

OFA

.....

ORGANIZING

.....

MANUAL



ORGANIZING FOR **ACTION**

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“Organizing teaches as nothing else does the beauty and strength of everyday people. Through the songs of the church and the talk on the stoops, through the hundreds of individual stories of coming up from the South and finding any job that would pay, of raising families on threadbare budgets, of losing some children to drugs and watching others earn degrees and land jobs their parents could never aspire to — it is through these stories and songs of dashed hopes and powers of endurance, of ugliness and strife, subtlety and laughter, that organizers can shape a sense of community not only for others, but for themselves.”

— Barack Obama, 2009

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This manual represents the collected best practices of Organizing for Action volunteers and staff. It is intended for OFA volunteers working in our organization in many capacities — fellows, chapter leads, data captains, statewide resource leads, and brand new volunteers, just to name a few examples. The information in this manual gives context on how OFA develops its strategy and how volunteer leaders can adapt that strategy to the local level. It provides information about best practices in issue organizing and building people-centered, metrics-driven grassroots issue advocacy campaigns. And it provides places for you to reflect on how to adapt these methods to the organizing work you’re doing in your community with fellow OFA volunteers.

While this manual is intended as a resource, your greatest resource in organizing at OFA will be other volunteer leaders and the staff who support them. Every volunteer and volunteer leader should be connected to our organization through a point of contact. For you, this person may be your neighborhood team leader, chapter lead, state coordinator, or mentor. As you work through this manual, work with your point of contact on how you can implement these techniques into the organizing you are doing in your community.

The organizing that OFA volunteers are doing on behalf of the issues Americans voted for in 2012 is already changing the conversation and holding elected officials accountable to their constituents. By engaging our communities on issues that matter to our everyday lives, and organizing to persuade our Members of Congress to support us, grassroots volunteers are bringing the country closer to the change it voted for. We hope that you’ll use the organizing techniques in this manual to bring your community together and make your elected representatives hear your voices, and thereby push forward making the change we voted for a reality.

Thank you for being part of the OFA family, thank you for leaning in to learn more about organizing, and thank you for continuing to propel our movement forward.

YOU
.....
ARE
.....
OFA

1

Who We Are

OFA Mission

OFA Culture and Expectations

Who We Are

You are OFA.

Organizing for Action exists because of dedicated grassroots volunteers throughout the country who are committed to organizing their communities to help achieve enactment of the agenda Americans voted for in 2012. By bringing supporters together and crafting issue advocacy strategies that are both nationally potent and locally responsive, we are building persuasive issue advocacy campaigns that move Members of Congress to support our causes.

Our mission comprises five main aspects that describe our purpose and how we achieve it:

- 1 Organize in states around the legislative agenda Americans voted for in 2012.
- 2 Build grassroots power by training and developing volunteer leadership on the ground.
- 3 Build meaningful, long-lasting and mutually beneficial coalition partnerships in states and nationally to build the progressive movement.
- 4 Develop state organizations that grassroots fundraise to self-sustain, connecting donors to activists.
- 5 Tell the story of our work.

Every part of our mission points back to the importance of grassroots volunteers in our organization. We embrace the motto “Respect-Empower-Include-Act” as the way we interact with one another as we build a sustainable, effective organization to advocate for the issues Americans voted for in 2012.

