RAISE THE ROOTS
GRASSROOTS ORGANIZING FOR TAX FAIRNESS

BOSTON • JUNE 4-6, 2013

Presented by
THE TAX FAIRNESS ORGANIZING COLLABORATIVE

[Logo: United for Fair Economy]
WELCOME TO BOSTON!

We are so glad to have you with us at Raise the Roots 2013! We hope you find the next few days to be interactive, informative, and — something not typically associated with tax policy — fun.

Your workshops will cover a variety of areas that are critical to organizing and mobilizing your communities for policies that will meet the needs of all people in your states. Our program is geared toward integration. We wanted to create a learning space that offers diversity of ideas and perspective — across race, gender, class, generation, movement, and even sector.

While you are here, you will also have the chance to connect with other committed individuals working on-the-ground to build a better economy. Our work for economic justice and racial equity can only grow stronger if we learn and share with each other beyond state lines and if we identify ways to unite in common purpose.

Thank you for your time, energy, and ideas. We’re excited to collaborate with you this week and beyond.

In solidarity,

The Staff of United for a Fair Economy

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Share Your Raise the Roots Experience!

TAG YOUR TWEETS: #RaiseTheRoots

POST TO THE TUMBLR: Email written reflections, links, videos, and photos to kastood55@tumblr.com with your post title in the subject line. See what others are sharing at raisetheroots.tumblr.com.

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The Tax Fairness Organizing Collaborative (TFOC) — a project of United for a Fair Economy — is a network of organizations working to build grassroots political power for progressive tax and economic policies at the state level. Today, the TFOC includes grassroots organizations in 22 states.

The TFOC operates on two core beliefs:

1. A fair tax system is one that is progressive, transparent and that generates revenue that will adequately fund quality public services and provide opportunities that enable all people to thrive.
2. Broad participation of people at the grassroots level is integral to achieving long-term political change.

United for a Fair Economy is a national organization that spotlights the causes and consequences of extreme inequality and racial disparities in our economy and society. We elevate solutions ranging from policy reforms to community-oriented means of building wealth and political power, particularly where our political system is failing to generate significant progress.

CONFEERENCE COORDINATORS

Michael Young
Michael is the TFOC Project Director. Before joining UFE, he organized for safe and affordable mortgage products for low-moderate income Massachusetts residents and worked to ensure banks were fulfilling their Community Reinvestment responsibilities.
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Monica Vesga
Monica is the program associate for the TFOC. Originally from Colombia, she grew up in the California Bay Area, where she was involved in the non-profit sector through inner-city youth advocacy and cultural education.
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**QUICK GLANCE SCHEDULE**

**Tuesday, June 4th**

5:30-6:00 pm  **Welcome!**

6:00-7:30 pm  **Special Advanced Film Screening: Inequality for All**  
A Reel Economy community engagement event, presented by United for a Fair Economy and Working Films; at the Brattle Theater (40 Brattle St. in Harvard Square)

7:30-7:45 pm  **Taking the Pulse: Audience Reflections**

7:45-8:45 pm  **Organizing for Success: Trends & Challenges in State Tax Policy**  
With Meg Wiehe (Institute on Taxation and Economic Policy), David Gray (Louisiana Budget Project), Broderick Bagert (Together Baton Rouge); moderated by Steve Schnapp (United for a Fair Economy)

9:00-10:30 pm  **Social Hour (and a half)**  
Join UFE and Working Films at Harvest (44 Brattle St; next door to Brattle Theater) to mix, mingle, and continue the conversation about how together we can fight inequality and build a more equitable economy.

**Wednesday, June 5th**

9:00-9:15 am  **Welcome!**

9:15-10:30 am  **From Online to Offline Engagement**  
With Matt Nelson (Color of Change), Tom Louie (Progressive Communicators Network), and Tracy Van Slyke (The New Bottom Line)

**Don’t Be A Talking Head: Interactive Strategies for Political Action**  
With Steve Schnapp (United for a Fair Economy), Brian Miller (United for a Fair Economy), and Shannon Masden (Colorado Progressive Coalition)

10:30-10:45 am  **Break**
**Wednesday, June 5th (cont’d)**

10:45-12:00 pm   **Engaging Business Leaders & Wealthy People in Your Campaigns**  
With Jessica Morneault (Responsible Wealth)

**Enhancing Organizing with Data and Technology**  
With Brad Lichtenstein (BizzVizz) and Amy Ngai (Sunlight Foundation)

12:00-1:15 pm  **Lunch**

1:15-3:30 pm  **From Seats to Streets: Using Film to Move the Masses**  
With Andy Myers and Molly Murphy (Working Films)

