Blueprints for Change

Progressive Organizing and Campaigning Manual

2019.11 Edition

14 detailed how-to guides on cutting-edge approaches that draw on the combined knowledge of **over 100 kickass progressive campaigners, organizers and groups** that tried and tested these strategies across the world.

Guide reviews from our community:

"Fantastic initiative and a bunch of very valuable resources, thank-you!" - Crina
"A thousand thank-yous and 🙌! This is awesome!" - Eugene
"Incredible intel + insights and practical" - Mel

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Welcome: Please read

This manual was put together thanks to the volunteer efforts of over 100 progressive campaigners, organizers and groups. Each guide contained within compiles the experiences and perspectives of several thinkers and doers and has been revised and edited by our helpers and invited contributors.

These guides are never considered "finished" and they are constantly being updated in google doc form on our website: blueprintsfc.org. This manual will also be updated at least once a year to reflect guide updates and also to include new topics.

If you would like to participate in this project or see something that should be corrected or added in any guide, please contact us at blueprintsfc@gmail.com.

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About Blueprints for Change

Blueprints for Change is an open library of advocacy how-to's put together by campaign innovators in order to help progressive organizers and groups up their game more quickly.

The "blueprints" we are talking about are collaborative how-to guides designed to capture, communicate and inform innovative campaigning strategies and tactics. This project focuses on how-to's drawn from campaigning practices that are *emergent* (new and not yet fully documented), *in demand* by campaigning groups and *field-proven* (have been applied with success in prior campaigns).

>>See our full editorial guidelines and process in the Appendix

Our guide topics are sourced from community requests and are then co-created and peer-reviewed by a dedicated crew of volunteer helpers as well as a network of practitioners, organizers, and researchers who have experience bringing this work to life.

>>See the full list of our helpers and contributors in the Appendix

The goal of this project is to co-create useful resources that help organizers and campaigners around the world "up their game" quickly. With more agile strategies and execution, we'll be better equipped to make progressive social change happen at a time when we really need more of it. We want to compile knowledge and direct experience to make shared best practices freely accessible for as many progressive campaigners as possible. We also want everyone who contributes to feel respected and empowered in the process.

>>Find our complete values statement in the Appendix

We're always looking for more good people to help with this. Want to join us? Write us to find out how at: blueprintsfc@gmail.com

Section 1.

New organizing and campaigning strategies

The widespread adoption of digital tools in many areas and the new habits and instincts that have emerged as a result have led to the growth of new approaches to organizing and campaigning. Mostly, these take advantage of ways to organize and mobilize people power at scale and in ways that were beyond our reach in the past.

New Organizing and Campaigning Strategies

Guide Summaries: Click on titles to go directly to the guides

BUILDING NETWORKED COALITIONS

When multiple groups and organisations come together to work on a campaign, they often opt to collaborate together in a coalition. Coalitions, however, have garnered a reputation for causing campaigners headaches due to their frequently slow, bureaucratic and top-down decision-making processes. In this guide, we look at an alternative way of building powerful collaborative campaigns. Networked coalitions, also called "networked campaigns", harness the power of networks to develop more agile, dynamic and distributed campaigning coalitions that have proven themselves to be remarkably effective at building and channelling collective power.

DISTRIBUTED ORGANIZING

Distributed organizing (as opposed to community organizing or traditional political organizing) activates a network of self-starting supporters/campaigners in multiple locations, which can spread across geographical boundaries, interests and cultural groups. It draws on the initiative and energy of volunteer organizers to start groups and lead teams with varying degrees of autonomy. Though more horizontal when compared to traditional "command and control" leadership, distributed organizing often relies on a central coordination group to launch the network and to drive it towards common goals and milestones. When done properly, it can help a movement or campaign scale rapidly and channel huge amounts of collective power.

PERSUASIVE CONVERSATION CAMPAIGNS

Persuasive conversations, also known as values-based conversations, are exchanges between advocates and their peers or members of the public that surface personal attitudes and perceptions around social issues to shift existing positions or at least open people to a new perspective. These conversations are typically held around polarizing issues — think marriage equality in the United States circa 2008-2015 or Australia more recently — where wider shifts in attitude could result in beneficial policy changes.

BUILDING NETWORKED COALITIONS

Summary of: Building Networked Coalitions

When multiple groups and organizations come together to work on a campaign, they often opt to collaborate together in a coalition. Coalitions, however, have garnered a reputation for causing campaigners headaches due to their frequently slow, bureaucratic and top-down decision-making processes. In this guide, we look at an alternative way of building powerful collaborative campaigns. Networked coalitions, also called "networked campaigns", harness the power of networks to develop more agile, dynamic and distributed campaigning coalitions that have proven themselves to be remarkably effective at building and channeling collective power.

Why do we need to do coalitions differently?

Traditional coalitions are heavily focused on building consensus among members, most often on very specific policy goals. Getting a set of diverse groups, who may align around a broader shared purpose, to align on specific asks and plans leads to slow and often exasperating decision-making processes. Focusing on narrowly defined issues also means that traditional coalitions have a tendency to fizzle out once the issue is out of the media or policy cycle.

Traditional coalitions are often characterized by top-down, centralized planning processes, in which a core group of coalition partners develop a joint strategy that members are then expected to adhere to. This means that coalitions can be slow to adapt to the dynamic contexts in which they operate and their plans can quickly become obsolete when these contexts change. Focusing on rigid operational plans also limits the abilities of coalition members to innovate on the ground.

Who's doing networked coalitions well?

Re-Amp brings together over 130 nonprofits and foundations working on climate change and energy policy across eight Midwestern states in the U.S. with the goal of reducing global-warming pollution. Halt the Harm has built a network of 1,300 group leaders and 14,000 members across the U.S. to halt the harms of fracking in their communities. The Power Shift network is a national community of organizations who work with young leaders to campaign for climate justice.

In Australia, the Lock the Gate Alliance brings together people from across the country to protect the land, water and communities from risky coal mining, coal seam gas and fracking. The Gasfield Free Northern Rivers movement brings people together to protect the biodiversity, water resources, agricultural lands and sustainable industries of the Northern Rivers from the impacts of coal seam gas and other forms of unconventional gas mining.

Several campaigns focused on privacy, censorship and surveillance in the tech world have been operating in networked coalitions including Team Internet, which brings together nonprofits, companies and individuals to lead the Battle for the Net campaign for net neutrality, and SaveTheLink which campaigns against link censorship. Similarly, the Canadian-led Stop Stingray Surveillance campaign brings together NGOs and companies from multiple countries to put a stop to invasive Stingray cellphone surveillance.

Change the Terms, a U.S. based coalition that spans human rights, civil rights, consumer protection, and technology organizations, is fighting to reduce hateful activities online.

At the city level, three inspiring networked coalitions are The Sydney Alliance, which brings together over 40 religious, union and community organisations to use community organising to make Sydney a better place to live. Its global network - the Industrial Areas Foundation - does similar work in over 80 cities around the world. Reclaim the City is a loose network of leaders and partner organisations dedicated to desegregating inner city Cape Town through radical strategies like occupations, in order to campaign for affordable housing. Finally, the Moscow City Alliance, and associated city based networks in Moscow, have campaigned in defence of green space and against demolitions, relying on the support of formal NGOs and informal local groups scattered across the city.

What do networked coalitions look like and how can they benefit a campaign?

Many coalitions come together to achieve a specific policy goal and develop a shared plan to achieve it. On the other hand, members of a networked coalition unite around a broader cause or purpose. For example, the Halt the Harm network brings together groups across the United States under the banner of “halting the harms of fracking” in their communities. The Environmental Law Reform Coalition is another example. This coalition built a lot of power by coming together behind a "Let's Get it Right" frame. The frame is clear and succinct and it broad enough to include a bunch of environmental laws. On the other hand, networked coalitions can come together around a shared commitment to social change. We see this in Sydney Alliance’s commitment to community organizing, or Lock the Gate’s commitment to literally “locking the gate” - a form of civil disobedience that prevents mining companies from accessing the land.

Focusing on broader missions like this make networked coalitions more suited to working on longer-term, systemic change, while also making it easier for ***larger diversity of members*** to get behind the cause (sometimes leading to unlikely alliances).

Networked coalitions start from the premise that within every coalition there is a network of people (staff, members of groups, activists, supporters, etc.), and this network can either be functional or dysfunctional. How functional this network is in practice is not necessarily dependent on the strength or degree of organizational alignment - coalitions can achieve high degrees of alignment at the organizational level but fail to foster connections and synergies among their members at the individual level. Networked coalitions therefore ***focus on building and strengthening the relationships between the people*** that belong to them. This is why, for instance, the Industrial Areas Foundation network focuses on the practice of relational meetings: when coalitions are not building trusted 1-1 connections, then those networks are dying.

Networked coalitions can ***operate at a variety of scales*** - but importantly they include the local neighborhood scale. There is a recognition that power comes from the ownership, meaningful activity and participation of people - and that the most accessible space for this is locally. That said, networked coalitions can operate across multiple scales from the local to the global. The most powerful are multi-scaled, capable of simultaneous activity in multiple sites. This is why the Sydney Alliance has both a local structure of districts in neighborhoods alongside a citywide structure. Similarly the Ontario Health Coalition has dozens of local health chapters alongside a provincial structure.

Members of networked coalitions (at both the individual and organizational / group level) have higher degrees of autonomy to implement their own campaign tactics - there does not have to be consensus among all of the coalition's members for one to pursue a particular strategy to advance the coalition's cause. ***Distributed leadership and decision-making*** is thus a key feature of networked coalitions, leading to local actions that are initiated and implemented by members and new grassroots leaders (Check out our guide on distributed organizing.)

However, another crucial feature is that members' self-initiated actions are supported and amplified by the network, allowing them to achieve greater impact than they otherwise could have accomplished. The stronger the network becomes, the more iterations of self-initiated actions appear, and the more powerful these individual actions become as they are supported and amplified by the network. Localised actions are also complemented by larger ***moments of convergence,*** during which all network members coordinate their actions over a set period of time (for example, through distributed events, big days of action or through coordinated tactical campaigning on a single target or to achieve a more tightly focused objective) in order to focus community power and scale impact. In these ways, the coalition ***provides tangible value and concrete services*** to its members.

The Gasfield Free Northern Rivers (GFNR) provides a good illustration of this kind of distributed structure in which members also receive support from across the network. The alliance functions as a system of distributed leadership, comprised of around 20 location-based action groups. While these groups have autonomy, they collaborate by sending a representative to regular GFNR meetings, where a high degree of cooperation ensures that vulnerable districts are supported by the whole region (for more on this listen to ChangeMakers Series 1, Ep 2).

Similarly, Re-Amp focused on designing a network with decentralized structures, many hubs, shared leadership, and multiple platforms for connecting and communicating. But it also holds an annual conference that brings the entire network together to build relationships and develop collective strategy.

By giving their members greater degrees of autonomy and the freedom to self-organise, networked coalitions can liberate the creativity of their members, facilitating a larger diversity of campaigning tactics and actions on the ground. This makes them ideal spaces to ***foster experimentation and innovation***, which, if successful, can then be quickly spread across the network for other members to learn from.

When Networked Coalitions might not work for you.

More traditional coalitions may be more beneficial when the objective is to achieve a very concrete policy or legislative change, which requires a high degree of coordination and harmonization among partners to drive lobbying and awareness-raising activities.

Big-brand NGOs can face difficulties participating in networked coalitions as their desire to promote and maintain control of their brands can find itself at odds with a networked coalition's decentralized and distributed structure, in which no single member has control over all of the tactics and messaging that are utilized across the network. Networked coalitions may therefore not work for organizations that do not like the idea of participating in spaces where fellow members can implement campaigning actions or disseminate messages that they may not fully agree with.

Similarly, networked coalitions' focus on facilitating broad, inclusive alliances can lead to NGOs having to participate in shared spaces with organizations that they may not agree with on other issues.

What Networked Coalitions requires (people, resources, etc.)

Operating Principles

An effective networked coalition functions according to a set of **core operating principles** (adapted from New/Mode's "Embracing Networks" guide):

1. **Dynamic:** Loosely coordinated by a dynamic network of organizations, groups and people but potentially operating with its own shared approach to organizing or social change
2. **Decentralized:** Autonomous engagement is encouraged within the boundaries of a high-level vision or network purpose. Working in such a decentralized leadership structure requires awareness of what helps self-organization, what hinders it, and what enables coherence.

3. **Inclusive:** Anyone can join if they support the campaign's overall vision or purpose. Coalitions thrive when they share a sense of interdependence and a recognition that we need each other. This can emerge out of a crisis (where the resolution is that we need to collaborate) or it can come from the style/practice of the organizational leader (whose own experience means that they know that collaboration is possible).

   For instance, the Sydney Alliance formed following two major social attacks on civil society - one was the Workchoices / Your Rights at Work campaign that saw unions struggle for their lives - and become very open to new ways of collaborating. The second was the Cronulla Riots that saw many migrant communities, especially the Arab community, seek to reach out to others. Those social movements created an environment for leadership engagement that was critically important for building a coalition that was very different to ones that had come before.

4. **Amplifying:** The network exists to support and give power to its members' actions. Members are encouraged to share each other's materials (give recognition) and support each other's campaigning actions. The network's identity is more important than the brand of any single organization.

5. **Respect a diversity of tactics:** Appreciate that network members serve different communities and thus use different engagement techniques and communications styles.

6. **Use care:** Invoking the work of the network and its members is encouraged. Members should, however, use care when speaking on behalf of the network.

7. **Own your voice:** While all members agree to furthering the cause laid out in the network's vision or purpose, individual organisations are not expected to cross-endorse the specific positions of others.

Another set of coalition principles can be found in the Allied Media Projects network principles.

Resources and infrastructure

An effective networked coalition requires putting in place certain **core elements** which form the basis of its infrastructure. NetCentric Campaigns' *Field Guide for Network Managers* list the following seven elements as being critical to a campaigning network's success:

1. **Clear vision**: a clear vision, or purpose, should set out, in broad terms, where the network wants to get to, without laying out all the specifics of how it intends to

get there. The aim of the vision is not to create agreement on all of the member's diverse viewpoints on the issue but rather to clearly state what the network's reason for existence is.

As an example, Re-Amp's vision is: "RE-AMP brings environmental, labour, faith, youth, energy, conservation and other groups together to share one audacious goal: to reduce regional global warming emissions 80 percent (from 2005 levels) by 2050"

The purpose therefore lies at the heart of the network, acting according to a *statement of unity* which brings together its members. Once the vision has been set out, the rest of the elements of the network will flow from it.

2. **Leaders:** Leaders are responsible for driving and coordinating the activities of the network. Leadership in successful networked coalitions is shared and distributed across the network. For example, the Environmental Law Reform Coalition used a steering committee that participated in weekly conference calls to build trust, establish clear leadership roles, and foster accountability.

   There are multiple leadership *roles and responsibilities* required for a network to operate effectively (detailed below).

3. **Common language:** A common language helps members to develop a shared understanding of the cause the network is working to further, helping to build a distinct identity for the network. This can go as far as a shared "organising approach" and training program that comes from this work. For instance, the Sydney Alliance, and the IAF broadly, rely on the principles of community organising to build their coalitions and actively train thousands of leaders in these approaches.

4. **Communications grid:** A communications grid is essential for ensuring free-flowing conversations between members so that they can plan activities, share successes and lessons learned and build relationships with one another.

   For example, Halt the Harm opted for a centralised communications grid through its website, which acts as a central hub for resources, communications and collaboration. Its website provides an array of services, created by members and shared across the network, including: a leader directory, which members can use to connect with others based on shared interests, a needed skill, or geographic location; an alliance map, which features the hundreds of Halt the Harm members and others actively working on oil and gas drilling issues around the country; toolkits and support on campaigning and crowdfunding; a fracking help centre; a litigation map; as well as webinars and podcasts.

   The Environmental Law Reform Coalition opted for a more distributed approach through cloned, individualised microsites that enabled each coalition member to continue managing their communications with their members and supporters. Through easily replicable and customizable content, Capulet, the firm that created the digital marketing campaign, was able to clone 55 sites for 26 different organizations. Capulet created generic landing pages, built a modular infrastructure, and then cloned the pages each coalition member wanted to use. This digital campaign not only addressed anxieties surrounding shared lists and assets, it also allowed each coalition organization to promote a unique URL across all their communication channels via a customizable landing page (read the full article about this digital campaign here: "Give each cook their own kitchen: Beating classic coalition challenges").

5. **Shared resources:** Networked coalitions create impact by pooling their members' skills, expertise, experiences, services and other resources. This allows individuals members to mobilise resources they would have otherwise been unable to access if they were operating alone, whilst also saving the overall network time and money. Networked coalitions therefore need systems in place for identifying the resources, assets and capacities that reside within them, tapping these existing capabilities and filling any gaps that may exist. The most successful 'system' is a highly interdependent set of relational connections that allows organisations to know each other and their assets.

6. **Social ties:** As previously mentioned, networked coalitions focus on building healthy relationships between their members. Such social ties need to be actively cultivated in order to promote trust amongst participants and facilitate collaboration. For example, the communication subcommittee for the Environmental Law Reform Coalition developed social ties as members from the founding organizations worked together to test different frames for the coalition's work. Once they landed on the "Let's get it right" frame they mapped the environmental community to identify potential organizations to expand the coalition.

7. **Feedback mechanisms:** In order to be able to drive a networked coalition forward, leaders need to be able to understand key trends that are manifesting across the network: needs, resources, emerging opportunities and challenges, and so on. Such feedback loops facilitate continuous learning and enable networked coalitions to continuously adapt to the dynamic contexts in which they operate, based on the knowledge they are constantly generating.

In terms of resources, running networked coalitions requires certain **operational costs**:

- **Communications infrastructure** – as mentioned above, an effective network requires putting in place suitable communications tools that allow members to engage with each other and with the network as a whole. The communications infrastructure can also be used to provide new members with the core training they need to be able to effectively participate in the network.

- **Convening costs** – bringing members together in person helps to build social ties, whilst facilitating collaboration, collective learning together and planning for the future. Members can often absorb some, or all, of the costs of bringing people together (travel expenses, meeting space, facilitation, materials, etc.) if they see a clear value from collaboration.
- **Staffing** - as a network grows, staffing is required to coordinate and support the campaigning activities of members. These staff model the new culture that the coalition is seeking to cultivate across the partner organisations. Coalitions are stronger if the staff are organisers, rather than simply logistics people.

Roles

Finally, an effective network coalition requires certain **roles** to be fulfilled by its leaders and members. In smaller or nascent coalitions, a single member can fulfil multiple functions roles but it is still important to keep all of these roles in mind in order to ensure they are all covered by at least one member:

- **Principals (or lead organisers):** these are the coalition's lead organisers who serve as the driving force for shaping the network and provide the initial magnetism that drives people to connect with each other. A key role of principals is to provide the network with a powerful unifying narrative.
- **Drivers (or coordinators):** these are the lead campaigners within the network's member organisations - the people who the network serves and who are responsible for championing individual campaigning actions on the ground to further the network's cause.
- **Supporters (or participants):** represent the larger pool of network members who self-organize to participate in and implement the campaigning actions led by the network drivers, thereby determining if they succeed and setting lessons for future actions. Supporters should also be promoters of the network by sharing their experiences with others outside of the network and bringing in those who show interest in participating.
- **Weavers (or bridge-builders):** are the matchmakers of a network, working to build synergies by connecting members and forging mutually beneficial relationships between them, for example by looping relevant parties into conversations or by brokering introductions between members who are working in similar areas and who could benefit from each other's skills or expertise.

These people actively translate organizational cultures - speaking to (say) both unions and NGOs - allowing different cultural practices to be better understood.

A key role of weavers is also identifying undeveloped areas within the network and working, often with operators, to strengthen them.

- **Operators (or guardians):** are the people responsible for establishing and administering a healthy network infrastructure, in particular the communications grid and feedback mechanisms. Operators focus largely on solving problems for others — identifying where the energy and needs are. They therefore need a “birds-eye” view of the network so that they can see what the whole network (or certain parts of it) needs to function more effectively and use this information to constantly tune-up the network systems accordingly. Operators ensure adequate processes for clear and effective communication amongst coalition members (for example, by setting up a process for coalition members to report on campaign outcomes).

Setup steps/ stages: Networked Coalitions

Connecting to Change the World identifies a flexible “pathway to success” for building any kind of social impact network, known as the Connect-Align-Produce sequence. This is a useful framework for building networked coalitions because each phase builds on and strengthens the connections forged between the members in the previous stage. Having said this, it shouldn’t be seen as a completely linear sequence: for example, whilst some members are moving onto the produce phase, others may only be just beginning to connect to the network.

1. Connect

The first stage involves bringing together key organizations, groups and people with a stake or interest in the cause you want to work on. In this phase, the “weaver” role is key and requires identifying which organizations need to be brought together and what connections need to be forged in order to do so.

Here, when we say “cause” we are both referring to the social cause we are wanting to achieve, and the democratic cause or social capital that we need to build in the process. Thus, the Sydney Alliance campaigns for affordable housing by building local district teams across the city - it has a dual set of goals.

A good way to think about this task is to start from your end point: Imagine you have just achieved a huge campaign win and you want to throw a celebration - who would you be celebrating with? This cues up an image of the people that need to be collaborating in order to achieve the change you seek (even if you’re not 100% clear on exactly what that change will look like yet). This is essentially the vision of what you want your network to look like.

When you're bringing together organizations be sure to apply inclusion, diversity, equity and liberation principles. **Inclusion** means everyone is invited to sit at the table. **Diversity** means that everyone at the table is representative of different experiences, identities, socioeconomic locations etc. **Equity** means that everyone gets food at the table. **Liberation** means that the food they get is according to their needs (halal, kosher, etc.) and they enjoy (according to tastes, likes, etc) Blueprints for Change has a set of IDEL principles that define the IDEL terms as well as a set of values that help guide our work.

Practically speaking this means you will need to build in time, capacity and resources for connecting with groups you might not work with on a regular basis. Working together will mean more than extending an invitation-it will also include building deep trusting relationships through the work over time. When doing this work it can be helpful to take an approach, or stance, that embraces nuance and complexity.

Each coalition will have a unique context, but you might want to consider thinking about race, class, gender, sexuality and more when you build your coalition.

With this vision in mind, you can start comparing it to what the reality looks like today. Are some of these organisations already connected? How can we start to build ties between those that are not? How can we get them to work together? These are the key questions that you should start addressing during the "Connect" phase.

Once you start bringing these groups and organisations together, they can begin to exchange information on what they are already doing and build trust. By sharing such information, participants can start to get an idea of what value a networked coalition could bring to their activities in order to enhance their impact. This will become your network's *value proposition*: the rationale behind why you think organisations or groups would be motivated to join the network and what you think will motivate them to continue participating (i.e. what they would get from the network). To see an example of a concrete value proposition see The Power Shift Network's FAQ for new members, in which they outline the specific benefits and services that members can expect to receive from the network.

2. Align

When a core group of organizations come together with both a stake in the cause and a desire to work together to achieve greater impact, the next stage is *align around a shared vision or purpose*.

However, before moving on to developing a shared vision it may be necessary to spend some time building and aligning around a shared understanding of the situation you want to change. This was a key lesson learned by Re-Amp, which began with a year-long systems mapping process that helped the network to agree upon its collective goal of reducing energy emissions by 80 percent. The shared map also gave members insight into four key levers necessary to shift the system they sought to change.

With a shared understanding of the situation that needs to change, members will be in a good place to set out their vision for the network. This often takes the form of a *unity statement* that specifies either a vision for the future or an overarching principle that members want to stand up for. For example, SaveTheLink.org's unity statement is "Linking is the foundation of the Web. We oppose regulations that aim to censor links to content or otherwise penalize services that utilize hyperlinks."

Keeping your vision / unity statement broad but concise makes it easy for new groups to sign on. It is a good idea to test this out by circulating the statement to other groups and organizations that could potentially be interested in joining and getting their feedback before deciding on a final version.

Once existing participants have aligned around a shared purpose, it can then be used as a tool to reach out to and recruit new members to join the campaign. A basic form (such as this one from Power Shift or this one from SaveTheLink) and an outreach email (like this one) can be useful tools for this. Having groups or organizations sign up to a shared purpose or unity statement in this way establishes a clear *boundary* for the network.

In this stage, it is also important for members to not only align around a shared purpose but also around shared protocols or principles for working together. Developing shared protocols make it clear for members what is expected of them and what benefits they can expect to get in return, laying the ground for the next phase. For example, Power Shift complements its vision with a set of eight principles that its members sign up to and that provide the overarching framework for their collaboration. Lock the Gate Alliance has a similar set of principles, as well as a policy of peaceful behavior, that guide all its work. Similarly, Sydney Alliance's community organizing approach offers a way of working together that guides alignment and is derived from its purpose to rebuild civil society.

3. Produce

Once members have aligned around what they want to achieve and how they envision working together in order to further this cause, the next step is to develop the necessary network infrastructure and resources (see above) in order to facilitate this. During this stage, it is particularly important to think about how to ***facilitate and amplify members' self-initiated actions***; how to ***facilitate free-flowing communications and learning*** amongst members; and what kinds of ***moments of convergence*** you should plan together in order to scale-up your impact.

Re-Amp's strategy for this stage was to establish working groups for each of the key levers of change that they had previously identified in their systems map, as well as an additional working group for funders. At a later point they added caucuses in order to provide outreach to specific constituents, such as youth, faith-based communities, rural areas and national environmental organizations. At the center of their network sits a steering committee, which is responsible for areas such as designing and maintaining the network's infrastructure, identifying gaps in strategy, and distributing learning and information across the network. The steering committee is supported by full-time staff equivalents who work out of the offices of member organizations and provide direct support to members in areas such as media, communications and facilitating connections. See the Monitor Institute's case study on Re-Amp for a more detailed explanation of its operating structure.

As a networked campaign grows, a key lesson learned by the The Gasfield Free Northern Rivers alliance is that it will be necessary to invest increasing amounts into network stewardship. In the case of the GFNR this was fulfilled by a Capacity Building Team which was responsible for providing direct support to members. Re-Amp offers similar services to its members through its Organizing Hub, which seeks to boost campaign excellence by providing members with best-practice guides, skill-building opportunities and hands-on campaign assistance, focused on the core aspects of running strong and effective climate campaigns.

Developing feedback mechanisms through internal and external reporting is another key aspect of this phase and one can easily get overlooked. The ability to share coalition lessons and accomplishments is closely linked to effective reporting practices. The digital marketing firm Capulet managed reporting for The Environmental Law Reform Coalition. Capulet ensured effective internal reporting surrounding campaigning work (e.g., number of letters sent and unique member initiatives) and campaign impact (e.g., what the media and legislators are saying), as well as external communications that amplified the impact of the campaign. Effective reporting practices will look different based on the coalition's resources and needs. The important thing is to establish a realistic process that ensures consistent internal and external reporting. Below, we explain in further detail how to achieve this.

What success looks like for a networked coalition

When building a networked coalition it is important to keep in mind how we might measure its success. *Power in Coalition* (2010) argues that any powerful coalition has two measures for success.

The first is about the social change it achieves. Does the coalition stop the mine or win the public education reform? Any social change goal has two elements to it. One is the win itself, and the second is whether (or to what degree) that win shifted the political climate. In Australia, for instance, the political win on the Carbon Tax in 2014 was good, but brief (it was abolished in 2016). In contrast, a win on stopping the Adani mine may turn around coal mining. Both may be wins, but the political climate question adds greater understanding of their success.

The second is about the social power it builds. Coalitions might win policy reforms, but they also must build the democratic engine room that fuels and sustains that social change. This is what this measure is about. Two elements are particularly important. The first is: how has the coalition improved the quality of the relationships between the member organizations? Is this network of relationships stronger having been in coalition (or conversely are they all sick of each other)? The quality of this network speaks to the capacity of the coalition to act in the future. Secondly, how has the coalition developed leadership? This could be in staff, but ideally is also in volunteer leaders distributed across the network.

Table of Coalition success

Social Change (mobilizing power)		Social Power (organizing power)	
Wins	Shifting the political climate	Stronger relationships between network partners/organizations	More leaders with more skills

Adapted from Power in Coalition (2010), Tattersall.

Tricky parts/ fixes: Networked Coalitions

Avoiding common pitfalls

As a networked coalition grows, it is important to anticipate common pitfalls that can cause a network to become dysfunctional. Below we list four particularly important pitfalls:

1. **Navigation becomes impossible -** This occurs when network leaders or members can no longer fathom the network that they are a part of. They don't know who the members are; where they stand on the issue; what they are doing to further the network's purpose; or how to contact them. Investing in navigation by ensuring the network's communication grid addresses these issues is essential. Members should be able to see who else is a member of the network; where they are located; what campaigning actions they are implementing; and how they can get in touch with them. They should also be able to access resources developed by other members and be able to share their own actions and resources across the network.

2. **Value flows stop -** One of the reasons why networked coalitions are effective at taking campaigns to scale is that they offer concrete benefits to their members. When members implement campaign actions to further the network's cause, these actions are given support and increased visibility by the network, allowing them to achieve greater impact than they would have done if they had been implemented on their own. If these value flows stop, then members will no longer feel as incentivized and motivated to continue actively participating in the network

and it can therefore quickly lose momentum. Investing in a networked coalitions' membership is essential for avoiding this pitfall - members need to be able to reach out to the network and garner support from others when they are leading campaign actions.

3. **Individual actions are not aggregated to create collective impact** - Distributed leadership and decision-making are one of the key characteristics of networked coalitions. But there is a risk that decentralization can go too far, leading to lots of self-initiated actions by individual members that do not add up to broader movement for structural/systemic change beyond the local level, limiting the ability of the network to transform its community power into the political power needed to achieve more systemic changes. Overcoming this challenge required integrating a certain degree of centralization into the network's structure and carefully balancing this with the need for autonomy and distributed ways of working. In the following section, we explore how to achieve this balance in more detail.

4. **Misalignment around why it's important to center race, what it means to center race and how to do it**. This can lead to painful divides related to the ways power and privilege in our coalitions operate at the systemic, institutional and individual levels. These divides are harmful and can stop us from engaging fully to achieve our goals and win. We specifically mention race here because it is a place progressive organizations can often get stuck, and we want to acknowledge that this can apply to other identities and the intersections among them such as class, gender and so much more. As mentioned previously in the guide it's important to center IDEL principles at the values and principles level of the coalition work and to take that into all other aspects of the coalition work. It helps to be explicit about power dynamics, privilege and normalize talking about and unpacking the ways these show up in our work and impact us.

