and A

V. EB Close out Chant

Post Canvass Leader Debrief [45 Minutes]

Facilitators:
Charo and Ella?

I. **CV [2 min] Welcome Back**! We did it!! Please give a high five a hug what ever you are comfortable with.
II. **EB [5 min] Why canvass leaders debrief?** Canvass leadership debrief are a very important piece of our canvass model. Even though we are tired, why do we facilitate leader debriefs at the end of our canvasses? (flip chart reasons)
    a. What impact does it have on you all as canvass leaders?
    b. Highlight if not said:
        i. It is the best way for us to learn how to improve every single canvass
        ii. Involves folks at every level to be part of the thinking
        iii. Problems solve large issues as a team
III. **CV [15 min] Debrief our Team Values:** First lets focus on the team values that we were focusing on through out today, how did we do? How did you personally do?
    a. Radical Hospitality? What was working? What was Challenging?
    b. Radical Support? What was working? What did you witness? What are you proud of? What was Challenging?
IV. **EB [15 min] Debrief Larger Canvass:** Ok lets look larger at logistics, flow, sign-in, training, script, debrief. Let's thinking about what was totally in our control. What was working that we want to keep doing
    a. Tell me more? What specifically enabled that? What are you picturing? Who helped make that happen?
V. **CV [5 min] Leadership Scouting**. We are always trying to grow and expand our community of leaders? Who did you see in your pods or interact with today who think would be a great potential canvass leader? Lets hear some names. Shout um out.
VI. [3 min] In it to win it and team picture

Miami April 9th Video Viewing @ SAVE Office

WELCOME!

- Welcome and thank you for being here
- Trainer Intros

AGENDA OVERVIEW (2 min)

- Learn who is in the room
- What we're doing and why (Big picture and tonight)
- Watch & Discuss videos
    - Goal: Observe, reflect and discuss actual conversations together
- Getting involved & Check-out

INTRODUCTIONS (10 min) **CHARO**

- Name
- Gender Pronouns - We share that so all of us can assert how we want to be referred to, and so we can respect and honor each other's identities.
- Anything about your identity you want to share – This is optional, but it's a chance to share the important pieces of who you are that might impact your involvement in this work.
- Your experience canvassing and why you came to watch videos with us tonight

WHO, WHAT, WHY (5 min) Laura

- Who are we?
    - The Leadership Lab is the political organizing department of the LA LGBT Center: Our work focuses on reducing prejudice towards targeted groups of people (marriage and abortion canvasses);
        - Face to face conversations are the best way to combat prejudice. Why?
        - In 900 research studies ours conversation model is the only one that has had a lasting impact on reducing prejudice
    - After learning the significant impact of our work, we wanted to know: Can we also reduce prejudice against other targeted groups and will this approach to conversation work on other policy issues?
    - That's what led to our partnership with SAVE!
        - We're working together this year to create a canvass model we hope will lastingly reduce transgender prejudice and increase support for trans-inclusive non-discrimination laws
- Problems we're facing on the TransEquality front: 4 min
    - While support for issues like gay marriage is increasing, that is not the case for the trans community
    - We win these fights 50% of the time and still have a lot to learn!
    - SPRINGFIELD Example
- Our part of the solution and where you come in:
    - We've been canvassing since January here in Miami (and in Los Angeles), to learn how we can have more effective conversations with voters and persuade (and educate) them to be more supportive of transgender people and non-discrimination laws
    - Our current canvassing project could provide us with an important tool for creating large, lasting change here in Miami and around the country – both with winning campaigns and shifting public opinion, one-by-one.

- Why we're here tonight
    - We've found viewing video together is one of the best ways to learn and improve our conversations and more quickly ascend that learning curve
    - It's going to take all of us doing the thinking AND doing together for us to improve
    - Explore the ways we build trust and connect with voters. Explore the ways this approach might be reducing prejudice and/or building support for transgender community.

So let's see some of these videos! But first…

GROUND RULES (3 min) **CHARO**

- "I" Statements (no universal truth)
- Speak from your experience
- No assumptions or judgment (i.e. about canvasser or canvasser's intentions)
- OK to disagree, (in respectful way)
- What else? (Brainstorm and add to flipchart; rip off of flip chart and tape on wall)

VIDEO VIEWING & DISCUSSION [35 min] ****HAND OUT PAPER AND PENS TO TAKE NOTES****

- Video 1: Nancy & Bonnie (15 min) [Stop at 9:20; Jump to 12:26 – 18:15]
    - SHOW VIDEO CLIP (that we show to voters) BEFOREHAND for those who haven't seen it
    - Disclaimer: Canvass in CA; we have full LGBT protections in place
    - Prompts to think about during video that we'll discuss afterward:
        - Newer folks: What do you notice about our canvassing model?
        - Returners: What do you notice about Nancy's canvassing approach? What happened as a result of that approach? *(Ex. When listening to the voter and asking questions, what happened for the voter? How did that impact the conversation?)*
        - How did the canvasser make an impact with this voter? What skills did she utilize?

- PARTNER SHARE (5 min)
    - Emotional check-in
    - Biggest takeaways and reaction to video
    - What was most surprising to you?

REPEAT Video viewing + Partner Share (25 min)

- Video 1: Dave & Carter (18 min)
    - How is Dave's canvassing approach different? Is it effective? How?
    - What concerns are coming up for this voter? Which are surface-level vs. deeper?
    - Did Dave make an impact with this voter? How?