**School for Creative Activism: Creativity & Action in Organizing**  
With Steve Lambert and Stephen Duncombe (Center for Artistic Activism)

3:30-3:45 pm  **Break**

3:45-5:00 pm  **Youth Organizing: Engaging Young People in Activism & Campaigns**  
With Will Buford (Funders’ Collaborative for Youth Organizing), Laura Diamond and Pema Doma (YMORE), and Chris Messinger (Boston Mobilization); moderated by Marie-Frances Rivera (Hyams Foundation)

**Thursday, June 6th**  (NOTE: For TFOC members only)

9:00-10:15 am  **Robin Hood is STILL Right**  
With Alyssa Aguilera and Robert Tolbert (VOCAL-NY), Ron Deutsch (New Yorkers for Fiscal Fairness), Jennifer Flynn (Health-Gap), and Karen Orenstein (Friends of the Earth)

10:15-10:30 am  **Break**

10:30-11:45 am  **The Ideal[ized] Tax Model**  
With Karen Kraut (formerly of United for a Fair Economy) and Dave Shreve (Virginia Organizing Project)

11:45-1:00 pm  **Lunch & Participatory Planning Process**
WORKSHOP DESCRIPTIONS

Tuesday, June 4th

5:30 pm to 8:00 pm

Special Advance Film Screening: Inequality for All
With Robert Reich as our guide, the feature film INEQUALITY FOR ALL explores the causes and consequences of the widening income gap in the United States and asks what it means to the future of our economy and our nation. The film premiered at the Sundance Film Festival where it won the Special Jury Award and was acquired by TWC-RADiUS. It will be coming out in theatres this fall.

8:30 pm to 9:00 pm

Organizing for Success: Trends & Challenges in State Tax Policy
Regressive state tax policy is the new holy grail of the Right. Our panel will discuss the role of special interests with big money — the winners in this era of austerity — in our state legislatures; their effects on tax and budget policies; and their longer-term impacts on inequality. We will discuss a case study in Louisiana — in which allies used a combination of sound policy research and effective grassroots organizing — to learn how we can lay stronger groundwork for battles we can win in state capitols.

• Broderick Bagert, Together Baton Rouge
• David Gray, Louisiana Budget Project
• Meg Wiehe, Institute on Taxation and Economic Policy
• Steve Schnapp, United for a Fair Economy (moderator)

Wednesday, June 5th

9:15 am to 10:30 am

From Online to Offline Engagement **
This workshop will introduce you to best practices of online and offline engagement. What is the relationship between online and offline organizing strategies and how do they relate to your campaign goals and strategies? Topics will include online organizing tools, offline tactics, the ladder of engagement, collecting data/evaluations, campaign/organizing synergy, and case studies.

• Tom Louie, Progressive Communicators Network
• Matt Nelson, Color of Change
• Tracy Van Slyke, The New Bottom Line
Don’t Be A Talking Head: Interactive Strategies for Political Action **
Talking about tax policy in most venues draws yawns and glazed eyes. Powerpoints do little to help and sometimes make things even more unbearable. We will model workshop exercises that get people out of their seats and fully engaged in the learning process together. We will also review the core principles of popular education and discuss ways to apply them to your own organizing efforts.

- Shannon Masden, Colorado Progressive Coalition
- Brian Miller, United for a Fair Economy
- Steve Schnapp, United for a Fair Economy

Engaging Business Leaders & Wealthy People in Your Campaigns **
This session will take a look at campaigns that have successfully engaged wealthy people and business leaders. We'll examine the characteristics of successful campaigns and discuss ways to strategically involve your affluent allies. There will be discussion of best places to locate and connect with wealthy people, as well as organizations and resources available for support.

- Jessica Morneault, Responsible Wealth

Enhancing Organizing With Data & Technology **
Have you ever wondered how technology and data can transform your campaign? If so, join us for this workshop that’ll demystify the process of how to turn your data-driven ideas into reality. Amy Ngai from the Sunlight Foundation will discuss the types of open source data that are available and illustrate examples of implementation. In addition, Brad Lichtenstein from BizzVizz will share his experience creating a data-driven app for his film As Goes Janesville. The workshop will provide concrete examples and lessons learned to help you design and create your own campaign tools for change.