How to achieve scale with networked coalitions

Coalitions always play a difficult dance when it comes to scale - that is - how the coalition traverses large geographies and generates people power across them. Traditional coalitions are often "centralized" with little activity at the base or local level. Yet "localized" coalitions often don't have the political power to move a political agenda at a state or national level.

One way to think about this is to understand that all coalitions negotiate a tension between 'autonomy' and 'control' - and that each has value. Coalitions need an element of control - a (loose) central plan - it is the reason for working together but it is also the way in which coalitions are able to achieve influence over a wide scale. But too much control turns everyday people with autonomy into a group that just receives, and is expected to follow, orders from the top. The extreme of control is 'totalitarianism' - not very desirable.

Conversely autonomy is wonderful, to a point. It's where leaders can come together and make meaningful decisions about social change strategy. But pure autonomy is anarchy - it provides no basis for coordinated action.

Coalitions operate across this continuum - verging between being more coordinated and more autonomous depending on the strategic challenges they face at any given moment. The Sydney Alliance went through a phase of "going deep": focusing on building leadership following its 2000 person founding assembly (they wanted to engage all those people in local groups). But then, in the lead up to the State Election, they shifted and focused on coordination to win specific objectives.

There is no "correct" form of coordination - it is a tension that teams need to negotiate based on their purpose.

Pressures from funders

When a networked coalition starts out, its activities and infrastructure can often be self-funded by its members. However, as the network grows in membership, scale and complexity it will most likely be necessary to secure its own sources of funding. This can be achieved by securing external funding through grants exclusively for the network.

However, funders often exert pressures on their grantees for increased centralization, control and bureaucratization, under the pretext of ensuring that their funding is managed in an efficient and accountable manner. This can be problematic for networked coalitions, as their strength and effectiveness lies in their loose, decentralized structure in which no single person or organization has control over the entire network's operations. It can also create power imbalances that often go unaddressed directly with the funders, which can lead to fractures, unhelpful communication backchannels that only part of the coalition is part of and unnecessary tensions between groups who are perceived to have more or less funding and therefore more or less power in a coalition.

Re-Amp's strategy for addressing this tension was to involve both funders and NGOs as equals from the outset of the establishment of the network. They both worked together to agree on collective priorities and then they aligned their campaigning strategies and funding accordingly. This created an opportunity for funders and NGOs to engage as equals in setting shared strategies, even if their roles differed.

Additionally, there is a growing recognition in the funders' community of the potential of networked approaches to campaigns and of their need for different funding mechanisms that are more suited to their distinct characteristics. There are several guides that have been published for funders on how they can more effectively support networks, including Engage: How Funders Can Leverage Networks for Social Impact and Catalysing Networks for Social Change (Connecting to Change the World also has a chapter on funders' roles in networks) so we encourage help to get these widely disseminated!

Data management and privacy

Rich and open flows of data and information are essential for a networked coalition to operate well. Due to their large number of members and campaigning actions being implemented on the ground, networked coalitions generate a lot of information that needs to be managed effectively and responsibly. Doing so requires establishing clear protocols that set out what information will be gathered from members, how it will be gathered and with whom it will be shared. Specific tools can then be developed in order to manage data collection and dissemination according to these protocols.

An important first step towards developing specific protocols and tools for data collection and sharing is setting out an initial **privacy policy** for the network, which will provide boundaries and inform subsequent protocols. For example, the Halt the Harm Network's privacy policy clearly states what information will be used, what it will be used for, and with whom it will be shared. See Annex 2 of a Field Guide for Network Managers for the full text which you can use as an inspiration when developing your own policy.

Another important step is to have intentional conversations about security, risk, vulnerability and threat modeling with coalition partners. Have these conversations within the political context you're operating in and bring in experts when needed. Keep in mind that this is another place where power and privilege play out in our work. People of color, women, queer and trans folks are much more likely to face vitriolic online attacks. Campaigns combating white supremacy will likely attract trolls, harassers and worse. Loose data, privacy and security practices in a coalition can lead to real harm for coalition partners and their members.

Principles to begin thinking about and guiding our digital security in coalitions include communication, storage, access and controls.

Please review the Blueprints for Change Digital Security Basics for Campaigners guide for more in-depth information.

Further resources: Networked Coalitions

Guides:

- A Field Guide for Network Managers (NetCentric Campaigns)

- Embracing Networks (New/Mode)
- Unlocking Networks: A Hub for Community Organisers and Peer Networks
- Network Weaver Resource Package & Toolkit
- EEFA Coalition Cookbook
- Net Gains: A Handbook for Network Builders Seeking Social Change

Books:

- Connecting to Change the World: Harnessing the Power of Networks for Social Impact (Peter Plastrik, Madeleine Taylor & John Clevela)
- Power in Coalition: Strategies for Strong Unions and Social Change (Amanda Tattersall)
- Network Weaver Handbook (June Holley)

Articles & Case Studies:

- Give each cook their own kitchen: Beating classic coalition campaign challenges (MobLab)
- Transformer: How to build a network to change a system: A Case Study of the RE-AMP Energy Network (Monitor Institute)
- Changemakers: How to Win (Season 1, Episode 2): Case studies of the Brexit Campaigns and the Gasfield Free Northern Rivers alliance
- Pioneers In Justice: Building Networks and Movements for Social Change

Attribution: Networked Coalitions

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DISTRIBUTED ORGANIZING

Summary: Distributed Organizing

Distributed organizing activates a network of self-starting supporters/campaigners in multiple locations, which can spread across geographical boundaries, interests and cultural groups. It draws on the initiative and energy of volunteer organizers to start groups and lead teams with varying degrees of autonomy.

In comparison, traditional NGO-led campaigning and party-led political organizing tends to rely on more command-and-control leadership and paid staff and organizers to mobilize others to take action and raise awareness.

Though more horizontal when compared to traditional command and control leadership, distributed organizing often relies on a central coordination group to launch the network and to drive it towards common goals and milestones. When done properly, it can help a movement or campaign scale rapidly and channel huge amounts of collective power.

And you might also be familiar with recent Climate Strikes, Black Lives Matter, Women's Marches, and Hong Kong #AntiELAB protest organizing. We think of these as falling more into the decentralized organizing category. Typically decentralized organizing doesn't have a central body planning strategy. They're usually self arising and trickier to plan ahead of time. Decentralized organizing is often sparked by a crisis or sense of urgency.

Who’s doing distributed organizing well?

Climate campaigners 350.org and the Sunrise Movement, Hollaback! - a global, people-powered movement to end harassment in all its forms, the Bernie Sanders 2016 and 2020 presidential campaigns, undocumented immigrant rights campaigners Movimiento Cosecha, Support. Don’t Punish - IDPC campaign for more humane drug policies, Indivisible chapters organizing U.S. citizens to oppose the Trump agenda, the Australian Stop Adani campaign (blocking a massive coal project). And many more….

Why do we need to do distributed organizing well?

Tapping into the collective power of your supporters

The main benefit of distributed organizing is that it unlocks significant amounts of people power. This is due to the fact that people want to participate and engage more actively in shaping the course of the campaign or cause that they are supporting when they have a say in strategy and execution. As technology enables people to engage in targeted activism previously only possible by NGOs and political parties, a wider group of peopleare now more self-sufficient and digitally savvy, which enables them to take on more important roles and responsibilities.

When these currents are tapped, great things happen! To quote Becky Bond and Zack Exley, commenting on the explosion of supporter power during the 2016 Bernie campaign: “As it turned out, people were just waiting to be asked to do something big to win something big.”

A more empowered base

In most distributed organizing models, supporters have a lot more say and freedom over the direction, branding and culture of their local group/chapter and ideally, the power to shape the overall campaign and how it is managed. Even giving a relatively small amount of local control and autonomy can go a long way. Tweaking logos, slogans and local action ideas may not seem like much but it engages supporters more deeply and builds a feeling of deeper involvement and empowerment. People come to see themselves reflected in the movement. The customizable hubs model behind the People’s Climate March is a good example of this.

Distributed organizing empowers people on the frontlines of social change to act as co-strategists in a campaign. Durable social change comes from ensuring that those who are deeply affected by capitalism, colonialism, patriarchy, and white supremacy (to name a few) are the ones engineering solutions.

Building local power

Another advantage to distributed organizing is that it can give your campaign the kind of local expertise and competence that a really centralized operation can't. A local group might be able to create deep partnerships with community organizations that are well-known. They might be able to determine what kinds of tactics are most efficient in their own community or which individuals are influential and important to engage. They are often able to tap into local community narratives that compellingly convey the importance of the work.

When people in their own backyards are paying attention to what one another has to say on social and political issues, that's an important first step in contributing to a national conversation and turning the tide on larger legislative battles.

Rapid growth of supporter base and geographic coverage of campaign

From a campaign growth point of view, distributed organizing allows a supporter base to grow much more rapidly than traditional top-down chapter implantations because activation of distributed groups draws on existing local resources, not delegated and managed by HQ, so setup can happen quickly and independently.

From an efficiency standpoint, distributed organizing allows a campaign's supporter base to scale with a relatively small central staff count. As a proof point, consider that 350.org has activated over 4000 global groups with less than 100 paid staff managing the network.

Multiple points of entry for supporters

When distributed organizing is done at a larger scale, it can offer a variety of low-threshold actions that supporters can take on and manage. This allows campaigns to engage the energy of people with a range of capacities and skill sets. For example, some of your supporters may be comfortable coming out to a rally but others would not. Giving them the option to run a texting campaign from home, for example, makes use of their abilities while respecting comfort zones. Nicole Fairall from ACLU's People Power Program remarks that campaigns that make these options available benefit by activating a supporter base from a diversity of age groups and levels of physical ability.

Winning campaigns

This, of course, is a big motivator for campaign designers and distributed organizing has proven its power to build towards solid campaign wins in the field. One clear example here is how 350.org used distributed organizing to build up a global network of campus and local groups pushing their institutions to divest from fossil fuel investments. To date, they have pushed an impressive list of targets to commit to divestment. Given 350's initial staff size and resources, it would have been virtually impossible for them to scale up the the way they did so quickly through fundraising, global staff hires and management of all of the above. As 350 ramped up through distributed organizing, larger green groups who had been running top down, like Greenpeace, took notice and started rethinking their own organizing practices.

Because distributed organizing builds power at the local level, It also means that you can get really local wins on the board to create a better foundation for a national or international organization to build upon the in the future, if groups are autonomous enough to work on what's interesting to them personally, alongside what's interesting to the national organization. For example, some Indivisible groups have canvassed for really small local campaigns, managing to flip congressional districts. This creates a better landscape for big groups to work with when it's time for a national general election.

When distributed organizing might not work for you

Make no mistake, distributed organizing requires a serious amount of planning, time and supervision to run properly. Most organizations are more set up to mobilize (message their lists with light calls to action) rather than organize (work with teams of supporters and skill them up) so distributed organizing requires a commitment to build a support structure and to try out some new approaches. If this is already an impossibly hard sell, then it's a good time to reconsider.

The first major barrier to deploying a distributed organizing approach would be the internal culture of the organizing group. If your organization has a lot of trouble letting go of messaging and branding (not to mention some strategy and agenda-setting) and tends to micromanage supporters and their actions, then this way of organizing and mobilizing people will lead to a lot of headaches.

It also requires a truly genuine belief in empowering others and a great deal of trust and respect. It works best when the centralized team treats their distributed networks as real peers, with a vested interest in social change, rather than an obedient army of volunteers to command.

There are also some campaigns with conditions where distributed organizing will work better than in others. The best conditions for a distributed organizing approach are when the campaign issue has momentum and is already a shared and urgent concern for many people, when people power is an important lever for making change happen and where the campaign outcome is relatively straightforward (win an election, stop a project, flip a position on a policy etc.).

Distributed organizing is harder to run with when campaign goals are complex, not necessarily helped by grassroots pressure and when issues behind the campaign are less visible and understood by the average person.

What distributed organizing requires

Internal alignment

Since distributed organizing requires a good amount of energy and involves the tensions of trying on new campaigning practices (at first), alignment throughout the campaigning group and if possible with top decision-makers is important.

It's worth taking the time to explain the benefits of going distributed to the uninitiated, as the growing pains of trying new stuff will inevitably come up and may lead to innovation-killing backlash if leadership has not bought into this.

Letting go of total top-down control

One of the toughest things about running a distributed network is letting go. If you are used to top-down management and controlling your organizational brand tightly, this will require some internal work on letting go and trusting the network.

Some triggering questions to ask yourself and your group would include:

- Are you ok with empowering your supporter-leaders to talk to the press and tell their stories or are you requiring all comms get approval through central staff?
- Are you ok with letting local leaders plan and run events without going through and approving every detail of their planned actions?
- Are you ok with letting local leaders adapt your logo and brand and colors to suit local culture and preferences?
- Are you ok with local leaders planning a local campaign, alongside or instead of working on the national organization's priorities?

If the answer to one or more of the above is no, then think twice before going distributed as it will turn out to be a nightmare to manage.

On the other more positive side of things, letting supporters build something new on their own initiative is also one of the most beautiful things about distributed organizing. Who doesn't love the feel of watching someone in their organizing network shine and succeed from their own hard fought efforts?

Accept a certain level of messiness when volunteer self-starting leaders take charge of actions. Not everyone will be on time and 100% on message but the scale and impact will be so much greater.

Exaggerated concerns about rogue chapters often come up here. See below.

Basic digital infrastructure

- Online resources made available to supporters (See toolkits below). Google docs is a good way to start this on the cheap
- Communications systems including e-mailers like Mailchimp, a web conferencing system like Zoom or Jitsi, a public-facing interactive platform where members of your base can post their accounts (This can be a simple blog platform)
- Team chat software such as Slack (to help local supporters stay in touch and share tips) - but if your base aren't confident with trying new platforms or already

using this, you may be better off organising where they are, for example through Facebook groups or even direct messaging via Facebook or Twitter

Self-starter types among your base

The extent to which you will find motivated and disciplined people driven by your cause will largely depend on the cause you are campaigning on.

A distributed movement runs on the energy and initiative of its self-starting leaders. Their motivation is half the battle and their digital communications savvy and self-management capacity is the other. If you can't find autonomous "do it yourself" supporters willing to get things started, you can't go very far with the distributed model.

Time and spaces for real or virtual check-ins and team convenings

A distributed network of supporters and local leaders is a living community that needs to be maintained and nourished over time or relationships, group cohesion and morale will suffer. Those with experience managing these networks stress the important of time spent on relationship-building activities that help self-starters achieve their goals. At the very least, central organizers need to have time to chat with distributed network leaders and to field questions, troubleshoot and give group pep talks to keep the whole thing moving forward.

If distances are too vast and resources too thin, make sure that time is left for larger online group check-ins with the network so that the scattered leaders of the campaign feel like they are part of a larger whole from time to time.

Kunoor Ojha has this to share on Indivisible's video conferencing practices:

Video conferences are my fave ever. It's great to see facial expressions in real time, as well as people's living rooms, offices, and pets. There's also always a party in the chat box :) creating space for joy is so important, so i'm always clowning around misbehaving on these.

If regular physical gatherings every few months or once a year are possible, make sure that room and resources for this is baked into the plan.

Regular organized trainings are also a good way to bring people together while building supporter capacity at the same time.

Setup + stages for distributed organizing campaigns

Establish a "mobilizing frame"

Behind all successful distributed campaigns is an issue that naturally resonated with its supporter base.

Campaign planners who want to go distributed should think about how their issue does (or doesn't yet) plug into people's first order concerns (ex. fear for safety of self and loved ones) or passions (ex. fighting injustice, hope for a better future) and pain points (ex. A political villain making life hell for everyone).

Marisa Franco, B Loewe and Tania Unzueta frame the above as having "Action-worthy problems and solutions". The questions they ask are: "Does the problem you are trying to solve really matter to anyone? Is the solution you propose realistic and effective?".

**Suggestion: Test this quickly on your network...

Take your current cause framing and call out to a segment of your supporter base asking for a show of hands on who wants to organize locally on this. This will help gauge the level of spontaneous energy for your issue as currently presented. If the energy is not there, you may need to work closely with your base to find an angle that will get them motivated for self-starting actions.

Here is an example of how the No Red Button Campaign (now Beyond the Bomb) tested the enthusiasm of their supporters for various distributed actions. Link to screencap of their google form questionnaire.

Create a distributed action plan

This is kind of like reverse-engineering if considered from the traditional practice of thinking up what you want your campaign to achieve and then calling out to your base as cheerleaders and amplifiers of your messages and actions.

In distributed organizing, campaign design starts with the question: "What would our base be motivated to do to build the campaign with us and how can we design a campaign to include them and give them key roles in this?"

Think of the campaign as an engagement journey, where group participation is just as important as the milestone folks are mobilizing towards. In the Bernie campaign, this path started with volunteers raising their hands to help out with local organizing and then, through a series of planned interactions with other organizers, brought the willing to become local trainers and managers of new recruits over time.

Once you have defined a broad participatory path for your supporters, define the range of actions that local leaders can take on organizing themselves.

Think through the process that a local leader will go through from stepping into their role, to organizing and executing the actions. Consider whether it is a reasonable ask. Experienced distributed organizers usually try going through the actions themselves to understand what resources and time are required.

Don't be too pessimistic on people's willingness to take stuff on, though. Nicole Fairall from ACLU's People Power Program notes that a surprising amount of people on their list were up for organizing a local event, when asked to do so via text. If folks are in charge of running their own actions, a good number of natural leaders seem to come out of the woodwork.

>>Here is a sample distributed action plan created for a group working on voter registration.

**Suggestion: Keep the participatory plan simple

If this is your first time rolling out a distributed network, limit the range of self-starting actions asked of supporters in your first wave of distributed actions. This will allow you to better support and manage the network and fine tune the process for the next round. (See scope blowup in the Tricky parts and fixes section below).

Define your mission, values and what is left open

Distributing leadership means that your campaign will be shaped and spoken for by people who may not have gone through the thorough org culture intake process that core campaign staff typically experience. To keep everyone aligned, it is important to put the spirit of the campaign approach on paper in some way so that remote supporters have something to buy into.

To help with this, define, through a charter, or public mission document, what the values of your overall movement and its local groups are. A quick list of "do's and don'ts" is always good here.

This is a good opportunity to name your values around inclusion, diversity, equity and liberation (IDEL). These values should guide future decision making around many parts of your project including goal setting, creating tactical plans, volunteer training, expectations around how people in your project engage with each other, who you do and do not work with, and so much more. It's important to address these topics early and often in your work. Not doing so can cause problems and makes it hard to backtrack and try to add this in once your project is already running.

>>Here are a few samples:

- Blueprints for Change has a set of IDEL principles that define the IDEL terms as well as a set of values that help guide our work.
- The Engine Room describes how they made space to name their values
- FRIDA: The Young Feminist Fund built a Happiness Manifestx to guide themselves and their local feminist partners around the global south
- 18MillionRising.org has a set of public operating principles.
- Movimiento Cosecha has a set of principles they use as tools to protect the movement from problems that might arise.
- The Sierra Club adopted the Jemez Principles to guide their work.
- CompassPoint has a public vision and values statements.

Also, consider a “roles and responsibilities” doc that establishes expectations and a code of conduct/ community agreement for local leaders.

Jolt has a great chapter guide that outlines the roles of local leaders and includes a code of conduct. Link to their guide here.

Fight for the Future has a community code of conduct for their online and in person spaces. This is particularly useful for Slack and other digital messaging platforms.

In your documents, leave space to define what is left open and free for local leaders to decide and create and what is left up to central coordinators to decide. (For more on this, see Balancing local autonomy and central control in the Tricky parts and fixes section below).

Plan for the recruitment and activation of local leaders

Consider that recruitment of local leaders may be a job in itself.

To kick off the recruitment process, most orgs start with lists of “high action takers” that have been gathered through previous actions. These are supporters who have shown interest in doing more to help the campaign and are natural first contacts to reach with an appeal for local leadership. You might consider surveying your base to see who might be interested in leading and taking on additional responsibility.

If you need to widen the net, consider public events or convenings that would bring out some fresh faces and opportunities for direct recruitment.

During the Bernie Sanders primary campaign, organizers Zack Exley and Becky Bond set up a series of "Barnstorm" events, essentially pep rallies that brought together supporters and quickly transitioned from speeches to outlines of supporter actions needed to help the campaign and direct recruitment of interested people present through paper signup sheets later uploaded as images to a central database. In this way, the campaign regularly inducted thousands of volunteers across the country.

Before you bring hundreds or thousands of new eager supporters onboard, make sure you have thought through what the activation process will be. Think through the path a new supporter needs to take from first contact through to first actions and responsibilities and consider how you and your central staff will support this and communicate with them.

An activation process should include starter tools for new leaders but you should plan to have some central staff on hand to support induction and setup of local leaders.

If you have the time and resources, activating and setting up new leaders is always best done face to face in small gatherings. Experienced distributed organizers like 350.org in Europe, for example, went beyond digital calls out and toolkits when forming new chapters. Instead, staff travelled to meet groups with mutual interest and invested time in coaching new leaders.

If you are starting up a larger distributed system where face to face meetings with all supporters may not be feasible, do you have a step-by-step set of instructions for would-be local leaders who want to get active starting a local group or planning a local action? Getting this down will save countless hours of back and forth coordination.

The more tools that you can set up for self-starters to get going on their own, the better. However, a totally hands-off approach does not work great. See further below on Hollaback's experience with digital toolkit only and resulting drop-off.

Create a management plan / structure for the distributed network

Activating local groups is an important first step but if you want your distributed supporters to move together with you to achieve campaign objectives, a group management plan is essential.

The following are considerations for creating a management plan:

- How will you keep distributed teams on track?
- Do you have staff time allocated to managing the network?
- Do you have communications capacity to reach out to remote leaders regularly?
- Do you have a yearly timeline of actions and collective prep sessions leading to actions?

- How will you build listening and learning into your plan to ensure true leadership of your network?

Are you planning ahead for certain milestones, where you will be driving everyone towards simultaneous actions? Typically, these ‘days of action’ bring the network together and focus collective power on targets in a visible way, especially if collective actions are documented and communicated.

Regular check-ins with remote chapters are important to maintain momentum. Aside from calls to action or group action reports, these can be crowdsourcing sessions where you are asking local leaders for input on future strategy.

Finally, keep in mind Zack Exley’s advice on “the tyranny of the annoying”, or the certain types of supporters who will join and begin to dominate the group and bring it down with their own bad energy. This requires readiness from central organizers to diplomatically relieve folks of their leadership functions if things start to go sideways. It’s hard to plan for this, as each case that comes up is nuanced, but central staff should be made aware that excusing volunteers from their duties is sometimes an option.

Mirror-back collective actions and maintaining group morale

Most distributed networks naturally want to show off the diversity of the movement they have brought to life, and its spread across geographic areas. Aside from legitimate boasting, this does a lot to maintain group morale and is a validating moment for local organizers when they see themselves as part of a larger whole.

A classic way of doing this is to generate country-wide or global digital maps of distributed actions/groups with pins representing each instance of a local action.

Some groups also put together visual mosaics of locally-produced campaign content, which can include images, videos or written testimonies.

Encouraging everyone to drop a common hashtag into their online posts is a good way to facilitate curation of supporter-generated content. There are even some affordable online apps that bring together all posts in a visually pleasing way, like https://walls.io/

Testimonies from local supporters are especially important here as they let all distributed network members know that the campaign/movement is made up of people just like them and that individual efforts count for a lot.

To bring all of this together, consider assigning the curation role to a bottom-liner on your team as this task needs regular focus. For more pointed advice on sourcing and managing supporter content, see our **Crowdsourcing how-to here**.

Note that this is both a morale-building exercise but also a collective show of force if you are trying to move the needle on a big issue and putting pressure on corporate or political targets.

Measuring success

Performance metrics and methods for evaluating how successful a distributed organizing system is have not been created and spread in any definitive way.

One place to start evaluating success and demonstrating it to team members, boards, funders etc. is to look at the ratio of paid staff employed to manage the distributed process vs. the amount of total actions completed, chapters created, supporters engaged etc… This kind of calculation would show clear advantages of distributed approach over a traditional top-down and staff-intensive system from a resource-management + efficiency perspective. To put it another way, think of the same amount of actions generated in a distributed organizing structure if paid staff was required to manage it at all levels. Compile the time and salaries of all staff in a traditional system vs. the costs of staff managing distributed leadership and the savings should speak for itself.

Team Internet leaders attempted to measure success and account for results using some of the following metrics. These are by no means complete but may be useful for others who are trying to evaluate distributed organizing projects.

Tangible items to consider reporting on:

- # of volunteers trained
- # of volunteer leaders developed
- # of volunteers who can clearly articulate a race analysis on the issue
- # of volunteer generated campaign emails, calls and P2P texts delivered
- Passing X legislation by Y time
- # of legislators influenced/on our side

Less tangible things to capture and tell the story of:

- Impact on the media narrative around your issue/campaign
- Changing the political discourse on the issue/campaign
- Changing what's politically possible on the issue and creating new political openings
- Laying the groundwork for future victories
- Increasing volunteer capacity
- Developing volunteer leadership

The 2011 report Transactions, Transformations, Translations: Metrics That Matter for Building, Scaling and Funding Social Movements by Manuel Pastor, Jennifer Ito and Rachel Rosner contains sample metrics that may be helpful as you think about defining metrics for success in your own work. Beyond Vanity Metrics from the MobLab is another resource to ensure that what you're measuring is indicative of true engagement.

The tricky parts of distributed organizing and some fixes

Accountability

Too often distributed campaigns operate in an accountability-free zone. The desire to build and scale quickly is not balanced by thinking about the disparate impacts and unintended consequences of campaign actions, and ensuring that organizers and volunteers on campaigns are treated well and provided with space to address when violence or wrongdoing is perpetuated internally or externally.

When working with people, you need to constantly be thinking about what you owe them and what upi get from them, and how to ensure you're being accountable to them. Similarly, building in accountability mechanisms (i.e. various forms of reporting). There are a number of tools and frameworks you can use to embed a culture of accountability and frameworks to address violence. INCITE, a network of radical feminists of color organizing to end state violence and violence in homes and communities developed a community-based strategy document to respond to violence. The Creative Interventions Toolkit is another great resource from the same movement. The People-Powered Accountability project, initiated and facilitated by Accountable Now, aims to identify and mainstream accountability practices that help CSOs seize the digital opportunity of people-powered work approaches.

Not enough oversight and support, chapters dying out

While it is tempting to focus all energies on a digital toolkits to equip self-starting leaders, real-life experience has taught distributed organizers that this is not enough.

Hollaback! for example started out by incubating chapters around the world with a good idea, a call to action and a "self-serve" digital toolkit for new chapter leaders. What they found, however, is that leaving groups entirely on their own with just these resources did not sustain the network and led to a good number of chapters shutting down.

To correct for this, Hollaback's leadership set up a mandatory webinar series for new would-be leaders that gives them more extensive training before they get started. This commitment also weeds out self-starters with a weaker commitment that may not be able to follow-through with their responsibilities.

Think of how you plan to support your larger network through regular contact and capacity building. At its simplest form, as practiced by 350, this takes the form of regular web-conferences where local leaders share experiences with central staff and collectively give each other pep talks.

Scope blowup: Too many different actions being sparked

Some distributed campaigns become too successful for their own good when they leave the creative scope entirely open for remote leaders. This happens when a central staff group commits to supporting any action that gets sparked remotely. If local leaders come up with hundreds of different action plans with hundreds of separate support needs, this can become overwhelming for central coordinators.

Common practice is to start a distributed campaign by driving all leaders to perform one or two starter actions collectively or to focus a variety of actions on a single “day of action”. This cuts down management and coordination noise and makes the network manageable until greater capacity is built in.

Another way to manage this, courtesy of Nicole at the ACLU, is to divide distributed actions into tiers of priority for ex.

Tier 1 - Urgent, do ASAP
Tier 2 - Action-oriented events related to our main campaigns
And then... other actions can still be proposed on a menu of possibilities but are presented as lower priority.

Balance between local autonomy and central control

A classic question in distributed organizing is deciding how much freedom to give local organizers vs. central control.

Most successful distributed organizing campaigns are not free-for-alls but rather, they run on a hybrid of grassroots creative freedom and control (in some areas) and top-down leadership, ie. some things are decided by a central command group.

Below, for example, is how 350.org and Hollaback! have managed this divide. Your group may choose to divide power and responsibilities differently, of course, but keep in mind that a healthy balance of local freedom and central control is what energizes the network.

Excerpt - *Balancing autonomy the 350 and Hollaback! way*

Strategy, training and facilitation are all managed top-down by central staff	Local groups have tactical and creative freedom in the following areas
• Framing the “action-worthy” cause and the approach to it • Creating overall campaign strategy • Planning collective actions that mobilize local groups • Creating central communications for collective mobilization • Creating a digital hub structure and digital action kits for local organizers • Continually building capacity with local organizers • Curating and mirroring local content back to the collective	• Local groups can self-activate • Local group chapter leaders appoint themselves • Local digital hubs can be customized to reflect local flavor • Local groups are free to create their own messaging • Local groups can devise and execute their own actions

Suggestion: Clearly map out roles and keep this reference handy when briefing new self-starting organizers or central staff.

Rogue chapters….

This is mentioned here because people bring it up a lot when distributed organizing is proposed as a course of action. In fact, it is the biggest fear that holds back more organizations from going distributed. Put simply, this is the fear that opening up leadership of local groups to people who are not vetted org staff will result in numerous groups going sideways and doing things that discredit the whole network.

Actually, it is something of a non issue. The groups that have run networks with hundreds of chapters report that, once in awhile, one of those chapters will say or do something that departs from the spirit of the campaign. So anecdotally, the rate of something going mildly sideways is less than 1 percent. At this level, such cases were easily dealt with by organizers who contacted the local leader and worked things out quickly and directly.

To make sure you lower the (already small) chances of something disruptive happening in a distributed chapter, establish clear public codes of conduct for local chapters and a campaign or movement values statement. Ask all self-starting leaders to opt into these and to share them with new local supporters.