2

Building Strategic Issue Campaigns

How a Bill Becomes a Law

OFA Issue Organizing Strategy

Power Mapping

Earned Media

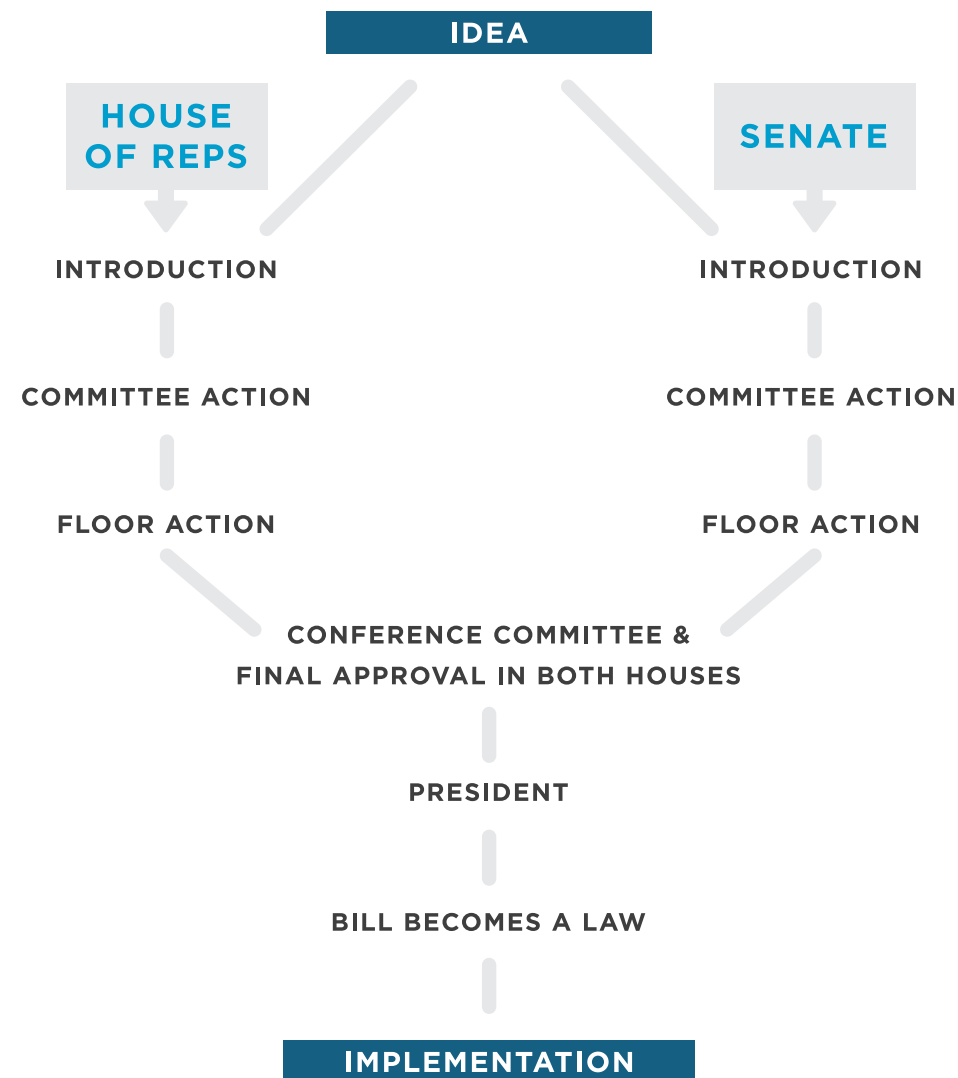
Digital Organizing

Talking About the Issues through Personal Stories

Crafting Your Local Strategy

How a Bill Becomes a Law

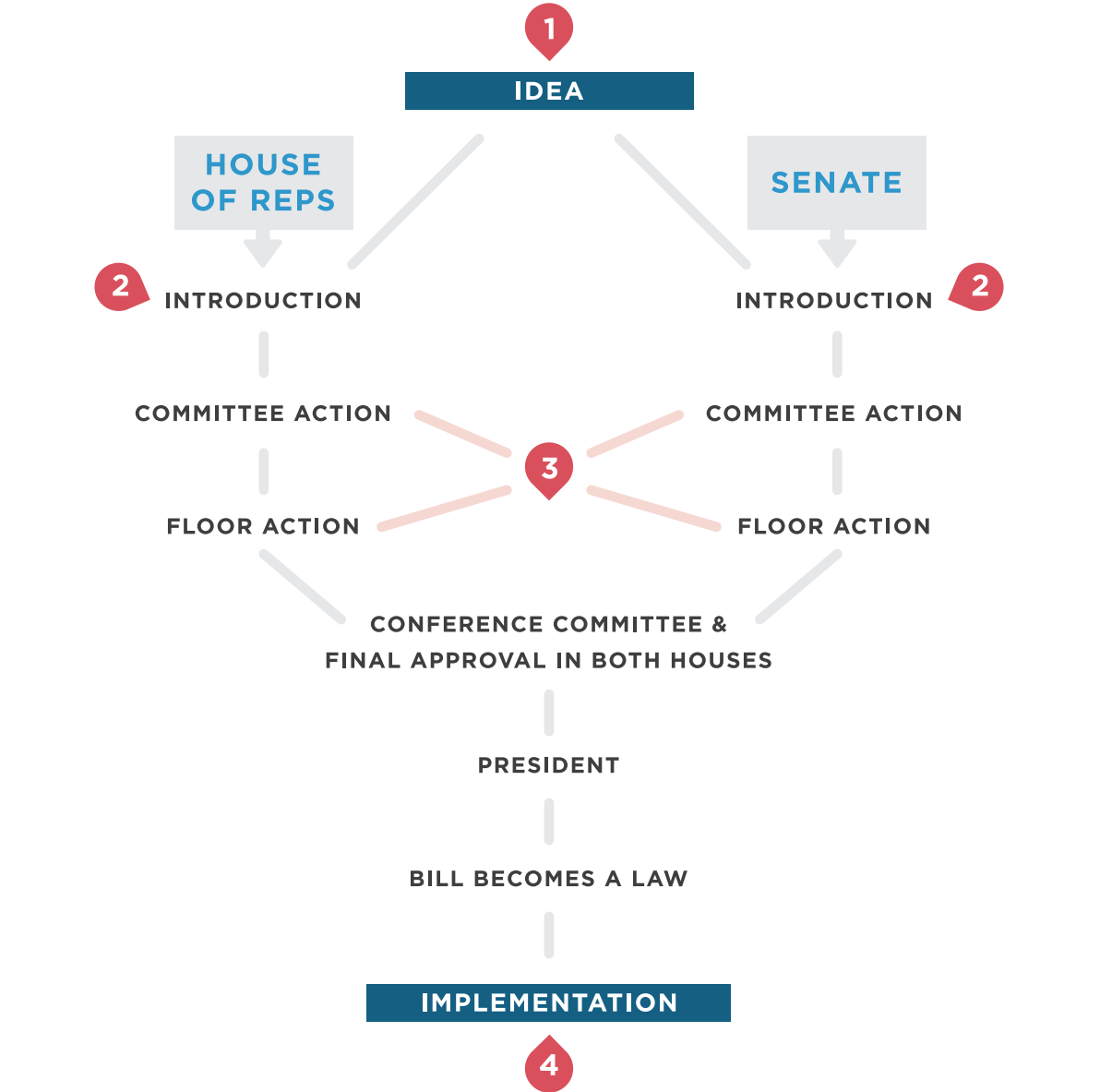
One of Organizing for Action's primary goals is advocating for bills to be passed into laws that support the agenda Americans voted for in 2012. However, before a piece of legislation becomes a law, it moves through many steps and must be supported by many Members of Congress, as well as (in most cases) the President. Before we dive into methods to organize support for legislation, let's briefly review the process of moving legislation into law.