- Brad Lichtenstein, BizzVizz
- Amy Ngai, Sunlight Foundation

** indicates concurrent workshops
Wednesday, June 5th (cont’d)

1:15 pm to 3:30 pm  **From Seats to Streets: Using Film to Move the Masses**
How can films advance economic fairness campaigns? This interactive session will focus on leveraging the stories and distribution of documentary films — online and off — to amplify your messages, expand your base of support, reach and rally target audiences, build coalitions, and influence decision makers. The workshop will offer a framework, specific case studies, time for planning, and discussion about using film as an asset in your ongoing work.

- Molly Murphy, Working Films
- Andy Myers, Working Films

1:15 pm to 3:30 pm  **School for Creative Activism: Creativity & Action in Organizing**
The first rule of activism is to know the terrain and use it to your advantage. The School for Creative Activism is designed to help grassroots organizers build more effective campaigns by using creative strategies that tap into and mobilize the signs, symbols, stories and spectacles that comprise our culture. Incorporating insights from art practice, cultural theory, and social movement history, this hands-on workshop will introduce participants to the practice — and promise — of creative activism.

- Stephen Duncombe, Center for Artistic Activism
- Steve Lambert, Center for Artistic Activism

3:45 pm to 5:00 pm  **Youth Organizing: Engaging Young People in Activism & Campaigns**
The cross-generational aspects of young people and adults working together can be politically powerful. This panel will hone in on the intersection between progressive tax campaigns and youth organizing and leadership development. Our panel will highlight the importance of inviting youth partners into your campaigns and share strategies for success from both programmatic and funder perspectives.

- Will Buford, Funders’ Collaborative for Youth Organizing
- Laura Diamond, Youth of MA Organizing for a Reformed Economy
- Pema Doma, Youth of MA Organizing for a Reformed Economy
- Chris Messinger, Boston Mobilization
- Marie-Frances Rivera, Hyams Foundation (moderator)
Robin Hood is STILL Right

You’ve heard of Robin Hood — he and his justice-seeking troop took from the rich and gave to the poor. The Robin Hood tax follows the same logic. The ‘rich’ are Wall Street, big banks, and investment firms; the ‘poor’ are the rest of us — working people and the jobs, health care, education, and infrastructure we all count on. This tiny tax of no more than one-half of 1% on financial sector transactions can generate hundreds of billions each year and help to curtail the sort of high-risk trading practices that brought about the Great Recession. This workshop will provide information on the national Robin Hood Tax Campaign and why TFOC members should get involved.

- Alyssa Aguilera, VOCAL-NY
- Ron Deutsch, New Yorkers for Fiscal Fairness
- Jennifer Flynn, Health-Gap
- Karen Orenstein, Friends of the Earth
- Robert Tolbert, VOCAL-NY

The Ideal[ized] Tax Model

This workshop will explore the TFOC conceptualized “Idealized State Tax Model” and show how a bold vision for state tax policy can push back against the right wing assault in our state houses, while also giving us all a path towards a truly progressive state structure. We will explore the concepts in the model, discuss how to answer the critics, and share the beginnings of a popular education module. Your feedback and ideas are critical, and we welcome them in this discussion and beyond!

- Karen Kraut, former TFOC Project Coordinator
- Dave Shreve, Virginia Organizing Project
PRESENTERS & PANELISTS