Further resources for distributed organizing

For a deeper dive into the nuts and bolts of distributed organizing, we recommend the following:

Articles:

- How we make change is changing: Open source campaigns for the 21st century
- The social strategy that is super-sizing the climate movement - Mashable
- 350 and Hollaback! build distributed campaigning power
- A critique of distributed team support after the People's Climate March
- The six building blocks of distributed organizing campaigns

Webinars:

- Building Effective Movements for Change Through Distributed Organising, MobLab Live webinar
- Team Internet: What We Learned Organizing to Save Net Neutrality, PowerLabs webinar

Books:

- Emergent Strategy
- Engagement Organizing
- Hegemony How To: A Roadmap for Radicals
- How Organizations Develop Activists: Civic Associations and Leadership in the 21st Century
- Rules for Revolutionaries
- Shut It Down
- Small Groups With Purpose
- The Starfish and the Spider: The Unstoppable Power of Leaderless Organizations
- This is an Uprising

Sample distributed toolkits:

- Hollaback! How-to guides
- 350.org organizer toolkits and trainings
- Team Internet host guide

Who can help with Distributed Organizing?

Providers, consultants, trainers….

- PowerLabs (consultants, trainers)
- NetChange Consulting (consultants, trainers)

Attribution

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PERSUASIVE CONVERSATION CAMPAIGNS

Summary: Persuasive Conversation Campaigns

Persuasive conversations, also known as values-based conversations, are exchanges between advocates and their peers or members of the public that surface personal attitudes and perceptions around social issues to shift existing positions or at least open people to a new perspective. These conversations are typically held around polarizing issues — think marriage equality in the United States circa 2008-2015 or Australia more recently — where wider shifts in attitude could result in beneficial policy changes.

When organized at scale, persuasive conversation campaigns, also known as “deep canvassing,” deliberately catalyze as many conversations as possible to achieve impact at a level that could influence voting. Such campaigns call on large numbers of supporters to carry out conversations either with their own peer contacts or pre-selected sections of the general public. This is carried out either through door-to-door canvassing or through organized phone or digital communications drives.

Who’s doing persuasive conversation campaigning?

Persuasive conversation campaigns were deployed extensively throughout the U.S. buildup to national acceptance of marriage equality (gay marriage) in 2015 notably by groups such as Freedom to Marry. A similar approach was then deployed across Australia during their successful marriage equality campaign in 2017. In Ireland, Uplift and other groups mobilized persuasive conversations in 2018 towards their successful repeal of the 8th Amendment, which had restricted access to abortions in the country.

Why should you consider persuasive conversation campaigning?

Persuasive conversation campaigns can help break through to segments of the population who have a different perspective or have voted against you. This is especially important when campaigning on polarizing issues.

A study of the effect persuasive conversations have on negative attitudes towards transgender people found that one in 10 people could be made to completely change their view through this process.

In Ireland, where persuasive conversation campaigns aimed to rescind abortion-restricting legislation, thousands of peer-to-peer exchanges were catalyzed and 39% of people polled about what changed their minds to Yes cited a conversation with family or friends.

Why do persuasive conversations work?

Persuasive conversations use four techniques which help in convincing voters to change their minds. The techniques are explained below:

1. **Self-persuasion**

   In simple terms, voters take an active role in persuading themselves to change their attitudes or thoughts on a particular issue. The canvasser plays no role in persuasion, rather they place voters in situations where they persuade themselves to change. This motivation comes from within, canvassers don't have to put in the extra effort to change minds.

2. **Active Processing**

   Active Processing facilitates experiences through role-playing, simulations, and scenarios. Here, people apply what they already know. So, when the voter is presented with the canvasser's experience or thoughts on a particular topic, the voter tries to generate, re-organize, and self-explain the topic. This way, it makes the voter think and talk about their own experience.

3. **Perspective-Taking**

   Perspective-Taking considers or understands an issue from an alternative point of view. When canvassers share their perspective, it makes voters ponder and consider the alternative. Sharing their own experience adds value as they see the same old issue in a new light.

4. **Cognitive Dissonance**

   Cognitive Dissonance is the tension that comes from holding two conflicting thoughts in your mind at the same time. This is when your actions don't match with your belief. The act of deep canvassing helps people realize that their beliefs and actions don't go hand-in-hand, compelling them to change (voters decide on their own).

When persuasive conversation campaigning might *not* work for you

Persuasive conversation campaigns require a lot of time, training, and volunteer effort. If you have any of the following limitations, this may not be the right strategy for your needs:

- **Lack of Training**
  Persuasive conversation campaigns require well-trained volunteers that have the expertise, communications skills, and experience to effectively execute the campaign. This work can be challenging and well-meaning volunteers can hurt the cause if they are not properly trained or easily triggered by these often difficult conversations.
- **Short Timeline**
  This method will not work during Get Out The Vote drives or other urgent action campaigns with a compressed timeline, due to time constraints
- **Limited Volunteers**
  Persuasion conversations take time and for these campaigns to work they need to cover large areas and reach considerable segments of the population, which means that you need many volunteers to succeed.

What good persuasive conversation campaigning requires (people, resources, etc.)

Volunteers with active listening skills

Active listening is a skill that all volunteers doing persuasive conversations must possess. Volunteers must approach people with compassion while listening and take care to express their empathy, offer validation when appropriate, and to always be honest and forthright. This can test any volunteer's patience as they are inherently addressing disagreement and ignorance regarding an issue that they care deeply about. Leaving space for another person's transformation is a skill that usually takes time to develop.

Big lists and many, many volunteers

A whole lot of donated supporter hours are needed to cover enough ground to influence attitudes across a segment of the population, either through door-knocking or virtual conversations. This means that you will need to activate a lot of supporters to pull this off.

As a benchmark, some estimates of door-to-door requirements suggest that volunteers working a 2-hour shift can, on average, complete 5 conversations.

To recruit the large number of supporters required for persuasive conversation campaigns, groups considering such an approach will need large lists to call upon.

Time

According to Dave Fleischer, who pioneered this approach, it takes about six months for a campaign to get a hang of the method and to recruit and train volunteers.

In terms of time, the program will gain momentum over a long period meaning that you need to start at the **early stages of campaigning.** But the impact of **persuasive conversation campaigns lasts for about 9 months**, unlike traditional vote-based canvassing, where effects of persuasion are short lived.

Setup steps/ stages

1, Staging campaigns so that they have enough time to run

It is recommended that you start your persuasive conversation campaign 10 months before elections/crucial decision moments and start **training volunteers a couple of months ahead of** campaign deployment.

2. Call-out to start recruiting volunteers

The first active stage of persuasive conversation campaigns involves recruiting from your big lists. This requires prior setup of a sign-on site/process, as well as an induction/orientation process with people who support this if response volumes get high.

3. Set up ground rules and guides for conversations

Since the issue areas persuasive conversation campaigns deal with are sensitive, it's important to set up clear ground rules and principles of engagement for your supporter teams.

Uplift Ireland, when supporting conversation drives to fight for pro-choice legislation in Ireland, set up the following ground rules:

These are the ground rules for any productive conversation:

Be curious and open to learning: Conversation is as much about listening as it is about talking. Listen and be open to hearing all points of view.

Show respect and suspend judgement: Setting judgments aside opens you up to learning from others and makes them feel respected and appreciated.

Find common ground and appreciate differences: Look for common ground you can agree on and appreciate the differences in the beliefs and opinions of others.

Be authentic and welcome that from others: Speak authentically from your personal experience. Personal stories open our hearts. If you don't have personal experience with having or knowing someone who has had an abortion, you still have a story. How you have experienced the debate, your feelings about it, when you first realised the eighth amendment was a problem, your fears about it etc.

Be purposeful: Notice if what you are conveying is or is not pertinent to the topic at hand. And notice if others are taking the conversation off track. It is okay to not be too strict. After all what we want is good conversation that flows and also builds relationships. Find a balance between being proactive and gentle.

Overall, to get supporters to feel confident launching such conversations (no easy task!), a fair amount of guidance and coaching should be provided upfront, as well as ongoing support.

Uplift Ireland provided supporters with a tiered guide system, including a quick guide for busy folks and then a step by step guide to convos including interactive elements like quizzes.

Here are some sample instructions from their Quick Guide:

Here are the basics - *practice* and you will have everything you need to have conversations that are productive and constructive, particularly when discussing issues that are traditionally tough to navigate.

Remember, these conversations are not easy, that's why they don't usually happen!

Before you start:

- Take a moment for yourself. How are you feeling?
- Have a few grounding, deep breaths.
- Have a healthy snack, seriously! Research shows that we all function better with a little fuel in us as it helps us to think more clearly.
- Set your intention. You are talking, not debating, with another human. You do not have to have all the answers to begin and you do not need to be perfect.

Some good things to keep in mind:

Though this guide is not for engaging 'extremists', there are many things we can glean from this talk by self-proclaimed former-extremist Megan Phelps-Roper. What changed her mind? What got her to see things even a little differently? Watch the video and see how she found the simple (but not easy!) principles below as her guide through difficult conversations and ultimately towards a new perspective:

- *Don't assume bad intent - people surprise us all the time!*
- *Ask questions*
- *Stay calm - this takes practice and patience, but it's powerful*
- *Make the argument - be able to logically present your ideas*

Here are some longer-form conversation guide examples:

- Uplift's more advanced conversation guide
- Australian marriage equality conversation starter kit

4. Trainings in person and online to prepare volunteers

Volunteers on persuasion conversation campaigns face a number of challenges. The conversations often trigger emotional responses that are difficult to deal with. Transforming another person's perspective rarely comes as an immediate epiphany, which means that volunteers rarely experience a rewarding "aha moment". More often, the people they speak with will wrestle with the new lens offered to them for weeks or months before they truly take it on. This can make progress opaque or make success feels painstakingly slow, even though persuasion conversation campaigns often lay the foundation for profound social change.

As such, it's vital that volunteers receive training to set realistic expectations, develop the skills they need, and establish community with other volunteers so that they can overcome obstacles together and commiserate when the work is hard.

Training sessions both online and offline

Trainings offer supporters the opportunity to ask questions and develop a deeper understanding of the campaign and their role in it. Consider these examples:

In the U.S. marriage equality campaign, Freedom to Marry organizers held trainings that ran 45 minutes or longer to acquaint canvassers with the questions on the script and allow them to practice asking probing questions. Even after this training, it often took canvassers several attempts to become comfortable asking personal questions of voters.

In Uplift Ireland's abortion rights campaign, they set up several different training webinars for different supporter roles. Teams had their own zoom meetings, and people late to come in watched the original training session - but because it was a 3 month campaign there was one main induction period.

Their recorded group training session via videoconference is available here on Crowdcast: https://www.crowdcast.io/e/lqn8ums7

Digital tools for team coordination and convos at a distance

As with distributed organizing, persuasive conversation campaigns require digital infrastructure to help coordinate with supporters and teams at a distance. Many leading campaigns use Slack teams and videoconferencing software such as Zoom as platforms for team coordination and training.

In the Irish abortion referendum campaign, Uplift tested some more sophisticated tools to enable digital conversations including Mobilisr, a peer-to-peer messaging program, in the run up to the vote. People used it to get in touch with their Facebook Messenger, WhatsApp, and Telegram contacts to either start a conversation about abortion care, or ask them to get out and vote.

Support desk to help answer volunteer questions and dispatch conversations

Uplift also used Freshdesk, a helpdesk-like customer support tool, to setup an efficient volunteer assistance service, mostly manned by other volunteers.

One volunteer also trained and supported a team of “e-Repealers” who offered undecided people the opportunity to have a conversation via email using Freshdesk.

Though at times a little rough-and-ready, this program was entirely volunteer run. The program fostered earnest and often complicated discussions between very different people.

Tricky parts/ fixes

- Engaging in open conversations without a written script can be challenging for supporters. Even after training, it often takes supporters several attempts to become comfortable asking personal questions of those they engage with.
- Longer and challenging conversations led to increased expenses: The complicated and long nature of the conversations can make large-scale programs, volunteer or paid, expensive endeavors.

Further resources for persuasive conversation campaigning

- Article in Science which reports UC Berkeley, Stanford Study and Finds Los Angeles LGBT Center's Canvassing Conversations Reduce Voters' Anti-Transgender Prejudice
- Freedom to Marry's guide to Values-Based Conversations
- How We Can Reduce Prejudice with a Conversation | David Fleischer | TEDxMidAtlantic
- Live example of a persuasive conversation approach on transgender rights
- Mobilisation Lab article: How powerful conversations won abortion rights in Ireland
- ChangeMakers Podcast Episode 5: Marriage Equality

Attribution

Input and resources for this framework were provided by:

Clodagh Schofield with Uplift Ireland, Jasmine Somaiah with CallHub, guides provided on the Freedom to Marry site, content on the Australian marriage equality campaign presented in this ChangeMakers podcast episode and materials from the Victorian Trades Hall Council.

This framework was prepared and reviewed by:

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Section 2.

Tactical online-offline approaches

Digital tools that allow for organizing and mobilizing at scale have made a whole range of people-powered approaches accessible to progressive campaigners. Some of these approaches live entirely on digital, some cross over between online and offline modes and some are primarily offline but coordinated thanks to digital communications platforms.

Tactical online-offline approaches

Guide Summaries: Click on titles to go directly to the guides

CROWDSOURCING IDEAS AND CONTENT FROM SUPPORTERS

Crowdsourcing is the process of opening a creative or problem-solving exercise to include input from a wider group outside of the usual inside thinking and decision-making channels. In this guide, we look at different tools and tactics for successfully working with supporters to build everything from group visions to slogans, images, and videos.

CANVASSING AND DOOR KNOCKING TOOLS ROUNDUP

This Tools Roundup is a deep dive into the best tools to facilitate in-person door to door canvassing actions – the offline bread and butter of many campaigns. Groups use canvassing to talk to stakeholders about issues that matter to them, spread their message, and recruit new volunteers.

SUPPORT AND COACHING FOR REMOTE GROUPS

As digital group-work tools make it easier to coordinate teams at a distance, campaigns that access them can now scale rapidly and build collective impact through distributed organizing. This guide tackles the challenges of this kind of organizing, including how to deal with the lack of face time and direct human contact. There are new ways to support these groups at a distance and maintain a sense of purpose and togetherness -- no matter where they are in the world

TEXTING CAMPAIGNS

Peer to peer texting is a method for contacting supporters via text messages to deliver calls to action. This guide tackles how and why to engage P2P texting platforms, as well as the resources needed to deploy a texting campaign.

VOLUNTEER LED PHONEBANKING

Volunteer-led phone banking uses campaign volunteers to reach out to voters and supporters through phone calls. This guide includes the different uses of phone banking (supporter identification, voter persuasion, event invites, fundraising, volunteer recruitment, and Get Out The Vote (GOTV) efforts) and looks at tactics to run an organized and successful phonebank.

CROWDSOURCING IDEAS AND CONTENT FROM SUPPORTERS

Summary: Crowdsourcing Ideas and Content from Supporters

Crowdsourcing is the process of opening a creative or problem-solving exercise to include input from a wider group outside of the usual inside thinking and decision-making channels. The wider concept of crowdsourcing includes solicitation of "user-generated content", which can include multimedia creative submissions.

In advocacy and movement-building, this can mean asking your supporters for their ideas to build a group visioning process or for their input on proposed policy platforms or even strategic campaign plans. The user-generated content side of advocacy crowdsourcing typically involves organizations receiving and using creative concepts from their base in campaign communications. Such creative can include campaign slogans, custom re-branding, images and videos.

Who else is crowdsourcing from supporters?

In advocacy:

Internet and media freedom advocates OpenMedia have done extensive crowdsourcing to build their policy platforms and more. In Canada, digital campaigners Leadnow.ca also partnered with Open Media to gather public input to reimagine the future of the country's main public broadcaster. In 2015 Our Tomorrow, a joint effort by over 100 LGBTQ orgs, held a vast crowdsourcing exercise in the U.S. to help determine the future direction their movement should take, as informed by their base. Greenpeace Germany has used a crowdsourcing platform to find creative and communications concepts for their Save the Arctic Campaign. Various climate campaigns and the Support. Don't Punish. drug policy campaign invite and make use of user-generated content including slogans, campaign logos, memes and more.

In policy-visioning:

The Roosevelt Institute's Next Generation Blueprint is a crowd-sourced position document. This student-created policy agenda was designed as a rallying cry for the values of the student network, an agenda for legislators to address, and a method of thinking about values-based areas of focus which that could be paired with specific policy recommendations.

The writing of document was proof of it's thesis, as it involved a series of back-and-forth exchanges of information between groups of Roosevelt stakeholders and Roosevelt staff. Everything in the document, including the eventual thesis, came from spaces built with stakeholders, and the result was a high degree of buy-in throughout the student network.

In politics:

At the height of its recent political and economic crisis, Iceland launched a process to crowdsource a new constitution, which is finally making its way towards implementation. In Spain, the progressive movement-generated Podemos party has used crowdsourcing and participatory policy creation from the beginning. In Quebec, Canada, a vast digitally-assisted citizen consult, including kitchen table discussions and larger assemblies, was held in 2016 to build a new progressive platform and to reinvigorate progressive politics there.

Case study focus: OpenMedia

OpenMedia, one of the main groups across the world active on the issues of Net Neutrality and media freedoms, has engaged in a long line of crowdsourcing projects, experimenting thoroughly along the way and refining the practice more than most other groups in the process.

In 2008, when facing off on the first big Net Neutrality battle, Open Media turned to its community and actively sought citizen testimonials in order to bring public voices to policy debates. In 2010-2011, when the Canadian government was considering a usage-based billing structure for internet data, Open Media's supporters raised the issue as a top concern and the organization decided to open up wide to supporter input, raising 500K signatures on a petition and then unleashing a torrent of supporter-generated artwork and thousands of comments, which were reflected back to the community and then sent to the CRTC (Canada's federal comms regulator). When a regulatory official then went on record to say that citizen input was irrelevant, it cost him his job, generated a lot of media attention and Open Media was able to force a policy decision in line with public, not corporate, interests.

Having used crowd input to fight bad policy, Open Media then decided to engage its community's intelligence in positive visioning. In 2012-2013, over 40, 000 participants from over 155 countries participated in building a collective vision of what a global digital policy framework that served peoples' interests would look like. The result is their **Our Digital Future report.** Open Media now continually bakes crowdsourcing and listening practices into its campaign design process, asking for ideas on tactics and even what future issues to campaign on. As a result, the org has developed a highly loyal and participatory supporter community.

Why should you crowdsource from your supporters?

Immediate benefits from crowdsourcing include gaining insights from your base and drawing on "collective intelligence" to open new strategic and creative pathways for campaigning organizations.

Involving your base as participants in thinking and creative exercises also **deepens member engagement** and a sense that there is a meaningful role for supporters to play in building the campaign/organization.

When crowdsourced policy proposals are presented in political advocacy, they carry a lot more weight as they genuinely represent a multitude of voices.

According to Open Media, when organizations actively listen to their base and show them that they value their ideas and input, this build a much more loyal and engaged supporter base that translates into higher response rates on actions and more effective fundraising.

When crowdsourcing might not work for you

According to Steve Anderson founder of Open Media, the biggest issue is org capacity. Because active crowdsourcing does take a lot of time and resources to initiate and manage properly, and because the ROI from these activities (engagement and eventually better fundraising) doesn't kick in right away, embarking on crowdsourcing requires strong leadership, vision and commitment right through the organization. If short-term metrics are all that count, this will be hard to sell through.

The other issue is whether the org culture and structure is a fit for crowdsourcing, which requires opening up to supporter input and actually doing something with it. Some orgs are top-down in structure and led by folks who think they have the best ideas and not much to learn. Such groups have a culture that doesn't value their community, which they view as data points or just a number on their mailing list count. In Open Media's case, there was a sincere belief that the supporter community sometimes had the best ideas and over time, even a commitment to let supporter input override staff ideas and plans.

Finally, if your organization's identity, ideas and branding are firmly nailed down due to funder demands or a (probably antiquated) fixation on the power of the organizational brand, you might find it tough to do anything with the inputs you get from a crowdsourcing exercise.

If your supporter base feels they contributed and gave you their time and effort for no good reason, this could lead to backlash so be careful about what kinds of power and prominence for supporter input is proposed upfront. Ultimately, if you can't deliver on your promises, it could end up being more damaging than doing nothing.

Crowdsourcing at different levels

Crowdsourcing can take different forms, from light input to collective policy design.

At the simplest level, it can involve calling on public feedback in response to existing campaign plans, documents or other communications.

As part of a creative process, crowdsourcing can involve public call-outs for slogan ideas or submissions of supporter-generated artwork.

As a passive process, organizations can search through supporter-generated material and highlight it in their communications back to their base.

Case study: Below, OpenMedia shares the different crowdsourcing initiatives they have deployed

ONGOING DIALOGUE: This is the lowest effort method and simply requires reviewing online/offline community input review and thought before producing output. This is roughly the method we used for Casting an Open Net and at OpenMedia we mostly do this without thinking about it. We have Slack channels devoted to this form of input. This mode of crowdsourcing does require ongoing dialogue with the community obviously.

COMMENT THREADING: Pulling demonstrative comments from our community into blogs and other content. The comment in this blog is a good example. There's no better way for us to operate as a community platform than to ensure direct community comments are included in our content.

THEMATIC INPUT: Call for community input through email and/or blogs or social media and break down comments into rough themes. Use the themes to instruct presentations and key meetings. Here's an outreach example, and an example of a crowdsourced presentation.
We sometimes use our Internet Voice tool to collect input for this method.

QUANTITATIVE AND QUALITATIVE ANALYSIS: See the methodology section here. We collect input through various methods including our Internet Voice Tool and Crowdsourcing tool.

CROWDSOURCED PLANS: Usually our Crowdsource reports and policy plans include all of the above. We basically see every interaction with our community as an input point we use to shape our detailed policy proposals. Our Privacy Plan in Canada is good example.

Case study: Below, Alan Smith describes how the Roosevelt Institute build the Next Generation Blueprint as a collective policy-visioning process

The Roosevelt Networks, with the creation of our Next Generation Blueprint, "laid out a student-created policy agenda that we hoped legislators would address, with values-based areas of focus paired with specific policy recommendations. Because, as Roosevelters wrote, "we believe that it matters who writes the rules, not just what rules are written, it includes recommendations for rethinking how young people engage in the decision-making process by increasing voter access and diversifying the pool of emerging leaders." The final report also includes a lobbying tool—a tearaway set of recommendations for how political leaders can engage with the millennial generation."

Quoting from: Organizing First: A Case for a Hybrid Version of Stakeholder Engagement

What crowdsourcing requires (people, resources, etc.)

According to Open Media, the first thing you need is an audience or a community to source from. In other words, a database of supporters that is easy to reach out all at once. This is usually built up over time through low-barrier actions such as petitions and other signup-driving campaigns.

At its most basic form, crowdsourcing could require no extra infrastructure and just staff or supporter time invested in interacting with supporters on social media and noting their input. This requires a person/people who can put out content, converse, and bring back input to the campaigns team.

If the input sought is quantitative, ie. what percent of people care about x issue, then you will need to configure and use some kind of online survey tool like survey monkey.

If the input sought is creative, ie. users have to write and submit texts, produce videos, images etc., a simple and easy-to-use portal/ application may need to be created for this. For their wider survey consult, Open Media created a ‘drag and drop’ policy construction tool. Our Tomorrow, for its part, created a custom web portal for the submission of short texts and videos.

Crowdsourcing takes time. For user-generated content, the promotion of the request for input needs a few weeks to get out there through repeated callouts. Your supporters also need time to respond and provide content though having a clear deadline is key here as well as you cannot keep people infinitely engaged. If the crowdsourced content is extensive and you plan to make use of it in a formal report, leave at least six months time for the process from start to finish.

Crowdsourcing setup: steps and stages

Build an engaging frame for participation

To motivate your supporters to participate in any crowdsourcing exercise, the “why” of participation must be clearly established. What will this participation change? Will this use of time be meaningful, will it lead to something tangible that justifies my use of time? Organizers must clearly think through how they answer these questions upfront as part of the call to action.

Here is some direct guidance on the above, drawn from OpenMedia:

Show a compelling THEORY OF CHANGE that works.

Research shows that those who do not take action are held back because they did not believe that their actions would have an impact.

- Provide a roadmap that shows how the process will work - how they will get from A to B and make a difference.
- Illustrate the theory of change as much as possible: When we ask people to send a message to regulators, we also say that if you submit a message we’ll attend a hearing on your behalf and that the combination of citizens speaking out, alongside expert testimony, will create a powerful force.
- Clearly illustrate that we can work together to create a positive vision for the future and bring it fruition.

Make participating clear and easy

Encouraging your supporters to submit their thoughts and creative concepts is already a big ask. The clearer and easier you can make the assignment, the higher your participation rates will be.

For example, when asking LCBTQ supporters about their hopes and vision for the future of the movement, Share our Tomorrow did not ask for essay-form submissions but rather the following short-format answers:

1. My hope for our tomorrow is _________.
2. I worry that __________.
3. One thing our movement can do to make our tomorrow brighter is _________.

Below, OpenMedia shares their suggestions for how to clearly structure crowdsourcing asks:

MEET PEOPLE WHERE THEY ARE AT: provide a range of activities at different levels of engagement.

AS A GENERAL PRINCIPLE MAKE COMMUNICATIONS ACCESSIBLE AND LINK TO MORE IN-DEPTH MATERIALS FOR THE KEENERS. You have to get people in the door before you can meet them and build a relationship.

STRUCTURE THE PARTICIPATION so that people can engage at the level they are comfortable with.

Petitions, written letters/phone calls, social media engagement, surveys/interactive tools, in-person events/canvassing, creating their own content and becoming community leaders in their own right.

Some members of our community will be very knowledgeable and have a lot of time and energy for our projects. It's important to facilitate those deeply engaged in your processes — these participants are leaders in the making. Others just want the facts and a simple way to identify with the project — these folks just want to raise their hand with us and we should respect that.

Establish a culture of conversation with your base

The more you ask your supporters for input, the easier this process will flow. Two-way interaction with campaign organizers doesn't come naturally to everyone at first but if it is regularly encouraged, it becomes a reflex.

Here is some advice from OpenMedia on how to build this "culture of conversation"

BUILD RELATIONSHIPS:

- Build relationships and communities not just lists or data points.
- Look at your first interaction as an introduction and your communications as a dialogue.
- Relationships should have MEANING AND PURPOSE. (For example, the purpose could be to be working together to stop online censorship.)
- Facilitate lateral communication between members of our community. At OpenMedia we invest in capacity to support community conversations on our website and social media.

LOOK FOR OPPORTUNITIES FOR DEEPER AND MORE FREQUENT ENGAGEMENT and pull it into the mix of our project.

- Example: while we were working on our Casting an Open Net report we had a meeting with the Industry Minister come up out of the blue. Instead of just holding a regular meeting, we crowdsourced the questions we asked the minister and used the community input we received for our report. That wasn't planned in advance but we saw it as an opportunity for deeper input and engagement.

Mirror-back the value of supporter participation

Supporters who contribute to your campaigns with ideas or more need to see the value of their help reflected in your communications back to the base. Conversely, keeping their contributions for yourself in a black box will quickly discourage further participation.

Here is some advice from OpenMedia on how to show your supporters that you value their participation

GIVE RECOGNITION:

- Cynicism is our greatest enemy. As much as possible put on display the impact participants are making in the world.
- Research shows people want the satisfaction of an emotional meaningful experience. Recognizing those who make efforts in your project is a great way to model a participatory process and to keep our community engaged over the long term.
- It may be obvious to recognize large policy changes, but it's just as important to show how participants have made an impact on smaller pieces of our work, such as when our efforts are picked up in the media. No victory is too small to recognize.

- Understand participants and the community as the protagonist of the story. Good or bad, the world really does change based on how and in what ways we participate in our society. Let's remind ourselves of this fact.
- Communicate and popularize the idea that we all have a right to participate in decisions that affect our daily lives.
- Find opportunities to let community members know how valuable their contributions are and give back when you can (Hold events and meetups, workshops, webinars, make sure they're included, prizes, etc).

Bring people into every stage of the process.

If you are seeking the deepest buy-in and engagement of your base in the effort, then it is worth involving them in the creation of the crowdsourcing exercise throughout the process.

Case study: Here is a detailed account of how the Roosevelt Institute built their process and involved stakeholders every step of the way

The writing of the Next Generation Blueprint document started with engaging stakeholders around the very notion of the document being a good idea. This happened via a series of back-and-forth exchanges of information between groups of Roosevelt stakeholders and Roosevelt staff. Everything in the document, including our eventual thesis, came from spaces built with our stakeholders, and the result was a high degree of buy-in throughout the student network.

The process started with a group of twenty-two alumni and students who were already handpicked as super-users. They had demonstrated a long-term dedication to and interest in Roosevelt's work. To help guarantee that the early idea-creation phase never became completely open ended, participants were given an initial set of readings, which included a paper that had been written by Roosevelt thinkers. Discussion around this document, Rewriting the Rules of the American Economy, gave rise to the eventual thesis.

With an initial thesis set, Roosevelt turned to the entire network of students. Using an online survey, Roosevelt recorded students' priorities vis-à-vis a series of different issue areas. Questions were designed to get both objective rankings of and subjective opinions on seven different policy areas. The survey was designed with assistance from the original steering group and then forwarded to the entire network.

Using this data, Roosevelt staff built discussion groups of student and alumni experts in the top three issue areas. That meant creating spaces for feedback: guided two-hour video calls organized around education, economic development, and human rights, in which students and alumni reacted to the survey results and sketched the framework for concrete policy recommendations that accomplished the lofty goals put forward by the survey.

The iterative process continued with staff writing up the conversations and the same groups meeting again to critique and improve the product.

Share ownership of crowdsourcing outputs

Part of the unspoken code of public participation is that if you are asking for donated concepts and content, then that crowdsourced material should be considered shared intellectual property that is made available to the entire base of supporters who participated.

Here are some thoughts on this from OpenMedia

- People in our society have been told that they do not have control over decisions that govern our society. Our communications and interaction with our community should reinforce a sense of agency, power, and collective ownership.

The tricky parts of crowdsourcing and some fixes

One of the biggest pitfalls here is opening the gates to input too widely and ending up with a huge database of random ideas and input that you can't make sense of or use strategically.