- 1 Idea** – Every piece of legislation begins as an idea for how a problem can be solved. Ideas for legislation are born from real problems in our society that are affecting everyday Americans.
- 2 Introduction** – Once a policy idea has been studied and an approach to solving the problem formulated, a bill is drafted and introduced in either the House of Representatives or the Senate. Eventually the legislation will need to be addressed and accepted by both chambers of Congress, although the order it passes through the two chambers can vary.

- 3 Committee Action** – After introduction to each chamber, the bill is assigned to a committee according to its subject matter. The Members of Congress on the committee will research the bill, debate the bill, and hold “mark-up sessions” in which the bill is revised and amendments added. The committee will then vote whether to send the bill to the full chamber of Congress.
- 4 Floor Action** – Once the bill has been passed out of committee, it is placed on the legislative calendar. Debate is allowed on the bill, and then a vote can be taken on the bill. In the case of the Senate, because the minority recently has filibustered so frequently, often a vote of 60 Senators is required to stop a filibuster before a vote on the bill itself can be called.
- 5 Conference Committee** – Often the Senate and House approve different versions of similar legislation. Therefore, after both the House of Representatives and the Senate have approved a version of the legislation, the two versions are sent to a conference committee to be reconciled. Here Members of Congress work out the differences in the two versions of the legislation in order to draft a compromise bill. The conference committee writes a report on their compromise, and sends that report back to the floor of both chambers of Congress for final approval.
- 6 The President** – When both chambers of Congress approve the conference report, the bill moves down Pennsylvania Avenue to the White House for the President’s signature. If the President does not approve the law, he vetoes the bill and sends it back to Congress for an override. Congress can only override a Presidential veto with a two-thirds majority vote in both chambers. If the President approves of the law, he signs it into law.
- 7 The bill becomes a law** – Once the bill is signed by the President it has become a law.
- 8 Implementation** – Once the bill is a law, the executive branch is responsible for developing procedures to implement the law based on the timeline set in the legislation.

The process of moving a piece of legislation from a good idea to practical policies that can improve Americans’ lives is a long and difficult one with no single path to success. There are often sidetracks and other complications. Our organizing actions can help persuade Members of Congress to introduce legislation by highlighting problems in our society and challenge elected officials to do something about them through legislation. Once a bill has been introduced, volunteer’s advocacy can bring attention to the importance of the policy issue to the communities a Member of Congress represents, and thereby why that Member of Congress should support it. Once a law has been enacted, volunteers can help to make sure the law is successful by making its benefits clear to the public.