GROUP SHARING/DISCUSSION (25 min)

- Share 1 thing each from partner reflections OR 1 thing related to the prompts

RECOMMITS & CHECK-OUT [15 min] **CHARO**

- 4/11 Canvass
- Power Summit Canvass
- Pride – Sunday parade
- Check-out **Question**: What is your biggest takeaway from tonight that you'll be thinking about when you canvass Saturday

Downey/Norwalk - 092014 - Abor - Turf 01

List 16101646-61431

Ali Nikseresht
7 Ceradon Cir
Chicago, IL 00001
Gender: M Age: 27
VAN ID: 12345678
Convo Type:
❑ Inaccessible ❑ Voter Not Home
❑ Voter Doesn't Live Here

❑ Voter Came to Door
❑ Lang Barrier w/ Voter
❑ Started Conversation
❑ Completed Script Page 1
❑ Completed Conversation
Confirm Type: *Trans Eq - Recycling*

Primary Convo Language: *Span - Eng*

Your Name:_____
Start Time:_____
End Time:_____
Voter's Phone:_____

Start Rating: 0-1-2-3-4-5-6-7-8-9-10

Post-Video Rating: 0-1-2-3-4-5-6-7-8-9-10

End Rating: 0-1-2-3-4-5-6-7-8-9-10

Recycling ID: *Agst - Und - Fav*

Terry Lavoie
125 Elm St
Allston, MO 00000
Gender: M Age: 27
VAN ID: 23456789
Convo Type:
❑ Inaccessible ❑ Voter Not Home
❑ Voter Doesn't Live Here

❑ Voter Came to Door
❑ Lang Barrier w/ Voter
❑ Started Conversation
❑ Completed Script Page 1
❑ Completed Conversation
Confirm Type: *Trans Eq - Recycling*

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Post-Video Rating: 0-1-2-3-4-5-6-7-8-9-10

End Rating: 0-1-2-3-4-5-6-7-8-9-10

Recycling ID: *Agst - Und - Fav*

Mark Sullivan
54 Tin Can Alley
Cambridge, IN 00000
Gender: M Age: 27
VAN ID: 34567890
Convo Type:
❑ Inaccessible ❑ Voter Not Home
❑ Voter Doesn't Live Here

❑ Voter Came to Door
❑ Lang Barrier w/ Voter
❑ Started Conversation
❑ Completed Script Page 1
❑ Completed Conversation
Confirm Type: *Trans Eq - Recycling*

Primary Convo Language: *Span - Eng*

Your Name:_____
Start Time:_____
End Time:_____
Voter's Phone:_____

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Post-Video Rating: 0-1-2-3-4-5-6-7-8-9-10

End Rating: 0-1-2-3-4-5-6-7-8-9-10

Recycling ID: *Agst - Und - Fav*

Rachel Cotton
84 Vermont Blvd, Apt 6E
Hyde Park, NV 00000
Gender: F Age: 27
VAN ID: 45678901
Convo Type:
❑ Inaccessible ❑ Voter Not Home
❑ Voter Doesn't Live Here

❑ Voter Came to Door
❑ Lang Barrier w/ Voter
❑ Started Conversation
❑ Completed Script Page 1
❑ Completed Conversation
Confirm Type: *Trans Eq - Recycling*

Primary Convo Language: *Span - Eng*

Your Name:_____
Start Time:_____
End Time:_____
Voter's Phone:_____

Start Rating: 0-1-2-3-4-5-6-7-8-9-10

Post-Video Rating: 0-1-2-3-4-5-6-7-8-9-10

End Rating: 0-1-2-3-4-5-6-7-8-9-10

Recycling ID: *Agst - Und - Fav*

Vlad Hristov
9453 Eastern Ave, Unit 54
Vidin, ID 00000
Gender: M Age: 27
VAN ID: 567890123
Convo Type:
❑ Inaccessible ❑ Voter Not Home
❑ Voter Doesn't Live Here

❑ Voter Came to Door
❑ Lang Barrier w/ Voter
❑ Started Conversation
❑ Completed Script Page 1
❑ Completed Conversation
Confirm Type: *Trans Eq - Recycling*

Primary Convo Language: *Span - Eng*

Your Name:_____
Start Time:_____
End Time:_____
Voter's Phone:_____

Start Rating: 0-1-2-3-4-5-6-7-8-9-10

Post-Video Rating: 0-1-2-3-4-5-6-7-8-9-10

End Rating: 0-1-2-3-4-5-6-7-8-9-10

Recycling ID: *Agst - Und - Fav*

Christopher Porter
24 Savannah Sunshine Lane
South Boston, AR 00000
Gender: M Age: 27
VAN ID: 678901234
Convo Type:
❑ Inaccessible ❑ Voter Not Home
❑ Voter Doesn't Live Here

❑ Voter Came to Door
❑ Lang Barrier w/ Voter
❑ Started Conversation
❑ Completed Script Page 1
❑ Completed Conversation
Confirm Type: *Trans Eq - Recycling*

Primary Convo Language: *Span - Eng*

Your Name:_____
Start Time:_____
End Time:_____
Voter's Phone:_____

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Post-Video Rating: 0-1-2-3-4-5-6-7-8-9-10

End Rating: 0-1-2-3-4-5-6-7-8-9-10

Recycling ID: *Agst - Und - Fav*