Steve from Open Media suggests the following:

- Frame the parameters of the input clearly. If you want to talk about government surveillance only, then be clear that you aren't looking for input on Facebook's monitoring of consumer behavior. Be clear and prescriptive.

He also recommends seeking specialized help when writing up formal reports that draw on crowdsourced input if the hope is for it to be taken seriously by decision-makers. He observes that all campaigners don't necessarily have great report-writing skills.

Another fix, suggested by Alan who worked with the Roosevelt Institute, is designing the ASK with a set of stakeholders, from the very beginning. People get that we've got to be narrow, so making them vote on only a few things, or be a part of the narrowing and honing processes means that your decision of focus points will ring true to the people you then need to weigh in.

Michael Hoffman from GatherVoices has the following observations on challenges and solutions specific to sourcing User Generated Content (UGC):

- Most people watch and don't create unless they have a good reason to, so the challenges to UGC start with the motivation and the messaging. Tell me why I should care? Tell me what difference it will make? Tell me why this is a central ask as part of a campaign? Show me how others are doing it. Alan Smith notes here that if you explicitly make your supporters the 'figureheads' of collective creation, they will be motivated by this attention to contribute.

- There are a thousand ways to deliver content and so when you just ask someone for content they are likely to give you something that doesn't fit with that you wanted. It will be too long or too short and it won't say the things you need them to say. This is true of text or photos or video. For example, you may need someone to mention an advocacy target or specific legislation and if you aren't prompting them to do so the otherwise great content would be useless to the campaign.

- That is why we create forms for text, but have more challenges with forms for video. For video specifically, there are choices of orientation (vertical, horizontal or square) and of quality level. And, unless you specify a way to deliver the content, you are liable to get a mix of emails, Dropbox files, YouTube links and assorted other delivery methods which are likely to be incompatible with each other and create a lot of management work for the campaign.

Further resources for crowdsourcing

For a deeper dive into the nuts and bolts of crowdsourcing and User Generated Content, we recommend the following:

Articles:

- Great writeup of the Roosevelt Institute's Next Generation Blueprint crowdsourcing project
- Open Media's Crowdsourcing Principles

- Open Media's Crowdsourced Report: Our Digital Future
- Stanford study of political crowdsourcing
- Global Solutions Networks overview of crowdsourcing applications
- MobLab article on crowdsourcing by Greenpeace Germany
- SSIR piece on LGBTQ movement crowdsourcing campaign
- Update piece on Iceland's crowdsourced constitution

Who can help with crowdsourcing?

Providers, consultants, trainers….

NetChange Consulting (consultants, trainers)
Hattaway Communications (consultants, agency)
GatherVoices App (app that makes it easy for supporters to submit their own videos for campaigns)

Attribution

Input and resources for this framework were provided by:

Steve Anderson, founder of OpenMedia, who have generously made public many of their learned experiences on crowdsourcing for advocacy. Here are their own participant credits: *Thanks to Reilly Yeo who was involved in our crowdsourced processes in our early work as well as the* Crowdsourcing Masterclass *sessions that she taught with our founder Steve Anderson. Thanks also to community engagement specialist* Dave Meslin*, Soledad Vega, and the entire OpenMedia team and collaborators past and present.*

Content was also provided by Michael Hoffman from GatherVoices App, Mobilisation Lab's crowdsourcing articles and Doug Hattaway's account of the Our Tomorrow campaign, Alan Smith and the Roosevelt Institute's Next Generation Blueprint project.

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TOOLS ROUNDUP:
CANVASSING AND DOOR-KNOCKING

Canvassing Guide (from Organizing for Action)

*This guide was put together by **Organizing for Action (OFA)**, a community organizing project of the Democratic National Committee.*

What is a Canvass?

Canvassing refers to going door-to-door in a neighborhood and having conversations about important issues with community members. It is an essential component of organizing. We use canvassing to talk to voters about issues that matter to them, spread our message and recruit new volunteers. The results of every conversation are recorded so we can make sure we are organizing in the most efficient way possible and focusing on what's most important to voters. Organizing for America's success in 2010 depends upon our ability to share our message through as many discussions with voters as possible.

Thanks for your interest in putting together a canvass. This guide will walk you through each step of the process and provide you with all the resources you'll need to be successful. Good luck!

Why Do We Canvass?

Canvassing in local neighborhoods (both at the doors and in high traffic areas) is the most effective way to talk with community members about the issues that matter to them. Our success on the Obama campaign and in advocating for health insurance reform depended upon our ability to share our message through face-to-face discussions with voters. We need to let our neighbors know about our efforts and invite them to join us!

Where Do We Canvass?

Usually the goal of any canvass is to talk to as many people as possible. Therefore, we want to target areas that are dense with people and allow us to easily talk to them all. We recommend canvassing both public locations and going door-to-door in neighborhoods. Public locations should be areas where people pass by regularly. Good canvass spots include grocery stores, sporting events, public transport stops, fast food restaurants, parks, college campuses, etc. It's important to have several back up places in case the location is unsuccessful or the canvasser is asked to move. Make sure your canvassers know not to be discouraged if they are asked to leave a location – flexibility is key.

Door-to-door canvassing should focus on dense neighborhoods that are easily walkable. You want to choose neighborhoods where the houses are relatively close together and you can hit as many doors as possible.

We do suggest that you do not schedule voter contact events before 10am or after 9pm.

Planning a canvassing drive

Step 1: Select a Staging Location

Determine where your "staging location" will be. That is where people will gather before and after the canvass. Your staging location can be a private home, park, school, or any other location that will accommodate your group and allow for a brief training.

Step 2: Recruit Volunteers and Build a Team

Invite as many volunteers as possible to participate in your canvass. Make phone calls and tap into your network of friends, neighbors, and colleagues to find volunteers. You may also want to create your own flyers promoting the canvass and post them at your local coffee shop, grocery store, or library.

It's often helpful to distribute the tasks involved in running a canvass. You may want to consider finding volunteers for the following roles:

- Canvass Coordinator – coordinates splitting up neighborhoods, identifying high-traffic locations, and makes maps, as well as helping to prepare, distribute and re-collect canvass materials.
- Volunteer Recruitment Coordinator – responsible for reaching out to volunteers, confirming volunteer canvass sign-ups, and managing volunteer sign-in on canvass day.
- Resources Coordinator – Helps to find and secure the staging ground; a place to meet before and after the canvass. This person may need to consider parking needs, restrooms, etc. This person also helps to get donations of food and water to sustain canvassers.
- Trainer – this should be an experienced canvasser who can talk through how canvassing works, as well as explain why the neighborhood and the people you're contacting are important. This person also should be able to set and communicate a clear goal that will motivate and focus volunteers.

Step 3: Prepare all of your Materials

Create a list of canvass locations, keeping in mind that you want to canvass in walkable neighborhoods and high-traffic public locations. Be sure to photocopy enough maps for everyone to have one and delegate out an appropriate amount of streets for each person. Here's a list of other items you might need to have ready:

- Map and Walk List - Your walk list is made up of the households you must visit and will be provided by the canvass organizer (Most often an OFA staff member or regional leader). Each page of your walk list will include only the houses on one side of one street and will be in the order that is easiest to walk them. Its best of you pair the walk sheet packets up so that two people can walk in the same area together.

- Script - The script will be provided by your canvass organizer and is meant to act as a guide for your conversations. It will feature a number of questions you should ask the voters you speak with.

- Tally Sheet - The tally sheet will typically be a part of your walk list. It is critical that when you talk to each voter, you code your conversations correctly on the walk sheet with their answers to the questions in the script. Accurate data is essential to our organizing efforts.

- Campaign Literature - Give each voter one of these. If the person is not at home, leave the literature with someone else or on his/her doorstep. Do not leave any literature in the mailbox as this is illegal.

- Pens and a Clipboard - Be prepared by making sure you have supplies to make canvassing easier, have enough pens and clipboards for your entire team. Having a clipboard to write on will make recording the results of your conversations much easier.

- Comfortable Walking Shoes and Water - Tell your volunteers to be prepared for spending a few hours on their feet and to bring water for while they're out.

- Contact Information - Exchange cell phone numbers with the staff or other volunteers you are working with, in case you get delayed or lost.

Step 4: Make Reminder Calls

Be sure to make reminder calls to everyone who has signed up online or has told you verbally they plan on attending. Turn out will increase dramatically if you ask them for a firm commitment.

Sample Agenda For Your Canvass

This agenda is meant as a suggestion to guide you through your canvass. Feel free to adjust the agenda to best suit your neighborhood and participants.

Welcome and Introduction (10 min)

If possible, have each person introduce themselves by name. Have two people share their personal stories, addressing what is at stake for them personally. Stories should give a human side to our organizing work and remind us of the real impact of the decisions made in Washington.
Also be sure to explain why you're knocking doors today and what the group's motivation and ultimate goals are.

Set expectations (3 min)

Share your goal for the number of doors you are trying to knock and the number of people you are trying to reach. Put this number into perspective by reminding your volunteers that they are part of a huge effort with thousands of volunteers across the country engaging in similar efforts.
Review the script and role play with a partner (5 min)
Have all your volunteers take some time before you begin to think of a one-minute explanation of why they are volunteering for Organizing for America. Read the script out loud and ask if anyone has questions. Practice what you are going to say when you knock on the door. Let people know that it's alright to share their story in order to personalize the message, but that they should try to answer all the questions on the script.

Explain logistics (3 min)

Address how people should organize in groups, give any necessary transportation details and pass out materials.

Hit the streets! (3 hours)

Check on your team during the action. As the event host, it's your job to keep your team motivated. Collect cell phone numbers and text updates about your group's success! Example: Alex got his first signature, Caroline's out of pens because she's had so many signups, etc!

Debrief (15 min)

At the end of the canvass have everyone tally up the number of doors they knocked and the number that were successful contacts. Gather the information and make sure the data has been entered or will be (There should be a staff member or regional lead who will collect data). Present how your group fared overall and ask those who did well what made the difference. Ask those who struggled what the challenges were that we need to prepare better for next time.

Don't forget in your debrief to let people know about your next event or how they can get more involved in your local group.

Celebrate!

If possible, organize a potluck or an optional social gathering afterward. Talk about your success together!

Tips for Canvassing

Follow your walk list.

Knock on every door identified on your walk list, and don't stay too long at a door. Leave literature at every listed door, even if the person is not home. Try to talk with the voter listed on the sheet and only visit the houses on the list unless your canvass organizer specifically tells you otherwise.

If you speak with a member of the household other than the voter on your walk list, do not record the responses as those of the person on your list. You should simply report the voter as "Not Home" and move on to the next house.

Stay safe!

Don't go inside houses, even in a group. Don't knock on a door you feel uneasy about. Don't offer to shake people's hands at the door - it can often put people off - but shake their hands if they offer.

Things to Remember while Talking to Voters

Smile!

This is the most basic rule of voter contact. If you look and sound like you are enjoying yourself, people will be more interested in engaging in conversation with you and discussing what issues are important to them.

Stay positive!

As a volunteer, you're here to excite voters about the President's agenda and the work Organizing for America is doing - not to weigh them down with complaints about the opposition or their viewpoints. Comparisons are good, but keep a positive focus on the President's goals. And don't argue with people who disagree with you. Kindly thank them for their time and move on. Your time is valuable, and there are a lot of voters to contact.

Don't pretend to be a policy expert.

It's likely that someone will ask you a question to which you do not know the answer. That's okay. You should never be afraid to admit you do not know the details of one of the President's policies. If you aren't sure, say just that.

Follow the script, but speak from the heart.

You will be provided with a script and information on the issues to help you engage voters. But you should use the script as a guide and feel free to explain to voters what inspired you to work with Organizing for America. Your personal story will always be the most effective way of engaging with voters.

Capture Information

Reporting good data from your canvassing is just as important as actually talking to the voters. Understanding what voters think about important issues helps us ensure we are running the most effective organization possible.

Also, make sure to enter the information from you sign-in sheets. Remember this is very important as it allows Organizing for America to gauge the impact of your group and gauge what additional resources we can provide.

Thank your guests

Send a personal email thanking everyone who participated in the canvass. Be sure to stay connected with your fellow volunteers and get ready for the next action!

Sample canvassing scripts (from CallHub)

Taken from this article on the CallHub site

Voter identification script

A voter ID script is used to identify the voter, where they stand, how they might vote and what issues concern them. It is a brief script with the goal of getting to as many voters as possible.

Only if the voters feel that you are listening to them will you know what they really think. The important thing to do is to connect with the voter.

First, identify that you've got the right person.

Start with: **"Hello, may I speak with *<name of the voter>*?"**

The sooner you have them talking, the better the chances are of having a conversation. The conversation here is guided.

Next, introduce yourself.

For example, **"I am a volunteer/student intern with the *<name of campaign>*"**

You want them to know that you're not a paid professional but rather a volunteer who is passionate about the candidate or cause.

Next, ask the question.

The question should be short for which they will have an opinion, this will tell you if they support your candidate or not.

For example, **"Do you think that we should cut state income tax?"**

These open-ended questions can initiate a conversation without appearing to be biased and can make the voter see the other side of the argument, thereby giving an honest viewpoint. This helps you see how the individual voter sees certain issues, which can be recorded to be used later in the campaign.

You want to get an honest viewpoint for questions dealing with issues like health care, education, gerrymandering or environment. For example **"What do you think about the lack of funds given to public schools?"** or **"Do you think gerrymandering is ethical?"**

Avoid giving voters the **"I don't know"** option. This will make more voters go with the undecided option than stating their opinion.

Keep in mind to ask questions in a casual way which would keep them interested. *An uninterested voter* will not give you the right information as they'd simply want to get done with the conversation.

Volunteer recruitment script

This script is directed toward voters who are identified as *staunch supporters* of your candidate.

The script should be interactive and it should engage the potential volunteer in a conversation about what is important to them, the various problems to be resolved and the need for them to act now.

The prime reason why people don't volunteer is that they are never asked to! Instead of directly asking for help, you could start off by **thanking the voters** for their support.

For example **"We wouldn't be where we are today without your support."**

The key is to *tap into the matter that concerns the voter*. Bring in a local issue or a problem that needs to be solved; the volunteer can then persuade the voter to act upon it.

Related: How to write a phone banking script

For example **"*<name of your candidate>* is willing to bring in certain changes about the safety of your neighbourhood. Are you willing to do the necessary?"** Conclude with:

"Can *<name of your candidate>* count on you for your help?"

Voter persuasion scripts

A persuasion script is used to ***sway undecided voters*** to vote for your candidate. It is usually longer than others and engages the voter in a conversation about relevant issues in their constituency.

Reconnect with a voter who was previously identified as undecided and whose prime concern was an issue close to your candidate. The goal is to persuade the voter to vote for your candidate by using this information.

Use the data collected during voter identification stage to tailor a message to undecided or opposition voters. For some healthcare would be the key concern, tap into this to get support.

First, start off by explaining the campaign to the voter by highlighting their key concern.

For example **"*<Name of your candidate>* has worked hard to bring in better health care services in this neighbourhood. They have talked and listened to the problems of the neighbourhood and plans on bringing in a change."**

Some voters are not issue-oriented. That is because they don't follow politics closely. They tend to vote based on who they like or based on commonalities they have with the candidate. In such cases, you can highlight your candidate based on family background, community service, military service, gender, or leadership experience.

Don't expect swing voters to have a sudden epiphany and be swayed by your conversation. If they are swayed, get them to subscribe to election alerts, get their emails and phone numbers for follow up campaigns.

In conclusion, stay connected with the undecided voter and always come back to the reason you're there in the first place, your candidate.

For, example: **"*<Name of the voter>* can *<name of the candidate>* count on you for your vote?"**

Get out the vote (GOTV) script

The GOTV script is used to ensure your core supporters *don't forget about Election Day and help people get to the polls if needed.*The script aims to ***increase voter turnout*** and motivate the occasional but supportive voter to hit the polls. The volunteer must keep it local and positive.

One thing to keep in mind is that it's not about you rather it's about them, the voter. Subtle changes in language can make a big difference in the impact of your script. Consequently, avoid using lines like **"I need you to vote"**, say:**"We need you to vote."**

If voters intend on voting, give them information about the polling station and the ideal time to cast the vote.

Avoid persuasion during GOTV. Your goal is to reach the maximum number voters so don't get drawn into conversations or arguments. It is not a persuasion campaign and for that reason move on to the next voter if the former is not interested.

Remember to **contact voters who live alone** as they are less likely to have a plan as compared to the ones living with their families.

Always close by thanking the voters for their time. For example: **"Thank you for your time. Have a great evening."**

Training videos on canvassing, door knocking and persuasive conversations

Canvass Training from Mobilize America
https://youtu.be/aQoJMZAfRlI

Canvassing 101 from SwingLeft Academy
https://academy.swingleft.org/training/canvassing

Uplift Repeal Training: Persuasive Conversations
https://www.crowdcast.io/e/lqn8ums7/register

Effective Conversations from SwingLeft Academy
https://academy.swingleft.org/effective-conversations

Attribution

Input and resources for this framework were provided by:

Mobilize America, SwingLeft Academy, Organizing for Action, CallHub

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SUPPORT AND COACHING TECHNIQUES FOR REMOTE GROUPS

Summary of: Support and Coaching

As digital group-work tools make it easier to coordinate teams at a distance, campaigns that access them can now scale rapidly and build collective impact through distributed organizing (see our guide on this for more). One of the challenges of this kind of organizing is that the lack of face time and direct human contact can lead to engagement and morale drop off. Several groups that have sparked remote teams and chapters have now developed ways to support these groups at a distance and maintain a sense of purpose and togetherness with their supporters no matter where they are.

Who's supporting and coaching remote groups well?

The groups innovating here are ones that have invested deeply in a distributed organizing model. Pioneered by early adopters like 350.org and Hollaback!, remote support systems were refined during the Bernie campaign's extensive volunteer mobilization and are now being replicated by a host of newer distributed movements including Indivisible, ACLU's People Power program and Team Internet fighting for net neutrality.

Why should you support remote groups?

To start with, the benefits of scale and impact that come from a network of remote supporter team/groups is covered in our distributed organizing guide here.

If your group is already on board with a distributed organizing approach, then sooner or later you will need to refine your coaching and support practices in order to:

- Maintain remote supporter enthusiasm and commitment
- Keep volunteers and teams throughout your network aligned on overall goals and milestones
- Build movement energy that can only be fed by human interactions

When supporting and coaching remote groups won't work

As with distributed organizing in general, it is a lot harder (if not impossible) to implement many of these practices without basic access to online tools and platforms.

A second barrier to consider is digital security and privacy. Many of the free and affordable tools used to coordinate remote group work are vulnerable to surveillance.

Using secure alternatives is sometimes (but not always) possible and adds friction to the process, which needs to be planned for if your digital risk assessment shows a need to heavy encryption and identity protections.

What supporting and coaching remote groups requires

Digital platforms for group work and meetings that are accessible and user-friendly

This can include:

- Webconferencing software (like zoom or maestro conference)
- Collaborative document software (like google docs)
- Group chat software (like slack)
- Direct chat software (like Whatsapp)

Dedicated staff or volunteer support teams

Some core people in your central organizing group will need to carve out time and make themselves regularly available to lead calls and answer questions coming in from remote groups/supporters.

Team Internet, for example, has a dedicated team of volunteers whose sole purpose is to support other volunteers who have taken on the organizing and hosting of events.

An attitude of trust and support with regards to volunteer supporters vs. a tendency to micromanage

This basic posture will go far towards building leadership and autonomy within remote groups and will reduce the demands on central staff.

Setup + stages for supporting and coaching remote groups

Process design

Choose a process for how you will create and manage teams. Team Internet, for example based their model off of of Rules for Revolutionaries, Becky Bond and Zack Exley's model deployed during the Bernie Sanders primary race. However, you can also feel free to design your own process to suit your goals and to respect your resource limits. This design process essentially comes down to visualizing the supporter path from initial outreach, through sign on, basic training/orientation and then regular supervision/coaching.

Questions to ask yourself:

- Do you have the tools and process set up for each step of the way?
- How are you tracking supporter activity?
- How often do you plan to round up supporters with a group talk?
- What triggers the need for an individual check-in?

Setting up support team(s)

Make sure staff or volunteers are briefed and ready to deal with new teams/recruits.

Onboarding remote teams

This is a process in itself that needs to be thought through in advance especially if large numbers of new recruits are going to be coming in.

To onboard new recruits, Team Internet had set up a system of 3 initial intake / orientation calls per week at the height of their campaigning phase. These calls would include general intros to the campaign and the larger issues of net neutrality that were at the heart of it, what is going on at this moment in time and introduction of the work teams. Since they were using Maestro Conference for these calls, new recruits could vote on which work team they would like to join right off the bat.

Activation through training/coaching

Training and coaching get new helpers started on the right path but are also important for making them feel welcomed to a new team and well-supported. Another benefit of a mandatory training process is that it makes commitment to the campaign's goals more official and weeds out people with only a passing interest in participation.

Here, Team Internet had set up a 1hr 15 min basic training session through webconference and then a 2 week coaching period during which time other volunteers would be assigned to help new recruits. For work teams with more complex tasks, new recruits watched a training video and then had to fill out some online forms (confidentiality etc.) before they got started.

Regular check-ins

Maintaining regular contact with remote teams is essential for morale and group energy.

Team Internet had scheduled regular weekly zoom meetings for supporters working on complex tasks for close to a year. These check-ins were used for relationship building, providing resources and support for questions. In doing so, they realized that the calls were important because their supporters were motivated not only by a desire to help but also because they wanted to connect with other likeminded people.

Best practices for supporting and coaching remote groups

Use the right platform

Sho Konno formerly with Restless Development observes that webconferencing platforms are only good for remote support and coaching exchanges that are mostly one way, such as highlighting case studies, running through things together (where supporters benefit from hearing your voice) and calling out volunteers to highlight their contributions.

For more interactive personal exchanges, Sho would use Whatsapp to set up one-on-one's with individual supporters and work out issues that way.

Icebreakers + energizers

To break up the stiffness and distance of webconference check-ins, icebreakers can be a good way to help participants get to know each other better. Examples include talking about really fun concerts you went to, places you would love to live in someday, draw how you're feeling and show it to the group or funny polls done live through webconference platforms. Essentially, whatever would be done to build energy in a face to face workshop should be adapted and tried in an online setting to make up for lack of physical contact.

On internal channels, like Slack, Alison from Team Internet underlines the importance of funny gifs as well as shout-outs and other forms of validation to help keep the personal team bonds going.

One-on-ones

Sometimes, a little time spent one on one with a remote supporter can go a long way. Alison from Team Internet says that the volunteers that have stayed on the longest are the ones she spent the most time with. These one-on-one calls or chats are spent truly listening with heart and mind open and hearing what volunteers are saying and addressing their concerns and expectations.

Volunteers taking over leadership and management of remote teams

Remote teams that get involved in the decisions around group management tend to stay more engaged and put more energy into group work. The key, according to Alison at Team Internet, is defining the autonomy remote team leaders can have within a centralized plan. In their experience, they had a lot of success allowing volunteer supporters design the training program and create materials to help train new recruits.

The Tricky parts of supporting and coaching remote groups, and some fixes

Different tech cultural preferences across geographic areas

Campaigners with experience running international distributed campaigns point out that that local partners will have different (divergent) preferences when it comes to digital communications platforms.

Sometimes this relates to technical difficulties (e.g. poor fixed-line broadband / good mobile broadband leading people to favour Whatsapp over anything that's PC-based).

But some many times it's a matter of familiarity. The Slack environment, for instance, might appear friendly and easy to use for someone who's technologically savvy, but others might find it incredibly challenging; even alienating.

So, instead of wallowing in frustration when people do not migrate en masse to Slack =) they have come to accept that they will have to continue deploying a range of communication channels to cater to different preferences / levels of familiarity to these tools. Whilst at the same time nudging people into these more collaborative/interactive platforms.

Unpredictable tech and bandwidth

These can become big barriers since a lot of remote group management is facilitated online.

Sho Konno suggests finding alternate platforms for communication that are not synchronous, like Whatsapp, when online connections get spotty.

Further resources for supporting and coaching remote groups

Wirecutter's list of recommended webconferencing hardware and software: https://thewirecutter.com/reviews/the-best-tech-and-apps-for-your-home-office/#web-meeting-and-call-recording-gear

Attribution

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TEXTING CAMPAIGNS

Summary of: Texting Campaigns

Peer to peer texting is a method for contacting your base via text messages to deliver calls to action. Usually done at high volumes, it requires a P2P texting platform and a group of staff or volunteers to deploy the campaign. (True person to person texting, ie. texting one's own contacts using your personal device as part of a campaign, would fall under the heading "phone/text banking" and will be treated in a separate how-to).

Who's using texting well?

During the Bernie Sanders primary race, the Text for Bernie program sent 8 million messages to rally support for the candidate, almost all of which were sent by volunteers using P2P texting apps. Also using P2P texting are Vote.org, Color Of Change PAC, Movimiento Cosecha, ACLU, Working Families Party, Greenpeace and many more.

Texting campaigns case studies

ACLU's People Power Launch

The American Civil Liberties Union's People Power program kicked off in March 2017 with a "Resistance Town Hall" in Miami, Florida, featuring allies, celebrities, and ACLU leaders. The Town Hall was live-streamed to thousands of watch parties around the country. In order to recruit hosts and attendees to the parties, the organization relied heavily on peer-to-peer texting (P2P) via Relay.

The ACLU began by recruiting a large group of volunteers to serve as texters, convening them in a Slack for training and rapid communication. Next the volunteer teams sent text messages (as well as email blasts) inviting ACLU members to host events. Once hosts were established, the ACLU then texted any supporter within 15-20 miles of an event, inviting them to attend.

Results:

108867 people texted
35% response rate
22% agreed to attend
2200 parties held nationwide

Movimiento Cosecha

In the face of escalating attacks on immigrant communities, Movimiento Cosecha has assembled a diverse, decentralized, and powerful network of organizers and activists fighting back in 20 states.

Cosecha first experimented with peer-to-peer texting (P2P) in February 2017, following Trump's inauguration. They wanted to reach new people and recruit them to come to Boston for a three-day migrant resistance training, but they were having a difficult time getting responses via email. So they decided to try Relay, a P2P texting platform. Their texts garnered a 23 percent response rate, and ultimately they surpassed their original goal for participation. The event drew more than 350 people, and helped launch the "Day Without Immigrants" protest in May.

Results:

2979 supporters texted
42% response rate
350 agree to attend

Why use texting?

Higher open and response rates

Text messages are recorded as having a much higher open rate than emails (more than 80 percent estimated) and recipients don't have to opt-in.

Text messages also have a much higher average response rate of ~20%.

Communications with a personal touch

One of the reasons P2P texting is so effective is because it mimics how people already use texting--for talking to friends and family. P2P texts come from a local cell phone number and contain personalized information about the recipient and sender. Because recipients feel like they are talking to a real person (which they are!), they're more likely to read, ask questions, and take action.

Reaches new audiences

Groups organizing immigrant communities for advocacy, like Movimiento Cosecha, point out the fact that texting is a much more natural and engaging channel for their community versus web platform-based communications.

Engages new supporter segments

According to ACLU People Power campaign organizer Nicole Fairall, engaging supporters in P2P texting campaigns allows groups to activate volunteers who might otherwise not be able to participate in events or other activities. People who have disabilities, lack transportation, or live in rural areas, can use the P2P platform to participate in the advocacy effort from their homes.

Can be fun as group work

Less demanding than phone-banking, P2P texting leaves time for supporters to chat together while reaching out and several groups have organized 'textathon' parties with music and drinks to make it all more fun for those involved.

Can be used to drive different actions

While P2P texting lends itself well to political campaigns, especially get out the vote (GOTV) drives, it is also effective when driving people to participate in demos, events and trainings.

TCPA Compliant (for the U.S.)

Your volunteers are manually hitting the send button for every text, with texts going out from a ten digit number. This ensures TCPA (Telephone Consumer Protection Act) compliance, letting you legally text anyone you have a number for whether they've opted in or not. All things considered, your campaign will receive better response rates and engagement from people who've opted in to receive texts. But for campaigns like GOTV efforts where you're texting people off the voter list, peer to peer texting is your biggest ally.

Natural Data Collection

Data on voters and supporters are collected as part of personal conversations rather than passive surveys. This prompts more people to share information, with details about who agreed to attend an event, how a voter feels about a candidate, or pledges to donate, recorded then and there on on-screen forms by volunteers.

When texting campaigns might not work

If your campaigning structure is not set up to recruit, train and oversee large numbers of supporters to run a texting drive (ie. you don't have an existing supporter-organizing game), then you will find it next to impossible to set up a P2P texting operation.

P2P texting campaigns are designed to drive people to take some kind of simple next step such as signing up to attend an action, committing to contact their representative or showing up to vote. If you campaign has no clearly defined next step or opt-in destination, then P2P texting efforts may be wasted.

P2P texting is not free or very low-cost. At scale, P2P texting can be expensive because pricing is based on amount of numbers contacted. While individual messages may just cost pennies, this adds up to hundreds or thousands of dollars in fixed costs as campaigns get successful. And even though most campaigns can be run by volunteers, considerable staff time does need to be put aside to oversee the operation.

What texting campaigns require

Action plan

All good P2P texting campaigns start with a clear idea of the simple immediate outcomes that you are driving your base towards. In other words, what are you trying to get people to do? Typically, this involves attending an event or demo, showing up or registering to vote or signing up to participate in some kind of mass action, online or offline.

People power

You will need a group of supporters that are willing to roll up their sleeves and join in the P2P texting effort. This is usually a commitment of several hours over a couple of weeks.

Database

You will need good lists of your supporter mobile numbers, ideally broken down by region and exportable in spreadsheet format (Excel, CSV etc.).

Platforms

P2P texting campaigns are managed and run through proprietary software platforms such as Relay, CallHub or Hustle.

Staff and financial resources

Overseeing an active P2P texting campaign will require the full-time attention of 1-2 paid staffers.

P2P texting platforms will determine pricing based on volume of contacts or the amount of messages sent. The service costs typically run at 8 cents (USD) per message or 22 cents per contact (USD) but can climb into hundreds of dollars per month when texting volumes run into the thousands.