Alyssa Aguilera | VOCAL-NY
Alyssa is the Political Director for Voices of Community Activists and Leaders (VOCAL-NY), a grassroots organization building power among low-income people impacted by HIV/AIDS, the drug war, and mass incarceration to build healthy and just communities. She coordinates VOCAL-NY’s political work at the city, state, and federal levels. Before joining VOCAL-NY, Alyssa was a community organizer with a focus on the intersection of public health and civil rights.
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Broderick Bagert | Together Baton Rouge
Broderick is a Lead Organizer for TBR and has 11 years experience working for justice with the Industrial Areas Foundation, the nation’s oldest and largest community organizing network. He has organized campaigns on tax policy, public transportation, housing, healthcare access, immigration, criminal justice, and more. Broderick was also co-founder of the Morris Jeff Community School, a progressive, community-based charter school in New Orleans.
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Will Buford | Funders’ Collaborative on Youth Organizing
Will is the Manager of Operations and Development of the Funders’ Collaborative on Youth Organizing. Before joining FCYO, he worked in higher education and strategic communications in both the corporate and non-profit sectors. Will is a founding member of the Young Friends of Union Settlement, a volunteer and fundraising committee supporting the Union Settlement Association in East Harlem.
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Ron Deutsch | New Yorkers for Fiscal Fairness
Ron is the Executive Director of New Yorkers for Fiscal Fairness, a statewide advocacy organization that focuses on coalition building/organizing around issues of fair taxation and economic justice. He has been an advocate for social and economic justice for 20 years in Albany and has worked on many successful campaigns that have closed corporate tax loopholes and instituted higher income tax rates on the wealthiest New Yorkers.
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Laura Diamond | Youth of Massachusetts Organizing for a Reformed Economy
Laura is finishing 9th grade at Winchester High School and her leadership and passion for civic engagement are already very pronounced. As a YMORE Student Community Organizer, she organizes her peers to attend legislative meetings, leads teen workshops on class and wealth, and sends op-eds to her local paper.
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Pema Doma | Youth of Massachusetts Organizing for a Reformed Economy
Pema is a graduating senior at Brookline High School and has been a community organizer with Boston Mobilization and YMORE since 2010. She has been a key YMORE representative in campaigns for progressive revenue in Massachusetts and efforts to block ballot initiatives that would have resulted in dramatic tax cuts.
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Stephen Duncombe | Center for Artistic Activism
Stephen is co-founder and director of the Center for Artistic Activism. He has over two decades of experience as a teacher and an organizer and is currently an Associate Professor of Media and Politics at New York University and is author and editor of five books, including Dream: Re-Imagining Progressive Politics in an Age of Fantasy and the Cultural Resistance Reader. His writings have appeared in a wide range of scholarly publications, including The Nation, The New York Times, and Playboy.
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Jennifer Flynn | Health-Gap
Jennifer is the Managing Director at Health-Gap, an organization dedicated to providing access to treatment and resources for people with HIV/AIDS. She was co-founder and Executive Director of the organization that is now VOCAL-NY, where she organized around welfare rights, homelessness, drug user rights, and immigration.

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David Gray | Louisiana Budget Project
David is a State Policy Fellow with LBP. His extensive academic and professional background has provided him with expertise in public policy analysis, community development, legislative campaigning, and other skills and knowledge that are key to social justice organizing.

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Karen Kraut | Former Tax Fairness Organizing Collaborative Project Coordinator
Karen is the former Coordinator of the Tax Fairness Organizing Collaborative and led the development of the TFOC’s Idealized Tax Model. She is co-author of UFE’s report, Flip It to Fix It: An Immediate, Fair Solution to State Budget Shortfalls, and wrote the article, “High Stakes: Why and How Nonprofits Must Engage on State Tax Policy.”

Steve Lambert | Center for Artistic Activism
Steve’s father, a former Franciscan monk, and mother, an ex-Dominican nun, imbued the values of dedication, study, poverty, and service to others — qualities which prepared him for life as an artist. His work has been shown at marches and museums nationally and internationally, has appeared in books, documentaries, and even in the United States Library of Congress. For Lambert, art is a bridge that connects uncommon, idealistic, or even radical ideas with everyday life. Currently, Steve is also an Assistant Professor of New Media at SUNY Purchase. He dropped out of high school in 1993.

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Brad Lichtenstein | BizzVizz
Brad is an award-winning filmmaker and president of 371 Productions, a media technology company that produces social issue documentaries, public engagement campaigns, technology projects, and a lot more. His documentary, As Goes Janesville, shows workers in a Wisconsin factory town trying to reinvent their worlds amid the Great Recession and political warfare over unions. 371 is launching BizzVizz, a mobile app that provides users with information about whether companies are living up to their social responsibilities.

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Tom Louie | Progressive Communicators Network
Tom is the Coordinator of the PCN Boston/New England chapter. He is a long-time organizer, public policy advocate, and media skills trainer who works primarily with grassroots and community-based groups in the Greater Boston Area.

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Shannon Masden | Colorado Progressive Coalition
Shannon is a Field Organizer with the Colorado Progressive Coalition. She has worked on a number of legislative campaigns and ballot initiatives related to an array of social and economic issues. Before joining CPC, she organized the LGBTQ community to advocate for progressive policies in Colorado. She is forever learning how to be a better organizer, ally, and guitarist.

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Chris Messinger | Boston Mobilization

After brief unsuccessful stints as a baker and innkeeper, Chris discovered that classroom teaching was also too difficult. So, he started Sub/Urban Justice, a youth program focused on building regional power. Then he accidentally ended up as Executive Director of Boston Mobilization, a peace and justice non-profit founded in 1977. His work over the last six years has focused on funding for education and youth services and stopping right-wing tax cut initiatives in Massachusetts.