Setup + stages for texting campaigns

Setting up the P2P texting platform and sendouts

Activate and configure an account with a P2P texting platform such as Relay or Hustle and then do the following:

1. Write the script for the initial messages and replies for approval (review process can start while everything else is getting set up)

2. Pull your contact list from your database (CRM, csv file or other). Upload into the P2P texting software platform (Relay, CallHub, Hustle etc.) Here, you can also use software integrations to directly sync contact lists from your CRM into your texting tool.

Finding and onboarding your P2P Texting crew

To gather your volunteer texters, you will need to reach out to your base and recruit these "high-action takers" willing to spend some time learning this new skill and participating, either in a shared location or remotely, in the P2P texting effort.

P2P texting and the platforms it works through will be new for almost all of your volunteers and you want to make sure they know what they're doing. Having well-trained volunteers will drastically cut down on the support you need to offer once they get started.

On Text for Bernie, Relay founder Daniel Souweine set up a self-service approach to training, which cut down on scheduling allowed texters to self-educate and opt-in from there.

Here are some sample tools for self-service training kits.

- Video
- Quiz

If you are running a smaller operation for a shorter amount of time, you may want to do a series of live webconference trainings with batches of new recruits.

Managing volunteer teams

Most P2P texting campaigns start by signing their volunteers up to a Slack channel to ensure quick and steady communication for scheduling and other issues. Trello is another complementary system that can flag outstanding group tasks and works well with Slack.

Use comms channels such as Slack to dispatch urgent requests but also as open question and answer spaces. If the community on your channel is strong, volunteer texters can often answer each other's questions.

Also use these channels regularly to boost morale by reporting on specific milestones with stats and shout-outs to recognize the hard work that volunteers are putting in.

Scheduling volunteers

In order to have your volunteers send texts, you have to know when they are available. Best practice here involves creating "shifts" that are between 200 and 500 messages, and letting volunteers know that a "shift" takes place over the course of about 48 hours -- which is how long it takes for replies to come in and conversations to run their course. It's important to make clear that a shift is not complete once they send out their initial messages. The real work is in responding to replies and collecting data using survey questions.

It's also important to try and spread out assignments so that each new volunteer gets something to do so that they feel valued and needed.

Some days fill up better than others and when Nicole at ACLU found it hard to fill up schedules, she would send a call for help through the groups Slack channel asking for more volunteer signups on that given day.

Tracking results

Throughout the campaign, check every evening to ensure all the assigned texts went out or are currently being sent. When running texting with NextGen and the Bernie campaign, Nicole Fairall reports that there were routinely a number of unsent texts that had to be cleaned up and finished by a sub-group of "all-star" volunteers who made sure everyone got replied to and that all responses are recorded.

Texting platforms integrate survey questions such as whether or not the recipient will attend an event you are promoting. It is important to track and compile response rates for such questions once a week to make sure that outreach is working well.

Platforms also allow the data from outreach, including positive responses to invitations, to be exported into other supporter management platforms such as Action Kit so that event and outreach management with your base can continue there.

Best practices and texting etiquette

Here are some principles for best-use of P2P texting thanks to the folks at Relay.

Use "peer senders." People are more likely to engage with someone who they perceive to be "just like them." If possible, use non-staff to send your messages. And if you do use peer senders, make sure your recipients know by saying so in the message.

> Hi %FirstName%, this is %SenderFirstName% volunteering with Bartlett for President. We are having a big event in %City% on Saturday. Can you make it?

Start with a question. The best way to start a conversation is to ask a question. So, whenever possible, end your initial message with a question mark to spark a dialogue. For example:

> Hi %FirstName%, this is %SenderFirstName% from Bartlett for President. We are having a big event on Saturday. Can you make it?

Introduce yourself. A great way to personalize your text is to introduce yourself. We think it's best to identify yourself and your organization in the first sentence, like this:

> Hi %FirstName%, this is %SenderFirstName% from Bartlett for President. We are having a big event on Saturday. Can you make it?

Leave something out (when optimizing for conversations). Another way to get conversations going is to leave out information from your initial text. For example, you might tell someone that there is an event in their town, but not the exact address. If they're interested in attending, they'll ask for more details! This tip may make less sense if you are optimizing for clicks or other forms of conversion.

Don't be too formal. Text messages are mostly used for communicating with friends and family, so are more likely to have a casual tone. Keep your messages easy going and conversational to match the medium.

Keep it brief. Similarly, you should avoid excessively long texts, especially for the initial message. Text messages are sent in blocks of 160 characters. So anything above 160 characters will split into two messages for most carriers. If you can keep your initial message to 160 characters, that's ideal. But if not, you should definitely strive to be below 320.

Avoid "textese." Since the rise of smartphones, people rarely use "textese" like "i will txt u l8r," so avoid unnecessary abbreviations, capitalize the first word of your sentences, and include standard punctuation.

Personalize your initial text Your first text should answer three questions most people ask themselves when they give a text the once over.

‘Is it meant for me?’ i.e. Are they just another name on a list, or, is this text meant specifically for them

‘Who is this?’ i.e. Do they know the person sending the text
‘So what?’ Now that they’ve read the message, what is the next course of action

The questions are answered in three simple steps—personalize, identify, and prompt.

Personalize your message for each individual contact—“Hi %FirstName%”
Identify yourself and your organization—“this is %SenderFirstName% from Bartlett for President”
Prompt them with a call to action or a question—“Can you make it?”

And of course, a healthy dose of emojis helps ensure that the receivers treat the text like it’s from a real person and not an automated tool.

(There are instances when you’d want to strike a more authoritative tone rather than a friendly one. We recommend testing your texts to find the tone that your audience relates to.)

Decide on conversational vs informative texts: Peer to Peer messaging is built for personalized conversations. And most people take that to mean that if contacts are not replying in large numbers, they’ve fallen short on engagement. That’s far from the truth. Take two instances of outreach for an upcoming event.

The goal of the initial P2P text is to nurture the audience and to get them talking and interested in learning more about the event. So, an initial text that prompts a response makes sense here.

“Hey Jon, this is Melinda from Hope Society. We’re holding a rally next Saturday to support the Clean Energy Act ✊. There’ll be snacks and drinks □. Want to come?”

This text is meant to initiate a conversation. It instills curiosity about the event prompting follow-ups about where it’s going to be held, what time it’s going to held, if there’s going to be transportation facilities and so forth.

Next comes the follow-up reminder for everyone who agreed to attend.

“Reminder for Clean Energy rally tomorrow at 221B Baker St, Marylebone from 3pm to 6pm. See you there!”

The text is meant to be informative, not conversational. A horde of incoming replies to this reminder is a waste of your staff time.

Although people will still reply to this text enquiring about one thing or another, the response rate will be far lower owing to its informative nature unlike the conversational nature of the previous text.

This is just one example to drive home the point that you have to reflect on your goal and then decide on making the distinction between informative and conversational text messages

Make sure your links are short and clickable. When adding links to your initial message or your recommended replies, use a URL shortener like bit.ly whenever possible. Also make sure your links begin with http:// so that all phones will interpret them as clickable links. Finally, check your message length (considering variable contact/sender name length) to ensure that no URLs get cut in half between 160 character message segments.

Schedule strategically. The overall “arc” of a texting campaign is usually 24-48 hours. That’s how long it will take for all of the responses to come in and all of the conversations to be completed. So make sure that your senders are prepared to continue answering questions and recording data intermittently during that time window.

Opt-out gracefully. It’s inevitable: some people won’t want you to text them. When you receive an opt-out request (“stop”, “unsubscribe”, “remove me from your list”, etc.) it’s important to honor the request promptly and courteously. After you press the “opt-out” button you’ll have the opportunity to send them a pre-loaded confirmation message that you’re welcome to modify.

Tricky parts of running texting campaigns, and some fixes

Overwhelming volunteer response

Nicole Fairall reports that when asked to join P2P texting activities, very large numbers of volunteers immediately answered the call-outs in the campaigns she ran.

Due to the volume, her teams had to make onboarding and training processes as streamlined and self-serve as possible as one-to-one sessions with new recruits would have been impossible.

In response, they created an onboarding email including all the basic steps to get started and used a starter video provided by Relay, which gave new recruits a visual intro to the functions on the texting platform. They also sign people up to slack and provided them brief google doc with FAQs and login information to help them get active on the P2P texting platform.

Texting fatigue

As P2P texting gains in popularity and people find themselves targeted by multiple campaigns, some pushback has been recorded and people in the campaigning space have talked about the rise of 'texting fatigue' if the practice is overdone or misused.

Generally, pushback comes from people being over-solicited by P2P texting campaigns or not having their questions answered once they have been reached out to by texters,

In response, experienced texting campaigners suggest not reaching out to people more than 1x a week.

When someone requests to be taken off your lists, in whatever way they choose to say it, you should process their opt-out to make sure they don't get left on the list. They also recommend letting people know you are opting them out so they have confirmation that their request has been heard.

Also, if people on your lists have not responded after 3 or 4 waves of outreach then they should be removed.

Relay offers the following additional text etiquette rules to make sure people continue responding well to P2P texting campaigns:

- **Introduce Yourself**—In most P2P texting programs, the texter will not personally know their recipients. Which is why we highly recommend scripts that introduce the sender and the organization they are texting for. Messages without that information won't just be annoying, they'll likely be confusing and ineffective too

- **Answer Every Question**—P2P texting is about having conversations, which is why we tell every client, if you're not prepared to answer questions, you shouldn't be texting people in the first place. We know that some P2P texting programs are organized to simply send outgoing messages and ignore any replies. To those programs we say emphatically: you are doing it wrong!

- **Respond Quickly**—While texting is not instant message, it's also not email. When people send you a text they expect a speedy response, and it's in your interest to meet that expectation. The faster you respond, the greater chance the person is still available to finish the conversation and (hopefully) say yes to whatever you are asking them to do. You should answer questions as soon as possible—ideally within the hour. If you can't get right back to someone, we recommend a maximum of four hours delay.

Further resources for texting campaigns

P2P texting webinar featuring Thais Marquez from Movimiento Cosecha
https://powerlabs.io/text-messaging-for-organizers/

Social Movement Technologies' online course
https://courses.socialmovementtechnologies.org/p/text-messaging-for-organizing

Civicist articles on P2P texting
https://civichall.org/civicist/revolution-text-me/
https://civichall.org/civicist/texts-for-bernie-lives-on-in-issue-driven-campaigning/

Texting best practices by Relay on Medium
https://medium.com/@daniel_37850/how-to-not-ruin-texting-in-2018-9bf398caaa8a

Texting guides and best practices from CallHub
https://callhub.io/13-best-practices-you-must-follow-for-peer-to-peer-texting/
https://callhub.io/collective-texting/guides/

Who can help with texting campaigns?

Consultants, trainers:

PowerLabs

Social Movement Technologies (email them directly to inquire)

Platform providers:

Relay
Hustle
CallHub

Attribution

Input and resources for this draft were provided by:

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VOLUNTEER-LED PHONE BANKING

Summary of: Volunteer-led Phone Banking

Volunteer-led phone banking uses campaign volunteers to reach out to voters and supporters through phone calls and is now most often supported by software that helps dispatch calls among volunteers and log progress. Phone banking is effective for supporter identification, voter persuasion, event invites, fundraising, volunteer recruitment, and Get Out The Vote (GOTV) efforts.

Who's doing volunteer-led phone banking well?

LGBT rights group NEAT made more than 70,000 calls to voters to help pass legislation for same-sex marriage in the United States.
Organizing For Change, a coalition of environmental organizations in Canada, used phone banking to drive more than 60,000 calls to British Columbia voters to get them out to vote in their recent provincial elections.
Other groups using phone banking include Human Rights Campaign, GetUp!, The Greens Party (Australia), The Australian Conservation Foundation, The Wilderness Society, Democrats Abroad, and AVAAZ.

Why run volunteer-led phone banks?

- Have personal conversations at scale
- Communicate with voters when door-to-door just isn't feasible
- Have passionate volunteers living in non-election states call across state lines to voters in swing states
- Gather valuable information about voters that will affect campaign messaging.

To engage people in personal conversations

Phone calls are a personal medium of communication that lets your campaign forge long term relationships with people. When voters hear the voice of a passionate volunteer on the other side of the line, advocating for a cause they believe in, they are more likely to hear them out. Phone calls are also a great platform to engage people in open-ended conversations of the sort which have been proven to change people's minds.

Collect data on preferences and supporter levels

Most phone banking tools come with built in surveys that allow volunteers to collect data on supporter levels, voter issues, supporter interests, event invites and more. The data

is then used to created targeted messaging for future outreach. If the tool has robust integrations, all collected data instantly flows back to campaign management software/databases like NGPVAN, Action Network, NationBuilder etc.
When Organizing For Change used phone banking for their Get Out The Vote drive, they partnered with researchers at the University of California Santa Barbara to run experiments during the calls in order to measure the effectiveness of of the approach in engaging people on the issues they talked about. Overall, they found that using phone banking helped increase voter turnout by 7%.

Run a distributed campaign

Once you've created a phone banking campaign, volunteers can sign up from around the world to make calls on behalf of your candidate or cause. A dearth of local volunteers won't put a dent on your outreach efforts. Supporters can sign up to make calls from the comfort of their homes, talk to the people on the contact list using their phone or browser, and have all the data flowing back to the central database. A strategy many campaigns follow is to run their ground game with local volunteers and have volunteers living elsewhere make phone calls.

Easier onboarding for volunteers

All it takes for a volunteer to start making calls for your campaign is to sign up on the campaign website through an embeddable form. These volunteers can then log into the agent console of the phone banking tool to receive access to calling scripts, surveys, event invites, and of course get assigned people to be contacted. Bear in mind that not every volunteer will follow through on their commitment to support your campaign. Many phone banking tools solve for this by dynamically assigning contacts to volunteers. That means, a volunteer is only assigned a person to call if they are actually logged in and ready to make the call. Volunteers can make as many or as little number of calls as they want and organizers can be safe in the knowledge that no contact is left out.

Scalable outreach

If you don't have a dearth of volunteers and are not stressed for time, manual dialing is a great way to reach out to people. But as the campaign progresses, you'll want to scale up outreach efforts, and automated dialers are more suited to handling higher call volumes. Campaigns usually go with manual dialers or automated dialers during the voter identification and voter persuasion stage and use the predictive dialer for Get Out The Vote calling at key moments.

As a campaign grows and build alliances with other organizations and grassroots groups, these organizations can be easily integrated into a central phone-banking platform, making it easy for the groups to collaborate their calling efforts without having to worry about duplicating efforts and ringing the same supporters more than once. For Organizing For Change's GOTV campaign, 24 groups all agreed to allow OFC access to their lists in order to segment and sort them, ensuring voters were only called by one organization and that each organization had a list that matched their capacity.

Drive Lobbying Strategies

Several phone banking platforms offer a "patch-through calls" features, which can be used to connect supporters to their elected representatives, or other campaign targets, in order to drive mass lobbying efforts. NEAT uses this tactic in their campaigns for LGBTQ+ justice: "*When we find people that support an issue, we can transfer them at their request to leave a message with their local elected official to let them know how they feel.*"

When volunteer-led phone banking might not work for you

When you don't have enough volunteers

Calling is a people-heavy task. And depending on the type of calling you're doing you'll need from a handful to tens or hundreds of volunteers to run phone banks. A single volunteer manually dialing through a list can dial around 35 numbers and talk to about 10-15 people (not everyone on your list is going to pick up the phone). If you're using an automated dialer that'll increase to about 45 dials and around 25 conversations per hour. With a predictive dialer, it increases to around 110 calls dialed and 45 conversations. Bear in mind that these numbers are dependent on your contact list. Compare it to a peer to peer texting campaign, where a single volunteer can reach out to an estimated 1000 people in the span of an hour and you'll see that, you'll need to recruit a lot of volunteers to reach out to the same numbers as you'd with peer to peer texting.

No database of numbers

If you've not built up a database of people with contact numbers, you cannot run phone banks. And the quality of your phone banks depends a lot on the quality of your lists. For example, if you are using voter lists obtained from state party offices, there's a good chance that you'll encounter a lot of bad numbers. Platforms like NGP VAN have their own database of contacts that they make available to Democratic candidates in the U.S., which are of higher quality than state voter lists. You can also use private list vendors like L2 Data, Aristotle, Target Smart etc.

You need a budget to use automated dialers

Automated dialers can give you a three fold increase in the efficiency of your calling. But unlike manual phone banks where volunteers make calls from their personal phones, calls made through an automated dialer are paid for by the campaign. They won't burn a hole in your wallet, but if you're on a tight budget, make sure to create a detailed plan and budget before you start making calls.

For reference: A browser based calling platform will cost you around 3¢ for one minute of conversation. i.e. a single volunteer making an hour of phone calls will cost you around $1.5 with an auto dialer (45 dials, 25 contacted) and around $2 with a predictive dialer (110 dials, 45 contacted). To put that into perspective, reaching out to a 10,000 strong contact list will cost around $350 with an auto dialer and $400 with a predictive dialer.

When you want to drive rapid response actions

Rapid response actions are time-sensitive actions that require you to reach a large audience in a limited time. For an effort like GOTV, were you have a day or more to drive voters to the polls you can make do with a Predictive Dialer. But when it's a rally to be held in a matter of hours, or a protest that requires on the spot updates, calls aren't the best option to get the word out. Peer to peer texting or text broadcast is more suited to this scenario.

What volunteer-led phone banking requires

A central plan and database

It's imperative that you keep track of who you are contacting, how many times each person has been contacted, and that all the calls tally up to the final goal. The 2016 Bernie Sanders primary campaign succeeded in their massive volunteer-driven voter contact effort because they managed to split up the voter universe into finely targeted lists that were distributed between volunteer leaders in local chapters. Volunteers would engage the assigned list, gather information (supporter levels, issues, event RSVPs etc) and update it to the central database.

Having a central plan and database helps avoid the problem of different local chapters/volunteers contacting the same people over and over, resulting in a lot of wasted effort that doesn't contribute to the final goal, and ends up frustrating your supporters. Ideally, you should use a campaign management software/database like NGPVAN, Action Network, NationBuilder or any other database to keep track of your calling, or at the very least make sure that you are collating all the data into excel sheets.

Contact lists

You need to build, purchase, or rent quality contact lists of phone numbers that are up-to-date. Without it, your volunteers will spend more time listening to dial tones and marking bad numbers (unless it's an automated dialer which skips bad numbers) on survey forms than on actual conversations. Phone number verification tools and list append software like Accurate Append can help you filter out bad numbers and update the data on your lists.

Volunteers

Depending on the type of calling you're doing (voter ID, persuasion, GOTV), the dialing mode you're using (manual, predictive, auto), the number of voters to be reached, and time to be spent talking to an individual, your volunteer requirements will vary. Plan ahead for your phone banks considering all of these factors. Wellstone has a good PDF resource on Volunteer Voter Contact Formulas that'll help you with planning.

Software

Without a good phone banking tool, you'll have to resort to printing out call lists, having volunteers got through the list to make calls and have them enter the data back to a central database. A phone banking tool takes care of all of that, leaving a volunteer free to have meaningful conversations.

Phone bank organizer(s)

Most people signing up as volunteers to make phone calls will have little to zero experience making phone calls and using a particular software to do so. A phone bank organizer can be a volunteer themself or a paid organizer who is assigned to volunteer groups to manage training and onboarding into the campaign. Once the phone banking campaign gets rolling, the organizer also makes sure that volunteers are filling in survey responses, having engaging conversations, and avoiding arguments.

Funds

While some phone banking campaigns are distributed, ie. performed by volunteers from their own chosen locations with their own computers, centralized phone banking operations (all volunteers under the same roof) cost money for office space and equipment. Make sure you budget according to the number of people you have to reach. You can save on costs by asking volunteers to brings their own devices, be it laptops or cellphones. Opting for browser-based calls lets you further cut down on costs with the added benefit of not needing to install any software.
A browser-based calling platform will cost you around 3¢ for one minute of conversation. i.e. a single volunteer making an hour of phone calls will cost you around $1.5 with an auto dialer (45 dials, 25 contacted) and around $2 with a predictive dialer

(110 dials, 45 contacted). To put that into perspective, reaching out to a 10,000 strong contact list will cost around $350 with an auto dialer and $400 with a predictive dialer.

TCPA Compliance (U.S.)

The U.S. TCPA (Telephone Consumer Protection Act) regulations prohibit calls to cellphones using automated dialers. Make sure that you're only using automated dialing to contact landline numbers. For calling cellphones, stick to manual dialing, either using printed call sheets or a virtual phone bank like Collective Calling or the VAN Open Virtual Phone Bank. Both these tools make the process of manual dialing easier by displaying contact details that volunteers use to dial from their phones and letting them record call details on-screen, thus saving time on data entry.

Setup + stages for running volunteer-led phone banks

Define and prepare phone banking campaign objectives

When setting up an initiative such as supporter identification, voter persuasion, event invites, fundraising, volunteer recruitment or Get Out The Vote (GOTV) efforts, define targets in terms of minimum-maximum amounts of people to be reached and calculate the staff/time required to execute.

As a reminder, here are some benchmarks to help with planning:

A single volunteer manually dialing through a list can dial around 35 numbers and talk to about 10-15 people (not everyone on your list is going to pick up the phone). If you're using an automated dialer that'll increase to about 45 dials and around 25 conversations per hour. With a predictive dialer, it increases to around 110 calls dialed and 45 conversations. Bear in mind that these numbers are dependent on your contact list.

Choose your dialing mode

Choose the mode of dialing that you're going for – automated or manual and then sign up for an account on a phone banking platform.

If selecting manual dialing because you are dialing cell phones in the U.S. or you want to let volunteers use their own phones, you can still make use of a virtual phone bank system like Collective Calling or the VAN Open Virtual Phone Bank. Both these tools make the process of manual dialing easier by displaying contact details that volunteers use to dial from their phones and letting them record call details on-screen, thus saving time on data entry.

When selecting an automated dialer (using a phone banking software platform) here are two further options to consider:

Auto Dialer: The Auto Dialer lets you control the speed of dialing and the time when the call is to be placed. After a call, the volunteer has time to fill in surveys and notes, and then click a button to place the call to the next person on the contact list.

Predictive Dialer: A Predictive Dialer constantly evaluates the number of free volunteers, number of calls getting dropped, and the average ring and talk time. It uses the data to adjust the number of dials being made, and screen unanswered calls to maximize the time your volunteers spend talking. You'll need at least six volunteers making calls at a time to make the most of a Predictive Dialer.

Upload your list manually or use integrations

When using phone banking software, upload your contact list as a CSV file or use integrations to directly sync contacts from your database into the phone banking tool.

Create your phone banking campaign

Start creating your campaign. This is where you add surveys for collecting data, add events, and set the schedule for your calling campaigns. Again, if the phone banking tool has integrations with tools like NGP VAN, Action Network etc., you can directly import events and surveys from these platforms into your phone banking campaign.

Recruit and assign volunteers

If you already have volunteers recruited into your campaign, you can use their email to directly add them to calling campaigns. If not, use embedded forms provided with the calling tool to allow people to sign up to make calls from your website.

Managing teams (collaboration)

Nurture an environment of collaboration where an open channel of communication exists between your volunteers and they feel comfortable seeking help from each other. You can onboard new volunteers to a Slack channel or WhatsApp group and encourage them to talk over these channels across the duration of campaigns. Having all your agents together on a communication tool also lets organizers quickly convey instructions and campaign updates.

Analytics and Reporting

Your calling campaigns bring in loads of data that should be parsed to optimize future outreach efforts. Set daily goals and track the progress you've made on your list.

Measure agent occupancy rate (percentage of time volunteers spend on calls against idle time), call drop rates, reach rate (percentage of calls that were picked up), number of call attempts and other metrics that you can use to improve your phone bank.

Testing the tech beforehand

As much as we hope that platforms will perform flawlessly, Celine from Organizing for Change flags the need for testing of the phone banking system before deploying with large numbers of volunteers.

"Another big learning moment for us around tech, was that we needed to test things more rigorously. At peak times, the predictive dialer and server shutdowns started happening. We need to figure out a way to test the tech at the volume that we will be calling."

Troubleshooting volunteer-led phone banks

Tech issues

Though tech providers work on preventing this, phone banking software can jam up, servers can fail and this can be frustrating for volunteers, who already feel daunted by the challenge of calling up people they don't know.

To address this, Celine Trojand from Organizing for Change reported the following practices:

- "In some cases, when the predictive dialer didn't work and volunteers called multiple people, all we could do was be as communicative as possible with the solutions. It helped to have people on phone support to communicate with volunteers and walk them through troubleshooting. It was important to let everyone know the problem and the solution. Being responsive and letting people know we were working hard for them was key. We also had a couple of analog back ups -- solutions like a folder a phone numbers in spreadsheet form. If someone was having so much trouble that they couldn't use the tech, we would go analog.

- We had to prioritize our volunteer experience so that they would come back. We were very responsive, communicative and has many plans to knock down a list.

Data entry

Data gleaned from every phone banking campaign goes into tailoring future outreach efforts. Whether it be the people identified as supporters, or those who agreed to attend an event, collating the data is crucial when deciding your next step. If volunteers making calls are not properly advised on the importance of data collection, many of them tend to focus just on the conversations and the calling script without marking responses on the survey forms. You can avoid the problem by incorporating a training routine into your phone banks for new recruits that takes them through the whole process. The training module doesn't need to be live. It can be in the form of a presentation, a Trello board, or a pre-recorded video.

Predictive dialer

When using a Predictive Dialer, the people at the other end of the line can experience a slight delay (1s - 1.5s) between picking up the call and getting connected to a campaign volunteer. The Predictive Dialer essentially calls a list of telephone numbers, screens them and then connects only answered calls to free volunteers. While this ensures that volunteer talk time is maximised, it also causes the slight delay after pickup. The first instinct of a person picking up the phone is to say 'Hello', and by the time your volunteer gets connected, that person would have been done with the initial greeting and will be waiting for a response. If your volunteer is not aware of this, it can be slightly off-putting. But if they are, they can just go ahead with the script without waiting for a greeting.

Bandwidth issues

Campaigns that have had a large number of volunteers making calls through a browser can face issues with loss of call quality, calls getting dropped, and longer wait times. The issue appears for virtual automated dialers and is attributed to higher loads on the internet without enough bandwidth to handle these loads. Make sure that you have enough bandwidth to allocate 1MBps to each volunteer making browser based calls.

Further resources for volunteer-led phone banks

Tools: Phone banking platforms

- CallHub (International)
- Hubdialer (U.S.)
- LiveVox (International)

Phone banking guides

- What is a predictive dialer?
- Automated Vs Manual phone banking

Great phone banking tutorial video from DemLabs:

- Improve Your Phone Banking Skills

Attribution

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Section 3.

New Tools and how to use them

Progressive campaigners and organizers have always been ready and willing to adapt existing tools that could help them reach out to people and help build collective power. The tools, as well as their creators, may be part of the problem but while the upside of reaching and organizing large numbers of people inexpensively remains, then groups will be taking advantage of it with the knowledge that tactics and platforms constantly need to be revised and re-evaluated.

New Tools and how to use them

Guide Summaries: Click on titles to go directly to the guides

A/B TESTING FOR SENDOUTS

We don't always know which specific message is the most effective at conveying a complex campaign. The idea of A/B testing—honing a message through repeated testing around communications online—is not only a way of optimizing a message, but also a technique for active listening and making sure of alignment with the interests of a supporter base. Most of this guide focuses on testing email communications, but you can also test web page formats and social media responses.

APPS AND DIGITAL TOOLS FOR ORGANIZERS ROUNDUP

This Tools Roundup is a deep dive into the best new digital tools for organizers. The best tools and systems listed here should be relatively inexpensive, in the sense that they can rapidly be set up and deployed to support programs, and accessible, in the sense that they are user-friendly or based on platforms that supporters and organizers already use and therefore do not require special training or a long adaptation period.

USING FACEBOOK GROUPS FOR ORGANIZING

While Facebook has come under a lot of criticism lately for its leaking of user data and its complicity in right-wing voter persuasion, dissemination of fake news… and the list goes on… it remains a social network that large segments of the population use daily and therefore cannot be dismissed as an organizing tool. This guide focuses on how to make Facebook an important part of an organizer's toolkit for groups needing to reach out and build their base and mobilize people to come out to events.

WHATSAPP USES FOR CAMPAIGNING

WhatsApp is a mobile application used for one-to-one, group, or broadcast messaging. It is free, encrypted end-to-end, and is one of the most widely used mobile apps in the world. It is also owned by Facebook. This guide focuses on how WhatsApp can be used for communication between campaigners, as platform for supporter community building, as a way to activate distributed networks and a channel for crowdsourced knowledge.

A/B TESTING FOR SENDOUTS

Summary of: A/B Testing

A/B testing involves testing campaign communications online with your supporters. Most of the guide focuses on testing email communications, but you can also test web page formats and social media responses. The idea is to make a change and try two approaches (A/B) in order to measure, through response statistics, which approach gets the most uptake from audiences. It can be seen as a way of optimizing campaign communications but is also viewed as a form of active listening for many groups who want to campaign in ways that are better aligned with the interests of their supporter base.

Who's doing A/B Testing for sendouts well?

A/B testing has a long history in direct mail fundraising long before digital. However, running such tests through the mail was slow and costly so it had a pretty small niche. In the digital age, advocacy networks like members of the OPEN network, Sumofus and Avaaz refined and perfected this approach using petition-based platforms but now basically any advocacy group these days with big digital contact lists has worked some principles of testing into their practices.

Why do A/B Testing?

- More impact
  - Leads to more people signing petitions, donating, calling, sharing

- Supporter-focused
  - Learn what messages resonate with your audience
  - Looks at real behaviour, not what people say would work with them (e.g. in surveys)

- Better decision making
  - Helps set goals and identify metrics that clarify success
  - Use of real-world data and behaviour that doesn't rely on perceptions or guesses on what *might* work
  - Avoids potential lost opportunities (opportunity cost) of doing one thing over another

- It's easy
  - Lots of tools that make this easier than ever
  - Learning is fun!

3 reasons to test

1) You're looking for an **immediate result** from a specific email so you can take on board learnings today. This is what is more commonly thought of in A/B testing, for example trying 2 email subject lines with a small group and sending the most popular to the whole list.
2) You want to **test something longer term**. This could be messaging, long term test - concepts or framings (e.g. human rights vs economic angle). This way you could take in learnings from a series of emails to inform a whole campaign.
3) You're looking to **test whole journeys**, e.g. 5 emails leading up to becoming an activist. You could set asks and frame them in a different way to see which approach works best in 5 emails over 6 months.

When A/B Testing might not work for you

If your organization is not willing to implement changes to campaign design and communications based on input from your supporter base, then you should not bother testing in the first place.

Also, if there no real organizational link between the person responsible for running tests and those responsible for creating campaign communications, then the testing will also be pretty much a waste of time.

If you only have a small list only more radical tests are likely to work for you - where you change bigger things. Ideally to test small differences, you'd want to trial each change with at least 5k people, then send the winner wider. If you only have an email list of 7k only more radical testing is likely to be useful, where you change lots of things. It won't be statistically significant, but it could give you indicative learnings about how your list responds.

Finally, if you don't have the capacity to easily message your members or track their interactions with you digitally, then testing would be hard to deploy.

Principles of A/B Testing

The theory behind testing

1. **Test early:** We often use data *after* running a campaign in order to understand impact, but it's even better to use data to make campaign decisions along the way.

2. **Test often:** Set a goal to consider the potential of testing something, no matter how small, in every email you send. But only do this when appropriate! Occasionally testing is a waste of time - for example if you're emailing a small list of people about a one off event that won't inform anything in future there's no or be worth it.

3. **Report back results to your team** and if the results are inconclusive, try it again next time. You'll be surprised how easy it is to get hooked!

Even inconclusive results can be valuable - if there's no difference in response rates between a highly designed email with pictures to something more stripped back, for example, this tells you it isn't worth putting in extra time.

4. **Data-informed, not data-driven:** While "24 hours to save the world's saddest dolphin" may be the winning subject line, it's probably not the kind of brand your organization wants to project. Use data to inform your decisions but remember that data only tells half the story. Don't use data to replace instinct and qualitative feedback from your supporters.

What A/B Testing requires

Tracking tools:

A/B testing usually requires access to digital response statistics. Most CRMs - Constituent Relationship Management platforms that manage member databases and comms (+ if you want a more detailed CRM definition click here) - ex. of some popular advocacy offerings include Action Network + Engaging Networks - come with emailer tools with built-in statistics dashboards for tracking email sendout performance and also have built-in A/B testing functions.

All encompassing testing-support software for website landing pages (the pages you're directing people to via email or elsewhere), such as Optimizely.com comes at a cost considered pricey by some groups (nonprofit rates exist) but can make the whole testing process a lot simpler and easier to manage, especially if it runs on several platforms.

Beyond or without platforms, A/B testing can be done through Google Analytics for website optimizations or through affordable email sendout software options such as Mailchimp (all email sendout software should do this really. It's worth changing your provider if it doesn't).

Social media content and promotions testing can be done through the statistics dashboards of most paid promotions and Facebook's Insights portal for Pages. For more advanced tracking of social media engagement, paid analytics options such as Social Bakers are available for $120/mth.

Staff and culture

As important, if not more important than tracking tools, It's essential to have a culture where testing and failing, is ok. Lots of organizations are ok to test a new idea, but when it fails, they use it as an excuse to not test again.

In some organizations, testing becomes the sole domain of the digital department but for testing to work strategically, staff at all levels need to be involved. Ideally, staff involved in creating the content and the strategy behind it should be involved in the tracking the test.

New habits and practices need to be built around test management as well. For example, test results should be brought up in weekly meetings with staff at different levels of content and strategy involved. This way, the knowledge (value) gained from constant testing will reach throughout the organization.

Time

A quick A/B test on a planned message can take as little as 30 seconds to set up - for example if you're testing 2 different email subject lines with a send in Mailchimp, and you're just not sure which subject line works better.

Obviously, more involved testing projects, such as an audience consulting/listening exercise would be more time consuming.

Setup + stages for A/B Testing for sendouts

The first step is to figure out what you want to find out, what success looks like, and how you're going to measure it.

Developing a hypothesis

Before each test you run, you need to run through this process to develop a hypothesis you're planning to test (remember high school science? Same kinda deal).

1. **Goal**

Start with the ultimate goal you're trying to achieve. e.g. We want to raise more money.

2. Big question

Break the goal down into a single big question – usually a 'What/where/why?' question. e.g. What channel is driving most of our online donations right now? (for the sake of this example, I'm going to say email).

3. Medium-sized questions

Break the big question down into smaller questions. You're trying to figure out the behaviour of your donors and supporters, so these will typically be 'how?' questions. e.g. How are donors able to access our donate page from our email channel? (Sample answer: by clicking a link in the email).

4. Smaller questions

You're nearly there – these are the questions you're hoping to answer with your experiment, and will typically be in the form of 'is/does?'. e.g. Does sending an email with a button link in it lead to more donations than an email with a text link?

5. Hypothesis

This is your time to turn that question into a statement. You absolutely have to be able to answer it with 'true' or 'false'. e.g. Sending an email with a button link in it leads to more donations than an email with a text link (I can answer true or false to this! So we're good to go). You've identified the variables you're going to test - the things you will change - in the example comparing a text link with a button link to donate.

6. Metrics

So you've got your hypothesis! Now figure out what metrics you're going to use to test it out – this is absolutely crucial, and I'd suggest this is the time you talk to your tech and data people to make sure you can actually measure what you want.

For the example above, I'd look at primarily measuring this:
Total amount donated
But I'd *also* be keeping on eye on this stuff:
Total number of donations
Average donation (Total amount donated/number of donations)

So the good news here is that you now actually know what you want to test and how you'll measure it. The bad news is you've still gotta design and assess your experiment.

Setting variables to track

When testing, only test one variable at a time so you're comparing apples to apples. Here are some ideas to help you get started:

Testing	Metric	Platform	What's needed
Subject lines	Opens	Emailer / CRM (member database software) sendout tool	Email set up, duplication, and sending
Best email content	Actions (not clicks – clicks don't necessarily equal more actions)	Emailer / CRM (member database software) sendout tool	Email set up, duplication, and sending Action page set-up and duplication
Page content	Engagement Conversions	Web page	Action page set-up and modification
Page views	Clicks via email	Web page	Action page set-up
Social media content	Engagement	Social media accounts	A Facebook page analytics account or instagram, snapchat twitter stats dashboard
"Growthiness"	New members	CRM (member database software), email signup lists	Checking an action's stats page (for New Activists)
Sentiment	Feedback	Social media accounts, survey forms, email	Monitoring the info@ / general inbox Monitoring social media channels Survey/form set up

Making sure you can access your data

If you don't have a one-top dashboard for tracking test data, as is usually included in a CRM, consider create a spreadsheet that compiles different data sources and results.

This will be essential for providing an 'at a glance' picture of results for team meetings and for tracking your overall approach.

You should also consider, and note in your spreadsheet, when you will be collecting that data. If putting results in from 1 email 2 hours after sending and then another email 10 days after it went out because you went on holiday, the two won't be comparable. To have comparable results you need to be strict on gathering them at the same time. If it's a long term test you may want to always look 3 days after sending an email - if it's an immediate test, like choosing the best subject line to send to a big email list, you'll want to look after a few hours.

Proper sample size

According to statistical norms around statistical significance, the general rule is: The bigger the sample, the more reliable the results.

You're going to need to make sure you have a sample size big enough that you can draw conclusions with. The rule of thumb used in the industry is that 5k for each variable in an email is a good number.

However, a lot of smaller groups that want to get into testing may have email lists that total 5K or less. If test sendouts go out to segments that are portions lower than 5k, testing can still be useful to organizations provided that they run a series of tests over time and consider the trends they are seeing when viewing the results as a whole. In this case, it may take more time to extract useful messaging data but it will prove to be a valuable listening exercise nonetheless.

See also this A/B Significance Test calculator: It tells you whether your A/B test is statistically significant and is useful for being confident that the changes you make will improve conversions.

Metrics that matter vs. "vanity metrics"

When running A/B tests, it may be tempting and most simple to track easily accessible statistics (email opens, website visits, "likes" on social media posts etc.) but these often do not generate the kinds of conclusions that can inform campaign strategy in any significant way.

To involve all levels of an organization in a conversation around testing, it's important to be testing on statistics that clearly point out risks or benefits on issues of strategic significance to the org.

This is where the issues of "vanity metrics" vs. strategically significant metrics comes into play. While superficial metrics like opens, clicks and even list growth are easy to gather, they speak less to others than metrics more closely tied to desired outcomes, such as deeper member engagement and a bigger and more committed donor base, for example.

To go deeper here, Mobilisation Lab and Citizen Engagement Lab put out a great report titled: Beyond Vanity Metrics in 2015 (download here).
One interesting example coming out of the report above is Sumofus.org and their choice to measure MeRA (Members Returning for Action) as the number of existing Members Returning for Action on a monthly and quarterly basis.

Repeat testing

Best practice is running an experiment three times before making it your standard practice and testing something else. There could be a million reasons it worked once and not again – the Obama campaign famously saw a huge rise in donations through highlighting sections of text… that quickly wore off when they tested it again.
Don't get complacent - you are never done testing! Things can always change. It is worth coming back to testing things months down the line. Do learn and respond but times to send emails or preferred phrases can be fickle. Using capital letters and the word urgent in a subject line will increase opens, but if you do it too many times could have the reverse effect. Always revisit your assumptions.

Expanding the testing universe

If it looks good to a small universe, run the experiment again to a bigger audience before you go whole hog. It's a way of re-running the experiment, but getting a stronger result.

Leaving time for actions/responses

Give an email at least an hour - if you have a large list of 800-900k emails, you should have some useful results in this time. Even without having statistical significance, you'll likely see a trend that indicates a difference between the testing groups or not. The smaller your list, the longer it will take to gather statistically-significant data - if it's very small this may not be possible (see above for a stat significance checking tool) to collect data and make sure to track whether or not your predictions were accurate.

Analyzing your data

Action rate: This is the metric many org with large lists use to judge an email's performance. It's better than click rate – through the action rate, you can see how many people were driven to take action, but you can also figure out pretty quickly where in the chain something is going wrong if your email performs badly. If your click rate is high and your action rate is low, it usually means something's up with your landing page.

Amount donated (if it's a fundraising email):

It's up to you whether you choose to look at average donation or total amount donated, but this can help you see if your email is inspiring people to give a higher or lower gift than normal.

Unsubscribe rate
Establish a baseline unsubscribe rate and just keep an eye on it. Unsubscribes aren't always bad anyway [link] but if they suddenly spike, you should definitely look into why.

A quick note on open rates
Open rates tell you how many people have opened an email, but a better indication of email performance is the percentage of the people who have opened it who have clicked a link and gone on to take action. Generally, look at open rates if your email is deeply underperforming – it could be an indicator of deliverability issues.

Otherwise, just keep your focus on the action rate - unless the open rate is key to what you're testing (e.g. if you're sending a newsletter to update people and don't want them to do anything else).

Keep track of your experiments

Keep track of your experiments, and share the findings with everyone on your team. Everyone works differently here, but keep some sort of testing spreadsheet, writing up the results, and ritually sending around new results and talking about them in meetings is a good way to share your testing wisdom.

Re-test your best practices

Every so often, go back and test something out again. You could be surprised.

Further resources for A/B Testing

Online tools:

- A/B Significance Test calculator: Tells you whether your A/B test is statistically significant and is useful for being confident that the changes you make will improve conversions (but it can be expensive to reach statistical significant size and it isn't always worth it. Some data can be more useful than no data).

- Jon Lloyd provides an experiment checklist that you can download and physically check off as you're running your tests. (downloads here as a pdf)

- Optimizely.com is a platform for tracking A/B testing experiments, they have nonprofit pricing plans but are still considered expensive.

- Social Bakers is a social media performance tracking tool that measure the rates of engagement with posts on all of the major platforms. Basic pricing to track 5 different accounts is $120 USD/mth

Reports:
- Beyond Vanity Metrics**:** Great 2015 exploration of groups seeking better metrics to test by Mobilisation Lab and Citizen Engagement Lab

Books:
- The Moveon Effect (2012) and the more recent Analytic Activism (2016) by David Karpf both explore the "culture of testing" as developed by digital-first campaigning groups and also how these practices have affected the larger advocacy sector in the U.S.

Attribution

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TOOLS ROUNDUP:

APPS AND DIGITAL PLATFORMS FOR ORGANIZERS

Overview and principles for best Apps and digital tools

Modern organizing and campaigning is far from being a “digital-only” affair and while offline gatherings, election-based activities and group work may well happen offline, digital tools and platforms are often the vital thread that makes organizing large groups of people in networks possible without an army of staff or volunteers. Behind many of the leading new campaigns and movements, a set of digital tools and platforms are the glue that keep it all working together.

Overall, the best tools and systems that support organizing work should be relatively inexpensive, “plug and play” – in the sense that they can rapidly be set up and deployed to support programs – and accessible in the sense that they are user-friendly or based on platforms that supporters and organizers already use and therefore do not require special training or a long adaptation period.

The values and ethics of digital tool selection

When selecting the tools you want to use for your campaign, take a few minutes to consider and weigh the ethics and values of the companies making the tools and the security of your lists and data in that process.

Although many of these tools are inexpensive, every penny spent on technology influences the technology being developed and the values they develop those tools with. Many of the companies in list are non-profit, progressive aligned companies, but others are for profit companies that might not align with your values or might sell their tools to your opponents. This list provides a general overview of many tools that are available and various price points, but it's worth considering issues like the Trump campaign’s use of NationBuilder for the 2016 election, the security and data practices of Google and Facebook, and others when you select your tools.

If you’re keeping confidential information, be sure to read up on our **recommended digital security practices**.

And, if you’re working with communities with limited technology or multilingual audiences, some of these tools might not work or be built for those functions. Famously, many text tools don’t allow for accent marks. So, be sure and test out the tools to see what works best not only in the short-term --- but also for your long-term vision of the type of campaign and community you’re trying to build.

Recommended tools and apps for organizers

The recommendations presented below are a mashup of advice from different sources.

They come partly from a NetChange Consulting's compilation of tools and platforms used by leading organizations that run distributed organizing systems including: The ACLU's People Power program, 350.org, Indivisible, Movimiento Cosecha, the Bernie campaign, Canada's Dogwood Initiative, Sierra Club, Hollaback!, Team Internet – Free Press and the Stop Adani network in Australia.

This is combined with Stuart Melvin's recommendations of top apps for organizers, which expands on the utility of some of the solutions presented.

Finally, this roundup also integrates suggestions from our Blueprints helpers and our audience. Suggestions are still being gathered through this input form here.

Recruiting folks, building lists, managing + contacting supporters

Engage with your full base and leads with CRMs (client relationship management software) with email capacity like Action Network or Nation Builder (especially these two because they allow for distributed control) though some groups prefer Action Kit and others use tools more formatted for marketing like HubSpot. Mailchimp is a free or low-cost option if all you need to do is manage email lists, and CiviCRM works well if you've got a bit of coding experience.

Focus on: **Action Network**

Shortly after Trump was elected, women and allies took to the streets in their millions. This global Women's March was organised using Action Network. The free version combines digital "actions" (petitions, sign up forms, events, fundraisers) with a simple but effective database and mass-email tool. Got some cash? It's well worth the $200 pcm to become a network partner, giving your sub groups all the same tools, while the supporters they engage automatically join your main database. The non-profit and progressive-only Action Network is now the movement standard, powering everything from the School Cuts campaign to Extinction Rebellion and Friends of the Earth. Action Network are also about to launch a new mobile tool for face-to-face, 1:1 relational organising which you can check out here.

Generating signup pages/action sites

Campaign CRMs (client relationship management software) with mailers as mentioned above. Create signup forms and actions in Facebook groups and Facebook Messenger.

Blast your list with SMS short code systems like TextMarks and Mobile Commons, and sometimes paper to digital signup process at public events later transferred to digital spreadsheets, like Google forms.

Use microsites either hosted independently or signup pages generated by CRM tools like Action Network + Nation Builder or using drag and drop page builders like Wix, Squarespace or Weebly with embedded forms.

Serving low-barrier digital actions / identifying high-action takers

Hosted online petitions like ControlShiftLabs, action tool suites like New/Mode, built-in action tools within CRMs like Nation Builder/ Action Network etc., Peer to peer texting systems like Hustle, ThruText (previously known as Relay) and Spoke. Phone-banking tools like CallHub, HubDialer and ThruTalk (previously known as Relay Dialer). Relational organizing tools like VoterCircle for peer to peer outreach.

Internal comms / coordination within the network of supporters

Slack, (or Keybase if security + encryption are a concern) WhatsApp (See our guide on this) , Facebook Groups (see our guide on this), Trello or Asana for mapping out groups tasks, Loomio (a tool for taking collective decisions without having to organise meetings / conference calls) For video conferencing, most often Zoom, Maestro conference or Jitsi.

Focus on: **Meistertask**
(Browser, iOS, Android)

So you had a meeting and saved your minutes in Drive, now you need to assign to do's to each other. Like Trello, Meistertask is a free task management platform, with Tasks ("Cards" in Trello) created in Projects (like Trello's "Boards") that are laid out like a series of lists. While most similar platforms limit the number of free users, both Trello and Meistertask are unlimited. So why do I prefer Meistertask (especially when its a little more glitchy than Trello)? Unlike Trello, Meistertask forces tasks to be assigned to one responsible person and enables completed tasks to be "ticked off". This kind of accountability is the backbone of organising.

Tip: Prefer "Asana" style lists to "Trello" style boards? Check out https://sendtask.io/ - it's free, enables unlimited users and even enables tasks to be shared with people without an account!

Focus on: **Slack**
(Browser, Windows, Mac, iOS, Android)
Next you need a way to keep in touch in between meetings. Facebook is ok, but not everyone wants to be on it. Email can be overwhelming. Whatsapp is great for quick

back n forth in small groups or broadcasting. But to enable more scalable inter and intra-team chat, Slack is the go to. While new alternatives like Zulip are better in some ways (e.g. using message "topics" like email subject lines, making it easier to keep up with the chat) Slack's new ability to generate a permanent invite link and it's ecosystem of bots, apps and tutorials, make onboarding easy - vital to reach scale

Managing info within the network

Get organized and consistent with tools like Google docs / sheets, Air Table and Basecamp.

Focus on: **Google Drive**
(Browser, Windows, Mac, iOS, Android)

Before anything else, you're going to need someplace to store, share and collaborate on minutes, strategies and other documents. Google Drive is your answer. Open to all and easy to use, Google Drive has helped scale movements from Indivisible to Extinction Rebellion.

Campaign design planning + mapping

Mural (a brainstorming and remote collaboration tool based on design thinking), Kumu (a data visualisation tool designed for problem analysis and stakeholder mapping).

Focus on: **Plectica**
(Browser)

Life is complex. You might need to develop a "relational map" of the people (and power) in your community or workplace. Or you might need to collaborate with others remotely to brainstorm a complex campaign strategy. Plectica has you covered. This mind mapping tool is based on principles of "systems thinking", helping you work through a holistic view of a complex issue.

Planning / scheduling /managing events

Eventbrite, Facebook Events, Calendly, shared Google calendars.

Focus on: **Doodle**
(Browser, iOS, Android)

The original scheduling app. Organisers need to schedule time to meet and talk to each other and others. Doodle is the answer. You might be familiar with the original tool: create some time/date options, send the link to your invitees, they pick the ones that work for them, enabling you to easily choose a date that works for the majority. But Doodle has a great new feature: "Meet me" enables you to connect your calendar and send a link to your invitee. They can see when you're free and choose a slot that works for them. What's more, Doodle also now lets you run a poll for things other than dates, which can be a good way to take an online vote.

Creating quick and affordable campaign videos

Microsoft FlipGrid allows campaigns to easily gather video testimonies and voices from supporters.

Adobe Spark (a free Adobe product) allows users to edit videos, add captions and text frames and even free background music.

Lumen5 (with a free 1 user option) is another easy-to-use video creation site that offers a vast royalty-free library of stock clips that can come in handy when creating issue-specific videos

All of the above have been tried and tested by several low-budget progressive political campaigns in the U.S. as documented in the Democracy Labs case studies cited in Other resources below.

Other folks recommend Lightworks, VSDC or iMovie for video editing. To add captions and subtitles to videos you've already created: YouTube directly or Movavi.

Free graphics/ logos / visuals & editing

Make free or super cheap visuals with Stencil, Snappa and DesignBold.

Unsplash is recommended as an online resource for royalty free photos.

Focus on: **Canva**
(Browser, iOS, Android)

Making things look sexy is a skill, and with a distributed organising programme you should be able to find graphic designers to help out. But Canva can save you if you can't. A free platform chock full of swish looking templates for logos, flyers, social media images, infographics and the rest. Jump on here and make your cause look lovely.

Other resources

- NetChange Consulting's common elements of a distributed organizing "tech stack". The table presented is a compilation of tools and platforms used by leading organizations that run distributed organizing systems. To download this table as a PDF, click here

- Stuart Melvin's "My top 10 apps for organisers" post on Medium

- Democracy Labs, which supports low-budget progressive political campaigns in the U.S. has documented several use case where affordable video technology helped campaigners deploy effective appeals to their base below:
  - Virginia Candidates Create Issue-Specific Campaign Videos
  - Innovations In Persuasive Storytelling

- ACRONYM's 2019 Digital Organizing Tools Assessment (created to support U.S. progressive political orgs making tool choices)

- Social Movement Technologies offers extensive webinar-based trainings and resources on digital infrastructure needs for progressive groups.
  A good rundown of digital infrastructure for organizers is provided in the following webinar: Top 2019 Tools & Tactics to Bump Up Your Online Organizing Game
  See all of their offerings here: https://courses.socialmovementtechnologies.org.

- Drew Wilson has prepared a collaborative list of Digital Tools for Activism on this GitHub page

Attribution

Input and resources for this guide were provided by:

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USING FACEBOOK GROUPS FOR ORGANIZING

Summary of: Using Facebook Groups for Organizing

While Facebook has come under a lot of criticism lately for its leaking of user data and its complicity in right-wing voter persuasion, dissemination of fake news… and the list goes on… it remains a social network that large segments of the population use daily and therefore cannot be dismissed as an organizing tool. For groups needing to reach out and build their base and mobilize people to come out to events, Facebook remains an important part of an organizer's toolkit.

Given that the conventional ways that organizations have used Facebook to reach out (through a Facebook Page), are generating diminishing reach (since Facebook changed its algorithm), it's important to explore how groups are making tactical use of the network through the platform's Groups option.

Who's using Facebook Groups for organizing well?

Almost all of the thousands of Indivisible groups across the U.S. use Facebook Groups for organizing. ACORN UK also makes use of them as a complement to their on the ground community organizing. Smaller groups organizing against racism, such as the Coalition Against White Supremacy and Islamophobia in Toronto, and Overt Bigotry Response also use Groups.

Why should you use Facebook Groups for organizing?

One of the big returns of using Facebook Groups, vs. Pages, is that it helps campaigners get around the changes to Facebook's algorithm, which now offers very low reach to Page followers unless paid advertising is used. See point 6 in this article for a brief explanation.

In terms of pure organizing benefits, using Facebook groups allows campaigners to:

- Recruit new supporters by reaching out where people naturally spend their time
- Establish a channel for rapid sharing daily/weekly actions and wins
- Efficient setup and management of events via Facebook Calendar
- Rapid member communication via groups and/or Facebook Messenger

When using Facebook Groups for organizing wont work

Privacy and security issues

If privacy is a BIG issue given your campaigning context (see guide on digital security) then think twice before using Facebook.

Members with privacy concerns may not feel safe joining public discussions. In some areas, group members hesitate to use Facebook for fear of retribution by employers, local police or trolls who may see their Facebook activities.

If you want all members to be able to weigh in, consider using other channels.

If group work is your main activity...

On Facebook, conversations tend to be cluttered and scroll off the screen quickly. For group coordination or planning, use a limited-membership mailing list or a collaboration tool like Slack.

What using Facebook Groups for organizing requires

Staff that can use their personal Facebook accounts to set up a group and moderate it

- One person with a personal Facebook account needs to initiate a Group and serve as the Admin
- Ideally, a few people should share the ongoing posting and moderation duties

Setup + stages for using Facebook Groups for organizing

Choosing the right group option and activating your group

- **Closed Facebook groups** can be found by search engines but they hide much of the group's information, including posts, events, files and photos. However, the group's member roster is visible. Members can post anything they want in the group without their friends and families seeing it. Closed groups are great for recruiting and for member communication and coordination. However, closed groups are poor for outreach because events and other information cannot be shared outside the group.

- **Secret Facebook groups** cannot be found by search engines or by searching on Facebook and give an extra layer of privacy. The member roster, posts, photos and all other group information is completely private and only visible to members. This makes secret groups a good choice for groups that need extra security or for team leads to coordinate.

- **Public Facebook groups** are easy to find and join, but members' identities and posts are not protected at all, making it a poor choice for Indivisible groups. For example, when a member posts something to an open group it may be automatically shared with their friends and family on Facebook, potentially alienating those who don't share their beliefs.

- **Consider a multi-group strategy.** Many Indivisible groups have multiple Facebook groups for different purposes. The most popular strategy is to create a Facebook page for outreach and a closed Facebook group for members. Another approach is to create a closed Facebook group for members and a secret Facebook group for leadership. These are good strategies for groups that embrace Facebook but do not want to deal with other, less mainstream solutions like Slack. Keep in mind that managing multiple Facebook groups will require more dedicated Facebook admins, and will make some tasks more complicated, like posting the same event or action in multiple groups.

Set up a group admin team responsible for management

Consistency is the key for groups of all sizes, and having the right team managing your group's Facebook presence is essential. Every group should choose a Facebook admin or admins (using their personal accounts) and set the volume of Facebook activity to a level that can be maintained over time. The admin(s) will be responsible for:

- Updating page/group info
- Publishing content
- Managing the calendar
- Moderating group content
- Vetting member requests

Vet New Members

It is vital that you vet requests to join your Facebook group. You may not want information shared within your closed Facebook group to be distributed externally and you certainly want to avoid internet trolls that seek to harass and bully people online. In some cases, exposing your group to a malicious outsider can even be a safety issue.

Here are some strategies for vetting people who request to join:

- Know them. Only let people in who you or another member knows personally.
- Meet them. Only allow people to join after they have attended a local meeting.
- Make sure they're local. Many groups want to keep membership restricted to their city, district, or region. Ask applicants for their city or zip code and redirect them to other local groups if necessary.
- Ground rules. Post the criteria for joining the group and a Code of Conduct or Posting Guidelines (see below under Facebook Etiquette).
    - Note: You can make accepting the Ground rules a prerequisite to joining a group. As in, users must answer question fields when they select "request to join". The answers are then given to mods to approve/disapprove

Maintain High Quality Posts & Post Regularly

Group admins are responsible for creating and editing group posts and events, and making sure they are high-impact and capture the attention of members.

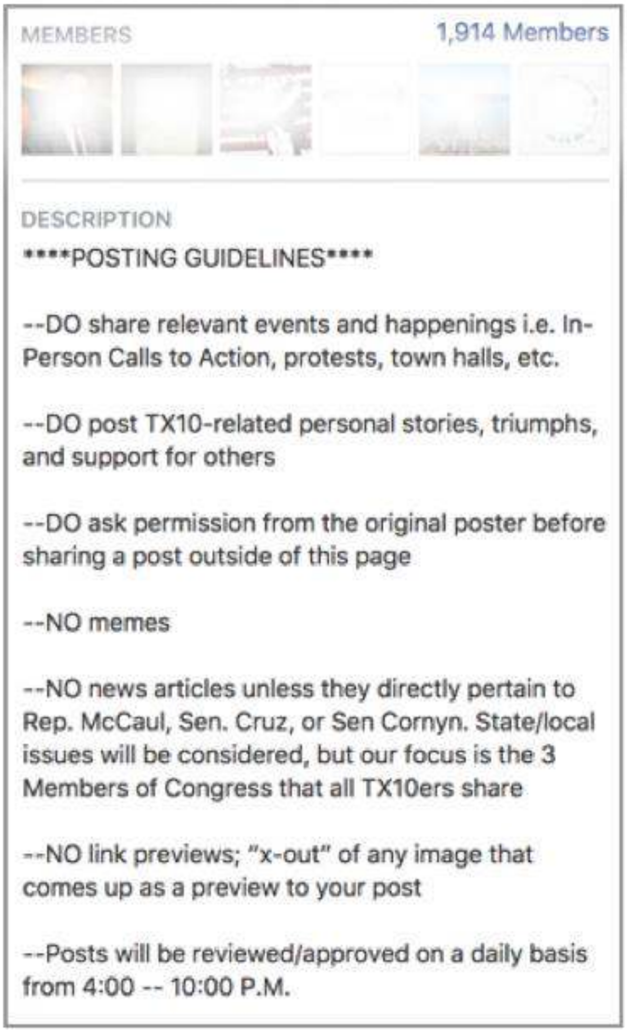
- **Facebook Etiquette** / **Code of Conduct** (see further below for sample image). Clearly state the type of information that your group should and should not post. For example, many groups instruct members not to post fake news, not to vent, not to "go low," and sometimes even not to post mainstream news articles. Trigger warnings and content warnings have become super commonplace in feminist/anti-racist community organizing groups

- **Include photos or images in posts whenever possible** because they are statistically more engaging and Facebook's algorithm values them higher, which means more people will see them. Photos are great but you can also create custom images with text and graphics with a simple design tool such as Canva.

- **Videos get the most views and engagement.** Some groups have found that they get the most engagement by creating short action videos, like a 15-second clip of people speaking out in response to a local elected official's question or position on a topic. Facebook's algorithm promotes video and Facebook Live above all other forms of content. If possible, include subtitles in your posting since many users view Facebook videos with audio turned off. Try to upload the video files to Facebook rather than posting a link to the video on another platform, like YouTube. Facebook prioritizes natively-uploaded videos rather than links to videos on other sites.

- **Post daily.** Post at least one new thing per day to keep things fresh and active. It is essential to be consistent. Facebook's algorithm rewards consistent engagement—the more your members like, share, and click on your posts, the more they will be seen.

- **Be relevant.** Above all else, post items that your members will love. Celebrate your successes and actions.Connect emotionally with your members and they will engage.