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Brian Miller | United for a Fair Economy

Brian Miller is the Executive Director of UFE and co-author of The Self-Made Myth and UFE’s annual State of the Dream reports. He has 19 years experience working for social change, starting as an organizer in Louisiana and eventually making his way to Tennessee, where he led Tennesseans for Fair Taxation, a TFOC member group, for a dozen years.

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Jessica Morneault | Responsible Wealth

Jessica organizes business leaders and wealthy individuals for UFE’s Responsible Wealth project. After earning her Master’s in social work from the University of Connecticut, she worked with the National Priorities Project, helping to get young people involved in conversations and campaigns related to federal spending.

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Molly Murphy | Working Films

Molly is the Interim Co-Director of Working Films. She has planned and directed national community engagement campaigns, facilitated cross-organizational partnerships and coalitions, and developed and led grassroots organizing trainings aimed at incorporating documentary films in strategic efforts to advance social justice.

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Andy Myers | Working Films

Andy is a director and the Community Engagement Coordinator for Working Films. He has an educational background in film studies and, before joining Working Films, was the Film Series Coordinator for the Environmental Concerns Organization, where he organized screenings, panels, and action-oriented receptions. He has experienced first hand the power that non-fiction film can exert over political apathy.

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Matt Nelson | Color of Change

Matt Nelson is the Organizing Director at ColorOfChange.org, the nation’s largest online civil rights organization. As a campaign strategist, organizer and communications expert, Matt has trained and mentored hundreds of community leaders and organizers around the country, and has started four successful small businesses that promote alternative economic structures, including the first fair trade, worker collective café in Milwaukee, WI.

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Amy Ngai | Sunlight Foundation

Amy is the Partnership and Training Manager at the Sunlight Foundation, where she works to engage the public on the use of data to promote transparency and open government. Her work involves relationship building with non-profit and private sector partners to unlock and generate innovative uses for government data. Amy also spearheads Sunlight Academy, an online portal to tools and resources pertinent to the open government community.

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Karen Orenstein | Friends of the Earth
Karen is an International Policy Analyst at Friends of the Earth U.S. Her work is focused on international climate finance. In other words, she campaigns to get the U.S. and other rich countries to fund developing countries’ efforts to adapt to the unavoidable impacts of climate change, reduce greenhouse gas emissions, and develop ecologically sound pathways. Karen has over a decade of grassroots advocacy experience in environmental and international human rights campaigns.

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Marie-Frances Rivera | Hyams Foundation
Marie-Frances is a Program Officer at Hyams Foundation, where she focuses on structural race analysis in their Teen Development area. Prior to joining Hyams, she was a Program Manager of the SMILES Mentoring Program, where she helped students achieve educational and personal potential. Marie-Frances is committed to using her academic and professional experiences to bring positive change to low-income communities and communities of color.

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Steve Schnapp | United for a Fair Economy
Steve helps design and develop UFE’s popular economics education workshops and materials and leads UFE workshops and Training of Trainers Institutes around the country. He studied popular education with Dr. Jane Vella, taught community organizing at Boston University, and has nearly 40 years experience as a community organizer, educator, and activist in New York City and the Greater Boston area.

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David Shreve | Economist & Author
Dave is a consultant specializing in macroeconomic theory and intellectual history, presidential political economy, fiscal federalism, and the political economy of taxation. He is a former professor of economic history at the University of Virginia and a former budget analyst for the Louisiana House of Representatives. He is the editor of seven volumes in W. W. Norton’s presidential recording series, the author of numerous articles on economic policy and history, and the author of the forthcoming book, American Promise: The Triumph and Eclipse of the Keynesian Revolution, 1961-1974.

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Robert Tolbert | VOCAL-NY
Bobby has been HIV positive since 1995, became a VOCAL-NY member in 2005, and joined the board in 2010. Today, he is a Peer Health Educator for the organization and has led campaigns ranging from expanding access to resources for drug users to awareness raising campaigns to hold Wall Street accountable for the financial crisis.

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Tracy Van Slyke | The New Bottom Line
Tracy is the co-director of The New Bottom Line, a new and growing movement fueled by a coalition of community organizations, congregations, and individuals working together to challenge established big bank interests on behalf of struggling and middle-class communities.

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Meg Wiehe | Institute on Taxation and Economic Policy
Meg is the State Tax Policy Director for ITEP, where her role is to make clearer the impacts of state tax policy on families across the U.S. Prior to joining the ITEP team, Meg provided research and advocacy support to help enact progressive tax policies in North Carolina.

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