MEMBERS 1,914 Members

DESCRIPTION

****POSTING GUIDELINES****

--DO share relevant events and happenings i.e. In-Person Calls to Action, protests, town halls, etc.

--DO post TX10-related personal stories, triumphs, and support for others

--DO ask permission from the original poster before sharing a post outside of this page

--NO memes

--NO news articles unless they directly pertain to Rep. McCaul, Sen. Cruz, or Sen Cornyn. State/local issues will be considered, but our focus is the 3 Members of Congress that all TX10ers share

--NO link previews; "x-out" of any image that comes up as a preview to your post

--Posts will be reviewed/approved on a daily basis from 4:00 -- 10:00 P.M.

Sample code of conduct above from an Indivisible Facebook group

Post Clear Calls to Action (CTAs)

- **CTAs lead to action**. Ideally your posts will ask your members to act. Sharing information is good; inspiring action is better. This is just like when you call your elected officials —voicing an opinion is good but presenting an "ask" is better.
- **Make CTAs stand out.** Make sure your CTAs are always extremely obvious and clearly visible. For example, use simple text formatting: "CALL TO ACTION: …" or "TO DO: …" If possible, create a standard visual treatment (graphic) for "Action" or "Let's Show Up" requests so they stand out from everything else.

- **Place important info at the top.** Put the time, location, the action requested and other important details at the very top of the post so it won't get clipped (Facebook only shows a couple lines of text by default).

- **Keep to a schedule.** Many groups post CTAs once a week, like on Sunday, and post additional "red alert" CTAs as needed. Other larger, more active groups may post daily actions.

(Example from Indivisible) Including a punchy image with a call to action like this event can go a long way in making it stand out in members' feeds.

(Example from Indivisible) A photo action is an easy way to involve many group members, showcasing the group's solidarity and amplifying its message.

Small Facebook Group Management Best Practices

These recommendations apply to Facebook groups with less than 100 active members.

- **Group Admins**. Appoint at least one group admin to manage the group's Facebook account (using their personal accounts).

- **Always have a backup**. Make sure someone else has account access and can run the group in the absence of the main Facebook admin. Some groups have been devastated when a group admin unexpectedly lost contact with the group without transferring the account.

Tactics for Making Sure Members (and Others) See Posts

Facebook uses a complex, ever-changing algorithm to determine which posts each user sees, and how high up they are on their feed, and when they get sent out. You can use some simple tactics to increase how often your posts are seen.

- **Add comments to posts/ Sharing your posts.** Encourage members to leave a comment on CTAs ("done" or "called"), events or other important posts, or share the post itself. The Facebook algorithm will see the activity, assume it must be an interesting post, and then send it to more people.

- **Cutting & pasting posts.** Some groups instruct members to cut and paste posts and repost them. This makes it much more likely that members' friends who don't follow your group will see them.

- **Remind members to visit the group's page.** The group's page contains time-sensitive information about events and actions that may get lost on members' feeds. Actively encourage members to check back regularly with the group's page.

- **When it's really urgent, don't rely on Facebook.** The tactics above will increase your success rate, but you can never reach everyone—and even if you do, they won't see your post until the next time they happen to check Facebook. For rare, truly urgent messages, you still need a mailing list or another communications solution.

Large Facebook Group Management Best Practices

These recommendations apply to Facebook groups with more than 100 active members.

- **Group Admins, Editors & Moderators**. At a minimum, have 3-5 people to manage the group's Facebook Group:
    - 1-2 people managing publishing and moderating the group
    - 1-2 people vetting new recruits
    - 1 person managing the group's calendar
    - To learn more about the differences between Facebook admins, editors and moderators, see the Facebook tutorial: Facebook roles and permissions.

- **Control posting**. Limit members' ability to post items and/or create an approval workflow involving admins approving new posts. For very large groups, only allow admins to post to prevent "flooding." When a group is "flooded" with messages, Facebook does not always show posts in members' feeds which may prevent important posts from being seen.

- **Heavy moderation**. Larger groups are more in need of heavy moderation to shut down the spread of fake news, bickering and other negative online behaviors. Moderators play an important role in keeping conversations friendly and should immediately intervene when people start arguing, imposing "purity tests," or other negative interactions. For groups leading discussions on sensitive topics, some choose to set all comments to "require approval" by a moderator to keep the space safe for its users.

- **Editorial calendar**. Some large groups find it useful to set up an editorial calendar to organize and optimize what posts go out when.

- **Get another event management / calendar tool**. You can only send event invites to all members of your Facebook group if it has less than 250 members. Otherwise, it will only send the invite to members who are your friends (you can manually add more individual names but this is impractical). When your group grows above 250, consider using a more robust calendaring tool like Google Calendar or Eventbrite.

Address Privacy Concerns Proactively

- **Privacy ground rules**. Clearly state the group's privacy rules in the group's information page and have moderators make sure members do not share each others' personal information or share each other's posts without permission.

- **Remind members about privacy, even if your group is secret.** Moderators should remind group members periodically that no matter how "private" or "secret" their group is, they should be careful of what they post.
  - *Example:* We treat Facebook as more-or-less private, but nothing is ever 100% secure, and being political activists makes us more of a target than the average person. So, as a personal rule, please "assume it will leak and be on the front page of the New York Times."

- **Educate members**. Encourage members to learn about Facebook's privacy settings and adjust them. Facebook Tutorial: Facebook Privacy Checkup.

The Tricky parts of using Facebook Groups for organizing, and some fixes

Your members could miss important posts.

You cannot guarantee that a post on Facebook will be seen by all your members! Even those who use it constantly will miss posts because of how Facebook's feed works. For critical communications that you want delivered promptly to every member of your group, use an email list.

Attribution

Input and resources for this framework were provided by:

Primary content for this guide was provided by Aram Fischer with the Indivisible Digital Toolkit Project - For more information about this effort, contact them at indivisible.toolkit@gmail.com. Thanks also to Nick Ballard of ACORN UK and Sarah Ali who contributed their experience.

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WHATSAPP USES FOR CAMPAIGNING

Summary of: Using WhatsApp for campaigns

WhatsApp is a mobile application used for one-to-one, group, or broadcast messaging. It is free, encrypted end-to-end, and is one of the most widely used mobile apps in the world, with over 4.93 billion active users in 2018.

In advocacy and movement building, WhatsApp can be used for communication between campaigners, a platform for supporter community building, a way to activate distributed networks and a channel for crowdsourced knowledge.

Who's using WhatsApp for campaigns well?

Organizers under risk of surveillance like Palestine-based Youth Against Settlements, South Asian community organizers Jakara Movement, undocumented immigrant rights activists Movimiento Cosecha, Brazilian anti-police brutality activists Meu Rio, Amnesty India, in order to engage and mobilise its supporters and activists across the country, the El Avispero movement in Colombia to mobilise activists around the peace accords and related issues, and many more….

Why use WhatsApp for campaigns?

A Free Global Channel

Whatsapp is a global distribution channel with 4.93 billion active users, predicted to rise to 5.07 by 2019, with high usage in the Global South. WhatsApp has become the most widely used smartphone application in a number of countries, including India (where is has 200 million monthly active users), Argentina, Brazil, Mexico, Italy and Spain.

It has become popular worldwide because it is mobile-based, uses little data (under 2kb per message) and is logistically simple. That means you can be distributing campaign content and internal organizing material anywhere in the world without being reliant on mobile service providers or expensive data plans. Many mobile service providers offer unlimited access to WhatsApp with their plans, meaning that users do not have to depend on having data active on their phones to be able to use the app.

As global online campaign communities grow and flourish, we are learning that ease and accessibility are some of the biggest factors in the adoption of digital tools. While access to a desktop computer can be limited based on region, there are almost as many cell-phone subscriptions (6.8 billion) as there are people on earth.

End-to-end encryption

Although it is not quite at the same level of digital security as alternative messaging service Signal, WhatsApp still offers end-to-end encryption on all messages, chats and calls meaning that it is a superior option for secure messaging when compared to the likes of Facebook Messenger, Slack or SMS.

Diverse Content Types

The basic functionalities of Whatsapp make it easy to share and broadcast multiple types of content. The Whatsapp platform can easily be used to transmit real-time text, document, image, audio, video content, and location data. The core value of Whatsapp for content sharing is that it does all of this for free. Unbranded or lightly branded content seems to travel the furthest.

Message Overlap

Users tend to belong to multiple groups, so they often get exposed to the same messages repeatedly. This can be less work for an organization because you only need to create content and distribute to influencers.

Open Rates

Real-time content distribution, with open rates way higher than email. In fact, mobile text-based messages have an average open rate of 98 percent. This makes Whatsapp an ideal channel to share content and engage your audiences.

Easy to Use

Users can remain anonymous, identified only by a phone number. Groups, which are capped at 256 members, are easy to set up by adding the phone numbers of contacts. Whilst this limit of 256 members can be limiting when it comes to communicating with large numbers of people, campaigners have found creative ways of taking communications with groups of people to scale with WhatsApp, which we detail below.

Direct and personal interaction with activists, volunteers and supporters

WhatsApp offers a direct and personal messaging platform for engaging with activists, volunteers and supporters. Campaigners with experience using WhatsApp for their work stress that the most benefits are reaped when it is used as a two-way, interactive communication channel - not just for broadcasting content but for interacting with people interested in supporting a campaign, cause or organization.

When to use WhatsApp for campaigns

Note that the use cases presented below are not mutually exclusive. That is, several groups are running several WhatsApp campaigns simultaneously using these different approaches.

WhatsApp for Media Amplification

Share news that might not make it to global media outlets, especially in conflict zones where media is notoriously difficult to distribute.

This has been used by activists to share news that might not make it to global media outlets, especially in conflict zones where media is notoriously difficult to share

- For example in Syria: Aleppo activists who shared their last stories did so over WhatsApp

- For example in Sudan: Professor Qassim Badri, the dean of the UN-funded al-Ahfad Women's University in Khartoum caught on film assaulting women protesters. The video was instantly shared across hundreds of Whatsapp groups, resulting in a fast chain reaction of sharing that brought the controversy to light.
    - Result: Reached the UN, which subsequently released a statement announcing their withdrawal of all funding and support for al-Ahfad until appropriate measures had been taken by the university administration to address the controversy.

Whatsapp for Direct Action

Amnesty International India organizes some 2,500 volunteers and activists through WhatsApp groups, which serve multiple purposes from raising awareness about new issues or campaigns that the organisation is working on, disseminating campaign materials and petitions, obtaining feedback on campaign materials and tactics and organising direct action. Groups are mainly organized according to geographical location, although the organisation also sets up some campaign-specific groups to plan actions for a particular campaign, such as its Justice for the 1984 Sikh Massacre campaign. The direct and personal nature of WhatsApp has brought the organisation much closer to its volunteers as it is able to interact with them more efficiently and on a much more regular basis.

Other case studies:

- Nuit Debout got thousands of people into the streets in France to protest Macron
- Callout to provide community support and solidarity when a mosque in Toronto was mobbed got hundreds of people out to a downtown mosque within minutes -- Islamophobic protesters forced to leave
- Zimbabwean activists coordinated country-wide protests in 2016
- 6,000 HIV/AID activists on the streets of Durban in South Africa

WhatsApp for Crowdsourcing

Activists use WhatsApp to compile citizen reporting of abuses, including policy brutality.

- For example in Brazil: Meu Rio documenting police brutality

Whatsapp for Underserved Communities

Groups serving cultural and linguistic minorities use Whatsapp to share translated materials around social and government services to serve their communities because: “Google translated pages are often so full of mistakes that they are incomprehensible for most non-Romantic languages,” reports Deep from the Jakara Movement in California.

When NOT to use WhatsApp for campaigns

Do you have time to engage in two-way conversations?

You should be aware that WhatsApp is quite a time-intensive communications platform - because it is a direct messaging service you should expect lots of people to reply to the messages you send them with questions or feedback and they will expect relatively speedy responses from you. If you are unable to continue engaging with these people after sending out messages and materials then they will quickly lose interest in your campaign and WhatsApp will lose its effectiveness. People expect WhatsApp to be a two-way communications platform - If you can’t fulfil this expectation then you may be better off sticking with other mediums, such as email or text messaging

Situations where you might want to stay away from WhatsApp:

- If you’re under police/government surveillance
- If your user base is not using mobile

Setup + stages for using WhatsApp

Deciding how to use WhatsApp

Aside from technical needs (like having a phone or access to the internet), you should begin with an idea of what your objective is. Do you want to use Whatsapp as part of a ladder of engagement? Do you want to use it as a way to communicate with a core organizing group? Do you want to use Whatsapp for large one-way broadcasting, or group conversations? Do you require the ability to moderate or control what content is shared, by whom, and when?

The answer to these questions will determine whether WhatsApp is the right channel for your campaigning, the type of group structure you create, and the audiences you choose to reach.

Step 1: Have a phone number that you can use

You need a phone number that you can use. For smaller scale organizing, a personal phone number can suffice.

Step 2: Have internet access on a mobile device

WhatsApp is a mobile-based channel. There is no standalone desktop or tablet app that can be used without a mobile number and device. In order to download, set up, and share content on WhatsApp, you will need a mobile device, associated with a phone number, with access to the internet.

WhatsApp is compatible with multiple mobile devices and operating systems, including Android, iOS (iPhone), Windows Phone, and Blackberry.

Step 3: Decide on Group Set Up

There are two types of groups you can create within the Whatsapp platform: group chats, and broadcast lists.

Group chats let you have open content sharing between up to 256 phone numbers. This is not a ton of recipients, meaning that as your organizing scales out, you will likely be managing multiple groups. This is great for highly tailored content to specific segments, but without automation and / or a team of volunteers to manage the groups, they can be unwieldy. Group chats are most useful for core organizing groups and local community discussions.

Recipients in group chats will receive all content shared, and are able to contribute content without restriction. Content is received whether or not phone numbers are stored in a recipients contact list.

All recipients are able to see the phone numbers in the group chat, which is a key consideration when deciding to use this type of group set up.

Broadcast lists are saved lists of phone numbers that you can repeatedly sent content to. Content sent to Broadcast Lists are sent to all members of the list, and will appear as a normal message from you in their chats screen. If they reply, it will not be sent to other members. Recipients cannot see other members of the group, as each message appears to be a one-on-one interaction between your broadcast number and the recipient.

It is important to note that recipients *must* have saved your broadcast number to their contact list in order to receive content, so it is vital to include that in your information capture method.

Step 4: Set up a Whatsapp Account

In order to set up your Whatsapp account, you must first install the app on your phone. This can easily be done for free through the Apple App store, or Google Play store.

Once you have installed the app, you must create a 25 character (max) name. You should consider whether you want this to be a personal name, or the name of your organization. The name you choose is *permanent* and cannot be changed. Personal names tend to be more engaging for group chats, while organization names are valuable to establish credibility in broadcast lists.

The name you choose is accompanied by a profile image you upload from your phone. This can be changed at any time and is not required to use the tool.

Once you select a profile picture, write a 139 character (max) status. This can also be changed at any time.

Step 5: Build your audience and get the word out

As a platform without any paid or organic acquisition method, there are two ways to build your audience and get the word out.

1. Give the audience YOUR number, so they can add you

In 2014 the BBC set up an Ebola Crisis broadcast list, sending three health alerts daily. They publicized the following content, and had 25,000 users sign up to receive updates.

> To subscribe, send **'JOIN'** via WhatsApp to **+44 7702 348 651** (you need to save this number in your phone's contacts first)

This method of audience building and getting the word out what effective because it ensured that users added the number to their contact list, and shared their personal phone number with the BBC in their 'JOIN' text message.

Consider adding calls to action to join broadcast lists in your emails, or other communication channels. However, this method requires your audience to do a ton of leg work, and is a high-barrier ask. They have to add your number on Whatsapp AND send you a text. It may be hard to provide value for your audience given this.

2. Acquire your audience's phone numbers and add to YOUR contact list

This second method puts more effort on you and your organization. If you have already integrated phone numbers into your ladder of engagement, have a prebuilt phone list, and are only using group chats, this is an obvious choice.

Capturing phone numbers, and getting recipients onto your list can thus be the biggest challenge for using WhatsApp for campaigning. There is no automated upload feature into the WhatsApp platform, so each number must be added manually to a group chat or broadcast list from a contact list.

Step 6: Set up the actual Group

Like most instant messaging applications, WhatsApp lets you create a group in order to message many people at once. You can create a group in WhatsApp by opening the Chats menu and selecting the "New Group" option for a group chat, or "Broadcast Lists" to create a broadcast list. From there, you'll be able to add up to 256 people to a group as long as they're in your phone's contacts.

If you need to invite people not in your phone contacts, click on "group invite link" to create a shareable link. Keep in mind, though, that messages sent through broadcast lists will only be received by people with your number saved in their contacts. This is a built-in anti-spam feature within the Whatsapp platform.

If you decide to go with WhatsApp groups, a natural way to organise them is by location. This helps to maximise their potential to contribute to organising and mobilisation strategies, whilst also providing more opportunities for members to develop personal relationships with each other.

Once you've set up your groups by location, you can then easily integrate them into your existing supporter / volunteer acquisition and retention processes. For example, once you have the details (phone number and address or hometown) of a new supporter, you can simply send them the link to the respective WhatsApp group for their local area and ask them to join if they would like to get more involved and engage with other volunteers near them.

Step 7: Organize and build power!

Once you have set up your broadcast list or group chat, you are ready to use Whatsapp for content distribution, organizing, and/or amplification.

As previously mentioned, people expect WhatsApp to be a two-way communication channel so if, in this phase, you only use the platform to distribute messages and content then you will find your open & click-through rates will rapidly drop as people will lose interest in your messages. This is particularly true for groups, which can quickly become dormant and decline in numbers if you do not use them for authentic engagement with your supporters (either directly or through volunteer leaders). Fortunately, there are lots of ways you can keep your supporters engaged so they turn out and support you when you need them most! For example, some of the things that Amnesty India regularly sends to their WhatsApp groups are:

- Quizzes and competitions with concrete prizes (e.g. being on the guest list for limited-capacity speaker events or workshops);
- Invites to Facebook live Q&A sessions on specific campaigns (WhatsApp group members can send their questions via their WhatsApp groups beforehand and they are read out and answered during the Facebook live session, which is then sent to all the WhatsApp groups afterwards);
- Requests for ideas on tactics and creative actions for new campaigns;
- Invitations to (in-person) campaign design and planning sessions with staff members (again with limited capacity, giving priority to those who sign up first); and
- Invitations to specific campaigning events or demonstrations (giving WhatsApp group members two times: one earlier time for people who want to help plan and set up the event and another time for those that just want to participate).

The Tricky parts of using WhatsApp for campaigns, and some fixes

Managing large group chats is difficult on WhatsApp

Large WhatsApp groups can easily become unwieldy and very time-consuming to manage. There are two ways to address this problem: The first is to establish clear rules or guidelines for your WhatsApp group. Post these in the group every time a new member is added so that people are reminded of them. For example, Amnesty India's WhatsApp groups have the following rules:

- If you are not happy with the group, let an admin know
- You can unsubscribe at any time
- Keep the discussions related to human rights work and issues.
- Keep it clean and respectful

Secondly, once you start increasing the number of groups you manage then you will soon need support from volunteers who will be recruited as group administrators. These people will be responsible for ensuring that everyone follows the established rules and guidelines, answering questions and generally facilitating / managing the discussions in order to keep the groups active. As staff members, your role will then be communicating with these volunteer leaders (ideally checking-in on a daily basis) to ensure that they have everything they need or need any support (for example, if they were asked a question they didn't know the answer to).

The limit of 256 people to a single group can be a challenge, but one that can usually be quite easily overcome: if you are nearing this limit, just send a message out to the group asking if there are any members that would be willing to leave this group and help set up and/or manage a new one - you will usually find at least one person who is willing to do so!

Can't always control a narrative or a direction in a conversation

Once campaigning content is shared on WhatsApp, be it via WhatsApp groups or broadcast lists, it can be hard to control what then happens to that content as it can be easily altered, adapted and forwarded to people who were perhaps not the originally intended target audience. Content shared on WhatsApp can therefore often take on a life of its own.

For this reason, Amnesty International India's principal is to only share specific campaign tactics and actions via WhatsApp groups - never the overall strategy (i.e. don't assume that just because your WhatsApp groups only consist of your supporters, the things you send them via WhatsApp won't end up in the wrong hands). WhatsApp groups do sometimes receive invitations to in-person campaign strategy sessions though.

Difficult to generate engagement metrics

Unlike, say, Facebook Pages, WhatsApp on its own offers little in the way of engagement metrics to managers of groups and broadcast lists. However, the platform does let you see how many people have read a particular message. This feature can be combined with tools such as Bitly (which lets you create multiple, unique links for a single webpage) in order to calculate metrics such as click-through rates, although this is much more labour intensive and time consuming than other platforms. However, managing multiple groups does provide you with the opportunity of testing different messages and content in order to see which ones generate the most engagement.

Warning: The other side uses WhatsApp too!

WhatsApp is not inherently a progressive tool. Although WhatsApp employs end-to-end encryption, it is owned by Facebook, and like the other platform has back-end tracking metrics, the nature of which is unclear.

Right-wing mobilization to influence Elections

It's not just progressive groups who are mobilizing on WhatsApp. When messages are forwarded, there is no hint of where they originated.

- In India, the right-wing BJP party is using Whatsapp as their primary mobilization tactic. In the 2018 elections, "the B.J.P. and Congress parties claimed to have set up at least 50,000 WhatsApp groups between them to spread their messages"
- A Muslim man who was killed by hindutva nationalist members of the BJP for allegedly killing a cow. It was broadcast on whatsapp, and amplified in realtime https://www.aljazeera.com/programmes/listeningpost/2017/12/deadly-rumours-india-whatsapp-dilemma-171216091928319.html
- Karnataka BJP members used whatsapp to circulate "fake polls, hoaxes about the killings of Hindu activists and false claims that a Muslim lawmaker had promised "unending bloodshed of Hindus" if voted into power"

Spreading racism/fascism through fake news

In the south of India, a false account of a child kidnapping gang went viral via WhatsApp leading to murders and lynchings that target trans women, among others. https://www.cnn.com/2018/05/28/asia/india-transgender-whatsapp-mob-intl/index.html

Further resources for using WhatsApp

Articles

- How charities are adopting WhatsApp
- Activists using WhatsApp to confront Mugabe's regime in Zimbabwe
- Facebook to integrate WhatsApp, Instagram and Messenger - BBC News

Attribution

Input and resources for this framework were provided by:

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Section 4.

Self-Defense for Organizers and Campaigners

With new possibilities for efficient mass organizing and peer to peer exchanges come risks for campaigners and organizers as well. Our highly connected lives open serious security and privacy risks and make us vulnerable to attacks from those who would like to thwart our work. Likewise, the ability to publish false and damaging information that threatens us is also, unfortunately, part of the landscape we work in now. Luckily, progressives are actively working on strategies to shore up our defenses.

Self-Defense for Organizers and Campaigners

Guide Summaries: Click on titles to go directly to the guides

DEALING WITH DISINFORMATION

Disinformation (the intentional spread of false and misleading information) and misinformation (the unintentional spread of false information) are not new phenomena. What is new is the ability to rapidly create, disseminate, and consume false and misleading content on a global scale via an interconnected digital media landscape.

The hostile actors (e.g., the Kremlin-linked Internet Research Agency) who create disinformation campaigns rely on provocative, divisive, and/or disturbing content to get our attention in an immensely crowded digital media landscape. The goal is to evoke emotion. Emotions like anger, jealousy, and fear drive content resharing on social media platforms.

DIGITAL SECURITY BASICS FOR CAMPAIGNERS

Digital security practices help protect campaigners from malicious online attacks and intrusive surveillance efforts led either by groups that are hostile to your agenda or by repressive government agencies.

DEALING WITH DISINFORMATION

Summary of: Dealing with Disinformation

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Case in point, during the 2016 presidential elections in the United States the Kremlin-linked Internet Research Agency (IRA) ran a polarizing disinformation campaign that used Facebook advertising to exploit existing racial tensions, biases, and divisions. More specifically, *USA Today's* analysis of the thousands of Facebook ads created by the IRA found that:

- Over half of the 3,500 ads referenced race. This accounted for 25 million ad impressions.
- Close to a quarter of the ads engaged policing and crime, commonly with a racial connotation.
- In the final months prior to the election there was an average of 400 divisive racial ad buys a month.

The racist advertisement below, which targeted Facebook users interested in topics like Southern pride and the Confederate flag, received 40,000 clicks and 500,000 impressions (to see other Russian Facebook advertisements, check out this article in *New York Magazine*).

Russia's interference in the 2016 presidential elections was a wake-up call. Efforts to deal with disinformation since then offer valuable lessons. This guide deals with the issues faced by ordinary campaigners, activists and organizations challenged by disinformation in their day-to-day efforts to make progressive change. It also references the larger projects tackling the systemic causes of disinformation, such as government actors, media platforms, and broken internet infrastructure, but we primarily focus on what you can do right now. In other words, *this guide is mainly about steps to take if a lie about your campaign is being spread on Facebook, for example, rather than how to campaign to change Facebook itself.*

One of the most valuable lessons we learned from campaigners who successfully dealt with disinformation was that it was not always necessary to deal with it. So if you only read and act on one part of this guide, we would recommend the first of the "Steps to take" on risk assessment and mitigation. It may save you from losing time, emotional energy, and reputation in reacting (or overreacting) to disinformation, which unfortunately is becoming a challenge most campaigners will face at some point.

Who's dealing with disinformation well?

The Eighth Amendment Referendum campaign in Ireland is a useful case study that highlights the way Together for Yes, The Transparent Referendum Initiative, and Repeal Shield effectively addressed disinformation surrounding abortion. Together for

Yes is a national grassroots movement and civil society campaign comprised of 70 different organizations fighting for access to abortions in Ireland. The Transparent Referendum Initiative (TRI) is a volunteer run organization committed to ensuring digital advertising transparency in Irish electoral campaigns. Like TRI, Repeal Shield is a volunteer-based service that formed in response to the Eighth Amendment Referendum campaign in Ireland. Repeal Shield uses Block Together to improve the Twitter experience for pro-choice users.

The Russian disinformation campaign against the Syrian Civil Defense, also referred to as the White Helmets, is another useful case study. The Syria Campaign produced the report 'Killing the Truth', which exposed the mechanics and motivations of conspiracy theorists, Russian state media, and thousands of social media trolls and bots who amplified each other's disinformation about the White Helmets.

A final case example from the 2019 European Parliament Elections relied on crowdfunded fact-checking to take on disinformation. The Brussels based AVAAZ team of 30 people uncovered content missed by 30,000 Facebook monitors. They produced 700 pages of results that illustrated how fake accounts in France, Germany, Italy, the Netherlands, Poland, Spain, and the UK were being used by the far-right. Their work led to Facebook shutting down this web of disinformation in Europe.

In addition to case studies, it is useful to have a general awareness of some projects and institutions engaging the systematic causes of disinformation. The EU Disinfo Lab is an NGO that developed a methodology to map social media clusters of disinformation. They are committed to addressing the international scope of disinformation and identifying solutions to address the insufficiency of the current legal framework. The Mozilla Foundation is a nonprofit committed to building an open, accessible, and healthy internet. Misinformation is a specific aspect of internet health that Mozilla is working to address. In September 2018, Mozilla, the European Union, Google, Facebook, Twitter and various trade groups created the Code of Practice on Disinformation.

There are also organizations that solely focus on misinformation and disinformation. First Draft is a nonprofit that uses fieldwork, research, and educational resources to fight disinformation and misinformation. Misinfocon is a global movement to address misinformation that brings together experts from policy, advocacy, media literacy, cybersecurity, and social science. Finally, the Credibility Coalition is an interdisciplinary community that takes a holistic approach to misinformation focused on improving the media ecosystem and strengthening media literacy.

Why worry about dealing with disinformation?

Disinformation in its different forms has been blamed for various events and trends, from the 2016 US Presidential election and Brexit referendum, to the decline of trust in institutions, rise of support for reactionary populism, even acts of extremist violence.

Aside from those global consequences, the campaigners we spoke to explained how it affects them specifically, and why we should all be aware of its dangers.

On the **individual** level, being lied about simply hurts. Campaigners and activists throw themselves into the causes they care about, so disinformation is especially painful when it deliberately targets individuals and their integrity, motivation, and personal lives. Anna Ridout from The Syria Campaign pointed out that they work with ordinary people who are risking and losing their lives to save others, and that when they are slandered, “you cannot underestimate the impact that has on the morale” of those volunteers, and the staff and supporters who know them. This human impact should not be minimized when calculating our response to disinformation.

On the **organizational** level, disinformation has in some cases led to funding being cut, public support dropping, and legal issues - even if the disinformation is not believed. However at an earlier stage, the more common impact on organizations is simply that resources are wasted because of the time spent monitoring and deciding how to respond to it, as well as the opportunity cost of not putting out your own message while figuring out whether to respond and how. Part of the advice within this guide is how to streamline that internal process so that we do not give the spreaders of disinformation that first victory of having wasted our time.

On the **strategic** level, the reason our opponents spread disinformation in the first place is because they think it will harm our causes, and that is true in different ways. As campaigners, we are often trying to mobilise people to act - we are in an asymmetrical contest where progressives need to break through apathy. When basic facts are in question, that makes our work harder. Disinformation does not have to be proved, or even believed, for it to prey on people’s tendency to feel “no one has clean hands”, which undermines trust and optimism in change. For example, The Syria Campaign’s hope for justice and accountability in Syria’s conflict relies upon the eyewitnesses to war crimes - the primary strategic goal of the disinformation they face is clearly to discredit those voices.

What dealing with disinformation requires

Assessing the untraceable impact of disinformation

When the Eighth Amendment Referendum passed by an overwhelming 66%, the effort to reform abortion rights in Ireland was a success. Stil, the challenge of dealing with disinformation should not be underestimated. Together for Yes volunteer Jean O’Brien, “the big anxiety was the money that the No side had” they were able to bring “in consultants and tactics from the successful Trump and Brexit campaigns” She added, “we didn’t know our tactics had worked until polling day as there was very little visibility.”

Well funded hostile actors with extensive resources pose a major threat due to the way they can control public discourse. The way they can bleed into the national conversation in untraceable ways. Maeve O’Reilly of the London-Irish Abortion Rights Campaign positioned this as a huge concern. Turing to O’Reilly, “people would talk about conversations with family members who were repeating false statements they'd obviously heard directly from the anti-choice campaign." Disinformation also influenced media framing. For example, "interview questions would be framed in a way that was clear it has been influenced by the disinformation," according to O'Reilly. The opposition also relied on tactics to misrepresent the level of support for abortion reform. Case in point, they set up copycat "4Life" accounts for any grassroots pro-choice social media account. The false accounts made it look like there was equal support on both sides.

Digital Transparency

Disinformation thrives in climates that lack transparency. The good news is there are creative ways to generate digital transparency. For example, The Transparent Referendum Initiative (TRI) is a volunteer run organization that was founded to ensure digital advertising transparency in Irish electoral campaigns. Over 500 TRI volunteers created a crowdsourced database of online political advertisements that were used to target Irish Facebook users during the 2018 Eighth Amendment Referendum campaign. The database, which includes 1,500 Facebook ads, was created by Irish voters who contributed by downloading the WhoTargetsMe plugin. The Eighth Amendment Referendum campaign also provides a useful lesson related to disinformation on Twitter. More specifically, Repeal Shield is an application that uses Block Together to improve the Twitter experience for pro-choice users. Like TRI, Repeal Shield is a volunteer run service.

Attention to Messaging

Messaging is an area of central importance when trying to deal with the impact of a disinformation campaign. Instead of engaging the inaccurate information, Jon Lloyd of the Mozilla Foundation emphasizes the power of really **clear and direct messaging of key points**. The value of this approach is you avoid being reactionary, while at the same time you are actively conveying a message that requires the other person respond to you. Another way to avoid being reactionary while still disseminating your message is **personal testimony and storytelling**. Together for Yes used personal testimony in the fight for abortion rights in Ireland. Storytelling is also a useful tool. If you are a campaigner looking for a webinar to use storytelling to deal with dis-information you can check out "Trump vs. the Truth: Winning the Battle of Story." This Power Labs webinar provides a story-based strategy to fight disinformation. **Staying away from divisive rhetoric** is a final messaging tool that can help you deal with disinformation. Again, Together for Yes is a useful example. The main slogan/name of the organization embodies a positive collaborative approach, as does their positioning of Ireland as a compassionate country and their appreciation for diverse view:

> *"The Together for Yes campaign respects the diverse views people hold on this issue. We understand that this is a complex and sensitive issue for many. We know that life is not black and white; that it is sometimes grey and complex. We believe that people in Ireland have the compassion to understand that the*

Constitution is not the place to decide the complexities of crisis pregnancies because it is too blunt (Together for Yes, Who We Are).”

Setup + stages for dealing with disinformation

1. **Risk assessment and mitigation:**

   A proactive assessment is an effective way to identify and mitigate specific risks tied to disinformation. Thoughtfully assessing potential opponents; planning for a potential disinformation campaign related to your organization/the issues you cover; and evaluating organizational transparency are specific ways to assess and mitigate risks. As Jon Lloyd of the Mozilla Foundation described it, “this is like installing a smoke alarm”. There are a number of steps that would strengthen your cause even if you do not currently face disinformation.

   a. **Preemptively building resilience:** Many of the steps that are necessary to build your resilience for dealing with disinformation are the same as those needed to build a resilient campaign strategy or a crisis communications plan (e.g., risk matrix, identifying potential third party allies and opponents, ‘red teaming’ potential defensive scenarios). Check out the guides below for additional information about crisis planning.

      i. ‘Crisis Communications for Charities: a best practice guide’ from Charity Comms

      ii. ‘Creating a Rapid Response System’ from Mobilisation Lab

   b. **Radical organizational transparency:** Radical organizational transparency is a way to avoid attacks from hostile actors seeking to discredit your organization. Two nonprofits spoken to for this guide cited a common accusation about their sources of funding. Both nonprofits felt that if their funding had been transparent (or at least explained) on their websites it would have been easier to respond, or potentially prevented the suspicion that “there was something to hide” in the first place. Here are two resources to help with radical transparency.

      i. Restless Development, who won the UK international development sector's 'Transparency Award' for measures including livestreaming annual meetings of directors, publishing all partners, their ethical fundraising guidelines, and the salary levels of all staff positions in all 10 countries. More best practice for this 'dynamic accountability' is at the website of Accountable Now.

ii. Engineers Without Borders published a 2011 'Failure Report' that was celebrated by the organisation Fail Forward. Fail Forward aims to publicise, celebrate, and advise NGOs in how to be transparent about failures and lessons.

2. Monitoring:

Monitoring is a useful practice. Still, it can consume an extensive amount of time and emotional energy. The goal is to utilize efficient monitoring methods.

a. **Monitoring Posts:** You can use a combination of Crowdtangle (free), Tweetdeck (free), and search queries to monitor what is being said about your organization/issues and identify potential disinformation threats. This article from First Draft explains how to use these tools to monitor misinformation.

b. **Monitoring Advertisements:** Facebook launched the Ad Library in March 2019 which intends to make it easier to search for all the ads (on both Facebook and Instagram) run by any page. This tool allowed a Media Matters researcher to identify that President Trump ran 2,200 Facebook advertisements with the word 'invasion' before the mass shooting in El Paso. Please be aware that Mozilla documented serious gaps and problems with Facebook Ad Library and API system as of July 2019. Google has its own political transparency database for ads on its search engine and YouTube. Currently, this database does not include issue ads (e.g. an advert about climate change, which does not mention political parties).

c. **Using Volunteers to Monitor Advertisements:** Volunteers are an effective way to monitor dark advertisements. Ireland was one of the first countries to test Facebook ad visibility. This gave Together for Yes volunteers the opportunity to research disinformation on opposition pages. At the time, this functionality was still at an early stage. Nonetheless, the volunteers could see the metrics on engagement (they could not click through to profiles of those liking or sharing the post) and the kind of messaging opponents were testing. Together for Yes used a two step process for ad monitoring. First, they set up a google spreadsheet of pages they knew would run ads. Second, they assigned volunteers to check and take screen grabs on a daily basis. To speed the process up they created a basic tool to put iframes on an html page so you could check 20 at once. Later when their opponents dramatically ramped up spending they developed a tool which scraped the pages automatically.

3. **Reporting**
   a. Flagging content on Facebook as disinformation.

   b. Flagging content on Twitter as disinformation.

4. **Responding**

   a. **Don't overreact:** Analytics investigations have shown the scale of the disinformation campaign against the White Helmets volunteers in Syria. Still, Anna Ridout of The Syria Campaign warned against reacting to the quantity of noise that can be generated on social media: "It's easy to get trapped in the bubble, you can focus on a tweet from someone with a reach of 1,000 or you can get on the front page of Time Magazine - they're not equal. That's the problem with disinformation, you can get sucked into defending yourself, worrying about one tweet, and a lot of it no one reads." This does not mean that you should always brush it off, sometimes the disinformation crosses a line that should be dealt with, and Anna gave the example of hate speech as a threat that should be flagged to the platform.

   b. **Respond efficiently:** If you choose to directly counter a disinformation campaign it is best to have a thoughtful and coordinated response. For example, the Syria Campaign produced the Killing the Truth. This report exposed the mechanics and motivations of conspiracy theorists, Russian state media, and thousands of social media trolls and bots who amplified each other's disinformation about the White Helmets. The report was efficient due to the way it comprehensively dissected the most repeated lies in one document. The report also addressed a major vulnerability associated with disinformation by demonstrating how a series of supposedly linked independent sources tied back to a single lie. The benefit of this approach was that a single, authoritative piece of content - backed up with sources and mountains of data - was established, covered by mainstream media, and existed via a link that could be used over and over.

The tricky parts of dealing with disinformation, and some fixes

Fact Checking:

Fact checking is a widely used tool that comes with some significant issues. Two specific issues noted by Jon Lloyd of the Mozilla Foundation are inaccurate statements that can't be fact checked and the unwillingness of people to believe fact checkers. Another issue, according to Lucas Graves (2018) is the vast differences in the way fact checkers operate (e.g., funding structures, institutional affiliations, methodologies, and ideologies) and in what they deem factual. Graves 2018 article "Boundaries Not Drawn: Mapping the institutional roots of the global fact-checking movement" is available for free until December 31, 2019.

Filter Bubbles:

Filter bubble, a term coined by Eli Pariser, is an information silo that confirms an individual personal views. People knowingly self-select into personalized information silos on social media platforms like Facebook and Twitter and unknowingly are directed to news that confirms their worldview by new media gatekeepers (e.g., Facebook, Twitter, and Google) based upon algorithms that make use of their digital footprint.

Community Care:

False and misleading information causes frustration, anguish, and pain for the communities targeted by the disinformation/misinformation and the campaigners and volunteers monitoring/evaluating the content. While there has recently been more attention paid to creating resources to support the general mental wellbeing of campaigners, we would be grateful for anyone who can share specific resources or tips for tackling the impact of disinformation on individuals.

Further resources for dealing with disinformation

Guides

- **A Field Guide to Fake News and Other Information Disorders:** This field guide is a project from First Draft and the Public Data Lab.
- **MediaReDesign:** MediaReDesign is a document that provides information and links to resources surrounding the media ecosystem, fake news, journalism, media literacy, and much, much more.

Organizations

- **FullFact.org:** FullFact.org is a UK based fact-checking organization.

- **News Nerdery:** News Nerdery is an international organization committed to knowledge sharing and news collaboration.
- **Open News:** OpenNews is a US based nonprofit working with communities to strengthen the media ecosystem.
- **The Tectonica Organising Network**: Tectonica is setting up an international fake news working group that pulls together campaigners and organisers to learn about their positive and negative experiences with fake news. Contact them to join.
- **The International Fact Checking Network:** The International Fact Checking Network is a project within the Poynter Institute that was founded in 2015 to connect fact-checkers across the globe.

Articles and Case Studies

- Allcott, H. And Gentzkow. (2017). Social Media and Fake News in the 2016 Election.

Attribution

Input and resources for this framework were provided by:

Jean O'Brien with Digital Charity Lab, Maeve O'Reilly with London-Irish Abortion Rights Campaign, Jon Lloyd with Mozilla Foundation, and Anna Ridout with The Syria Campaign.

This framework was prepared and reviewed by:

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DIGITAL SECURITY BASICS FOR CAMPAIGNERS

Summary of: Digital Security Basics for Campaigners

Digital security practices help protect campaigners from malicious online attacks and intrusive surveillance efforts led either by groups that are hostile to your agenda or by repressive government agencies.

Who needs Digital Security Basics?

Groups working on social/racial justice, environmental, immigration and refugee issues, as well as gender and reproductive rights are being targeted by hackers/trolls that are intent on subverting their work for political reasons. These groups often learn the price of unsecured digital tools the hard way when their accounts are accessed and corrupted by malicious actors. Campaigners working in environments under repressive regimes must also adapt their digital security practices to prevent surveillance and attempts to neutralize their groups through hacking and information leaks.

Why worry about Digital Security Basics?

Groups that put in place some basic digital security practices and tools are saving themselves from some potentially damaging attacks with a little effort and attention.

Take your internal digital security seriously! Make it as high a priority as data analysis, matching voter files to internal records, etc. Recent reports suggest that the Clinton campaign actively rejected advice to turn on two-factor authentication on its Google accounts. The result was Clinton's campaign manager getting hacked -- in a way that couldn't have happened had he turned on two-factor authentication. This in turn enabled the release of thousands of damaging emails. The rest is history. Without security it's potentially game over.

Important first step: Threat/risk level assessment

Dia Kayyali, [writing for the Center for Media Justice](), explains that a threat modeling or risk assessment requires asking yourself the following five questions and recommends taking out pen and paper, brainstorming and consider discussing these questions along with the people you work closely with, since security is a collective effort:

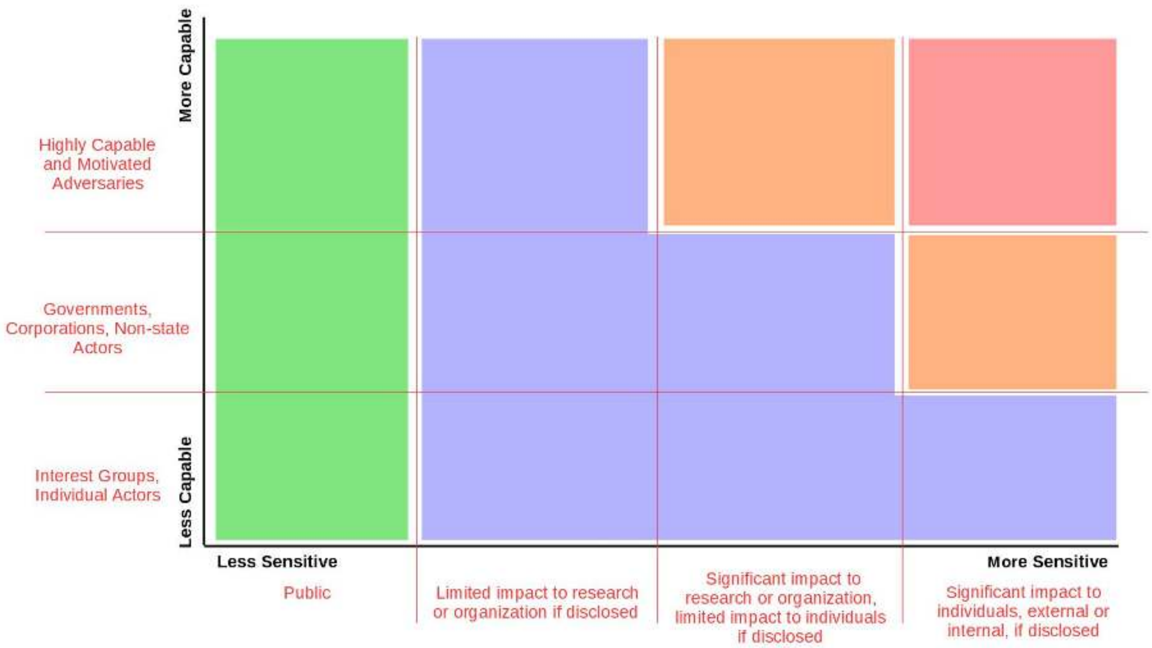
- What do I need to protect?
- Who do I need to protect it from?
- How much do they want that information, and how easy is it for them to get it?
- What happens if they do get it?

- What am I willing to do to stop that from happening?

A useful tool for conducting a risk level assessment is the Secure Communications Framework (SCF), developed by Tim Sammut. This tool uses a simple chart on which you can plot the different kinds of information, materials and data that your organisation works with, according to:

- The **capability** of external actors (adversaries, be they individuals or organizations) that would like to acquire this information, for undesirable purposes
- The **impact** of having this particular type of information compromised or exposed.

If your organisation manages data or information that falls in the blue quadrants (in the illustration below) then following basic best practices for digital security, as outlined in this guide, is sufficient. If you manage information in the orange quadrants then more stringent measures are required and it may be desirable to seek support from trusted security experts, such as the groups listed below. If your organisation manages information that falls into the red quadrant then working with trusted security experts is a must.



Secure Communications Framework (Tim Sammut)

Setup + stages for Digital Security Basics

***If your threat level assessment reveals a very high risk of attacks, it is best that your organizations seek direct support from one of the groups listed below.

Groups facing a low to moderate threat can start with this list of 'must-do' practices that will close some of the basic vulnerabilities that are most often exploited by hackers.

Check if you have updated your OS, browser, and apps on all org computers and devices

More than 90% of software and operating system (OS) updates are to patch security vulnerabilities in programs!

Safety and privacy whilst browsing

If you are using public / untrusted wifi, using a Virtual Private Network (VPN) is recommended. A good open source option is Psiphon. If you are concerned about particular websites tracking your internet browsing then you can install an extension like Privacy Badger.

When you are browsing, a useful extension you can install is HTTPS Everywhere, which ensures you always use encrypted communication with a website, where possible.

Turn on two-factor authentication for every cloud service you use, work and personal.

"Two-factor authentication" adds an extra step when logging into an account. It requires you to enter a code (generated by an app or by a text message) in addition to a password. It's an important protection against "phishing" attacks, which can trick you into providing your login credentials to someone else. Services that provide two-factor authentication include Google accounts (covering Gmail, Calendar, and Drive), iCloud, Twitter, Facebook, Dropbox, Box, Microsoft accounts, and more (a more comprehensive list can be found here). For more protection, consider Google's Advanced Protection Program, which provides hardware "keys" that are necessary to log in to your accounts. (The Digital Security Exchange can provide these kits for free.). As a rule of thumb, if a service provider does not offer two-factor authentication then do not use it to store sensitive information.

Download and use Signal and Jitsi and get your colleagues to do it too.

Signal is a popular and secure messaging app that encrypts all of your conversations with other Signal users. It's important because regular SMS text messages are easy to intercept by law enforcement and other third parties. Signal makes it impossible for anyone but you to read the messages of those your communicating with. Plus, it has a great desktop app and it's easy to set up groups.

For secure online conferencing, campaigners who face security concerns recommend Jit.si - https://jitsi.org/

Use a password manager to create and store strong passwords.

Weak passwords are an invitation to be hacked. A password manager like LastPass, 1Password or KeePass makes it easy to create unique, strong passwords for every account you have. Install one of those apps and start replacing and saving your passwords for all of your accounts. In addition, make sure the login passwords for your personal devices and for your password managers are strong.

Pro tip: It's a myth that strong passwords must contain every character under the sun. In fact, length is what matters. So when possible, use passphrases, not passwords. For example, a passphrase like "the russians probably interfered in our election" is a very strong passphrase!

Sarah Lange and Holly Davis from Blue Pine Strategies recommend the following wrt passwords:

- At least 13 characters in length
- Add numbers and special characters
- Use both uppercase and lowercase letters

Easy to remember, hard to crack:

- Line from a favorite book, movie, or song
- Address (not linked to you!)
- Mantra or intention
- Passphrase

Do not use information publicly available about you:

- Name of your partner, child, or pet
- Favorite sports team
- Favorite food

Change passwords frequently:

- Ideally every 3-6 months

Prioritize accounts for complex passwords

- Use one password per account

Make sure all of your devices are encrypted.

This makes it much harder for law enforcement or hackers to access the data on your devices. iPhones are already encrypted. Android phones are not (unless you have a Google Pixel), so you should go into the the Security settings and enable encryption. On Mac computers, go into System Preferences, then Security & Privacy, and turn on FileVault. On Windows, you should use the BitLocker application (preinstalled) to encrypt your drive.

If you want to encrypt specific information / files on your device then you can use an open source program like VeraCrypt.

Pay special attention to external hard drives and USB keys

Often forgotten in these measures are the external devices that we store our data on. Consider though that some of the most serious data leaks cames as a result of people leaving these devices around unprotected!

- First step is keeping a close eye on these devices and not leaving them around
- It is recommended that you encrypt your flash/hard drives and set password protection to access them

Mobile device security

- Make sure your mobile PIN is at least 6 digits, it is much easier to crack a phone with only 4.
- Make sure you keep auto-update of your applications switched on and ensure they are kept up to date. For Android, only download applications from the Google Play Store. If this is not possible, you can first upload APK files to www.virustotal.com.
- Take extra care when accessing organisational information over public wifi - if you need to do this regularly then invest in a VPN.
- For groups that have more acute security concerns, a factory reset of mobile devices is recommended every few months to make sure any malicious tracking is wiped out (but this presents the inconvenience of re-configuring devices)

The tricky parts of Digital Security Basics, and some fixes

Most digital security measures take some time to implement and get used to. In the busy and resource-strapped world of advocacy campaigning, this can be a drag. However, if your security risks are low to moderate, then the measures outlined above may take some adjustment to implement but generally do not add a lot of extra time to day to day operations once they have been put in place.

Support groups

For groups around the world

If you represent a progressive group that needs immediate help, reach out to Access Now's Digital Security Helpline, which is available 24/7: https://www.accessnow.org/help/

For U.S. civil society groups

The **Digital Security Exchange** is here to help grassroots organizations build up their digital security. Contact us at info@digitalsecurityexchange.org for a free risk assessment.

The folks at **Ragtag.org** run a 'help desk' to support progressive campaigners. You can submit digital security questions to them here: https://www.campaignhelpdesk.org/

Blue Pine Strategies

Holly and Sarah, who helped with this guide, are available to discuss your group's situation and can help build a digital security approach for orgs large and small.

Get in touch for more information and services:
holly@bluepinestrategies.com
sarah@bluepinestrategies.com

Further resources: Digital Security Basics

- Center for Media Justice - Getting Started with Digital Security: Tips and Resources for Activists

- Electronic Frontier Foundation's guide to Security Self-Defense: https://ssd.eff.org/ and guide to Surveillance Self-Defense: https://ssd.eff.org/

- Access Now's "A First Look at Digital Security," which features a number of risk profiles (and is great for leading trainings): https://www.accessnow.org/first-look-at-digital-security/

- Martin Shelton's "Securing Your Digital Life Like a Normal Person": https://medium.com/@mshelton/securing-your-digital-life-like-a-normal-person-a-hasty-and-incomplete-guide-56437f127425

- How to Lead a Digital Security Workshop https://motherboard.vice.com/en_us/article/4xby8g/how-to-give-a-digital-security-training

- "A DIY Guide to Feminist Cybersecurity": https://hackblossom.org/cybersecurity/

- APC's Digital Security First Aid Kit for Human Rights Defenders: https://www.apc.org/en/irhr/digital-security-first-aid-kit

- Tactical Technology Collective's Security in a Box: https://securityinabox.org/en/tools/

Attribution: Digital Security Basics

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This guide was prepared and reviewed by:

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Appendix A: Full list of Blueprints for Change helpers and contributors

Helpers past and present:

Our helpers "bottom line" the work it takes to put guides together. Participating as advisors on guide accessibility and community needs and/or in one or more of our three working groups, helpers gather together information, reach out to contributors and edit our guide drafts, often adding in their own experience as campaigners. They also make sure the principles of inclusion, diversity, equity and liberation are reflected in our processes, content and community and also find networks of progressives that might be interested in our guides.

Alan Smith, Alison Brzenchek, Amanda Tattersall, Amara Possian, Aram Fischer, Chris Alford, Jacqui Howard, Jon Lloyd, Juan Fernandez Ochoa, Kunoor Ojha, Mary-Alice Crim, Meaghan Carmody, Rachel Shiozaki, Sam Pearse, Sarah Ali, Sho Konno, Tania Mejia, Tasha Adams, Tess Ortega, Valerie Love,

Founding helpers/bottom-liners are: Meredith Horowski and Tom Liacas.

Content contributors:

Contributors are people or groups that we have reached out to for guide content or are authors of the guide content we have taken from public sources, such as published articles or books. We are grateful for their contributed knowledge and experiences, without which we could not have created our how-to guides.

Anna Ridout, Annie Kia, Ari Sahagun, Augustus Franklin, B Loewe, Becky Bond, Blue Pine Strategies, Celine Trojand, Clodagh Schofield, Cristina Calvillo-Rivera, Daniel Souweine, Darren Barefoot, Dave Meslin, David Karpf, Deepak Puri, Dia Kayyali, Digital Security Exchange, Doug Hattaway, Emily May, Enrica Duncan, Esther

Foreman, Ethan Cox, Free Press, Freedom to Marry Conversations, Hannah Roditi, Hollaback!, Holly Davis, Issa Amro, Jamie Bridge, Jasmine Somaiah, Jason Mogus, Jean O'Brien, Jessica McKenzie, John Baimas, Jon Warnow, Josh Levy, London-Irish Abortion Rights Campaign, Maeve O'Reilly, Mario Alvarado, Marisa Franco, Martin Shelton, Marty Kearns, Matt Price, Michael Hoffman, Michael Sabat, Michael Silberman, Mobilize America, Naindeep Singh, Nick Allardice, Nick Ballard, Nicole Fairall, Nossas, Organizing for Action, Organizing for Change, Paul de Gregorio, Randall Smith, Reilly Yeo, Rodrigo Arnaiz, Sanam Sutirath Wazir, Sarah Aoun, Sarah Lange, Soledad Vega, Steve Anderson, Steve Nagai-Ma, Stuart Melvin, SwingLeft Academy, Tania Unzueta, The Syria Campaign, Thelma Young, Tony Kokkad, Victorian Trades Hall Council, Zack Exley

Content partners:

We are very grateful to the following organizations, who have consistently helped us by contributing valuable information and by making referrals to people with expertise that we could interview for our guides.

Our principal supporter for promotion and content: Mobilisation Lab

Action Network, CallHub, Change Makers Podcast, DemLabs, Digital Security Exchange, Free Press, GatherVoices, GetThru, Indivisible, Open Media, NetChange Consulting, New/Mode, PowerLabs, Social Movement Technologies

Conversation partners:

We are also very grateful to these conversation partners, who have guided the project in its early stages with their input. They include:

Jason Mogus, Jodie Tonita, Nicole Carty and Michael Silberman.

Our community of campaigners and organizers:

Thanks to the over 500 people signed up to our updates and discussion list at blueprintsfc.com! We have often asked you for ideas and help with guides and this crowdsourced wisdom is as essential part of what makes Blueprints for Change work.

Appendix B: Project intent and IDEL values

Project intent:

The goal of this project is to co-create useful resources that help organizers and campaigners around the world "up their game" quickly. With more agile strategies and execution, we'll be better equipped to make progressive social change happen at a time when we really need more of it. We want to compile knowledge and direct experience to make shared best practices freely accessible for as many progressive campaigners as possible. We also want everyone who contributes to feel respected and empowered in the process.

Driving us is a desire to share best practices, build a community of practitioners, enable open collaboration and to help progressive campaigners and organizers innovate so that we can achieve more wins on all fronts.

All of the how-to's created by this project will be made freely available to any person or group who could use them for sharing, editing and remixing under a Creative Commons license.

Values & how we live them:

Blueprints for Change is a values-driven project. We are all trying to go beyond our comfort zones and usual networks of peers to create something inclusive and empowering for all involved. Through our guides and networked model, we are attempting to revise current dominant narratives and archetypes around campaigning and organizing, prioritizing people-powered change led by those who are most marginalized.

To echo the change we are attempting to create, we aspire to the following set of values though. As a volunteer-led movement, we admit that we're not 100% there yet and still have a lot of work and learning to do - but we reflect on these values as our guiding points and touchstones

1. **Equity.** We aim to reflect the many voices and perspectives of our partners in the advocacy community in our team of advisors, bottom-liners and content contributors. We particularly seek the perspective of individuals who identify as black, indigenous, people of color, women, queer, trans; the voices of those outside of developed countries; campaigners working with limited funding and access to tools, all those are marginalized in a system of capitalist and white supremacist patriarchy, and are building the movements we need for a fairer society. We welcome and ask for voices that will challenge and shake up our notions of how to compile/share experience and what is or is not useful to the communities we are trying to work with.

2. **Empowerment.** We want everyone participating in this project to feel that they are gaining something useful from the experience. We are conscious of the value of people's time and ideas and will seek their input on how to create exchanges of time, skill and resources that are fair and productive for our advisors, contributors and bottom-liners. We also value utilizing the development of these guides a way to empower communities that are marginalized in our broader society, strengthening their experiences and telegraphing and achievements - all to strengthen our global work of change making.

3. **Transparency.** We believe in open communication, transparency, and honesty in our content, partnerships, attributions and promotion. This is why we have tried to lay out all the thinking and decision-making processes behind the project in this doc so that everyone knows what they are getting involved with and feels free to challenge the structures as they are. We also believe in revisions to our transparency and overall model, including listening to and adopting feedback from campaigners.

4. **Collaboration.** We seek to collaborate with progressive organizers and campaigners and the movements they represent. Our place in the movement ecosystem is to listen to the needs of campaigners, develop collaborative resources to address those needs, and share them freely with respect across borders and issue areas. We seek to engage campaigners across the world with skills or interest to contribute or collaborate, to share their skills and knowledge in the methods comfortable to them, so that we can all win and learn together.

5. **Liberation.** Through the production and collaboration on guides, we seek to liberate campaigners and our work from typical challenges in organizing around access - be it access to tools, funding, training and connection. We seek to include all voices, tailor our work and guides across language, time zone, experience and funding status and include additional and ongoing voices and experiences.

Appendix C: Editorial approach and guidelines

General:

The how-to's created for Blueprints for Change should be drawn from campaigning practices that are:

- Emergent (new and not yet fully documented)
- Field-proven (have been applied with success in prior campaigns).

Topic sourcing:

How-to subjects should be on topics that are in demand by campaigning groups. The topic should answer one or both of the following criteria:

- Sourced as a direct request from our audience of campaigners
- Topic is confirmed as needing a how-to by at least 1 Helper

Knowledge sourcing:

Knowledge presented in how-to's should reflect the true lived experience of campaigners who have deployed the tactics/strategies described and ideally reflect the diversity of practitioners involved in such campaigning. Campaigner testimonies, however, can be drawn either from direct interviews or previously published accounts.

When accessing the time and insights of campaigners, a skills or resource-exchange discussion should be had to make sure that those contributing feel they are adequately compensated for this.

- Draw from testimonies of at least 2 campaigners who have extensive experience with deployment
- Contributors feel that this use of their time and insights is fair and equitable

Peer review:

To ensure that our how-to texts are as helpful as possible and to respect the experiences of campaigners referenced while including as much relevant expertise as possible, we will submit each draft for internal and external review before releasing it to a wider audience.

When drafts are considered semi-complete but still awaiting final input, they will be published on the Blueprints for Change microsite with DRAFT flagged on the file name and an explainer box within the doc that notifies people that final review is still in process.

To move from DRAFT to 'shareable' state, how-to's must meet the following criteria:

- Draft has been reviewed by at least 1 Blueprints Helper with experience deploying the tactic/strategy being presented
- Offer to review/correct has been sent out to all campaigners whose voices are represented in the doc
- Offer to review/contribute has been sent out to global experts on the subject (as determined by our Helpers)

Future how-to ideas and how to suggest more

We welcome future how-to topic ideas from our community! We have started a crowdsourced topic list here that you can comment on. If you don't feel comfortable commenting on a public google doc, please write us at blueprintsfc@gmail.com

Bonus points if you submit an idea along with some suggested people or groups who could provide some content on it for us!