- 1 = Volunteers tell Members of Congress (MOC) their position on the issue and ask for action
- 2 = Volunteers let their MOC know they want legislation introduced
- 3 = Volunteers show MOC that their community supports the legislation
- 4 = Volunteers make sure the public knows about the benefits of the law

OFA Issue Organizing Strategy

In issue organizing, our goal is to see laws passed that will further the policies we believe are in the best interest of our country. At Organizing for Action, we support issues that are aligned with the agenda Americans voted for in 2012. In order to pass these laws, we must earn the support of lawmakers who vote on the measures. For federal issue campaigns, this means having support of 218 members of the House of Representatives and 51 Senators, or 60 Senators if a Senator is filibustering the bill. In order to pass the laws we care about, we often have to persuade Members of Congress to support our position. To do this, we want to make our argument to them in the way that will be most effective. Therefore, we must consider what is important to the Member of Congress as he or she is deciding how to vote on legislation.

This process of crafting an approach to affect a Member of Congress's support is what goes into devising strategy. In our organizing at OFA we define strategy as using the resources you have to amass the power you need to create the change you want.



At Organizing for Action, our greatest resource is our grassroots organizing network that shows its strength when volunteers like you come together in organizing actions. That network is particularly effective because of its knowledge of organizing skills, which is why Organizing for Action invests heavily in training for volunteers, fellows, and volunteer leaders. The impact of our grassroots network is amplified when the story of our organizing is seen by more people through avenues like the evening news, emails, tweets, or local newspapers. This is why OFA's strategy incorporates digital tools and earned media to tell the stories of our supporters.

Our power comes when we use these resources to make an argument that will be persuasive to the Member of Congress whose support we are trying to earn. In order to do this, we must consider what is important to that Member of Congress. For each Member this will vary, which is why our volunteers' local knowledge of their Members and their communities is so important.

Our challenge as organizers is to make sure that lawmakers see and hear their constituents' issue positions. In order to make that happen, our goal is to use our volunteers' organizing knowledge and energy to amplify the positions of those who support our agenda in every community. We can change lawmakers' policy positions by using our resources to demonstrate that their constituents support our agenda and why.

CREATE THE CHANGE YOU WANT

Power Mapping

As we're crafting a local strategy to move a Member of Congress to support our position, it's important to consider who are important constituencies to that Member of Congress. These constituencies may support our position or be opposed to it. They may have a lot of influence or very little. The first step in planning our strategy is mapping all of the individuals and groups interested in this issue (regardless of their stance on it), their relationship to our Member of Congress and one another, and how much power they have to persuade the decision maker.

One way to develop a visual representation of these relationships is by drawing a power map. A power map places each group of people interested in the issue on a grid and charts how much persuasion power they have.



Our grid has two axes. The vertical axis shows how much power each group has. If they are high on the grid, they have a lot of influence. If they are low, they have very little influence. On the horizontal axis we'll track if groups agree with our position or are opposed to our position. If they are with us 100% they'll be all the way on the left at position 1. If they are diametrically opposed to us, they'd be in the number 10 position. The very first person we'll want to place on our power map is the lawmaker himself. Of course he'll be a 10 on the influence scale, because he is the decision maker who can create the change we want by voting on legislation. The next question is his current position on the issue in question — is he absolutely opposed to it, neutral, or mostly supportive?

Answering this question will begin the process of doing research on our Member of Congress. We need to gather some information about our Member of Congress in order to determine his or her position on the issue and what constituencies might be influential in moving that position nearer to ours. Consider a Member of Congress in your community who OFA members want to persuade to support our issues. Do some of your own research to answer the questions in the research survey in the box on the following page. Your research may involve searches on the web, information you receive from your OFA point-of-contact, or information you learn through talking to partner groups and other supporters in your community.

Member of Congress Research Questions

.....

Issue: _____

Member of Congress (MOC): _____

Where does this MOC reside when not in Washington, DC?

What previous elected offices, if any, has this MOC held?

What was this MOC's career prior to becoming an elected official?

What is the demographic make-up of this MOC's district?

What organizational affiliations does this MOC have? Do they sit on any boards? Are there any organizations this MOC cites as critical to his or her success?

What prior actions or statements has this MOC made on this issue?

Is there any other information you feel is important to keep in mind as we work to persuade this MOC?

Once you’ve gathered information about your own member of Congress you can start building a power map for the lawmaker on this issue. As an example, we’re going to power map a fictional Member of Congress – Senator Smith from the great state of Columbiana. Here we’re going to build a power map for Senator Smith on Gun Violence Prevention. Read the information about Senator Smith:



Issue: Gun Violence Prevention

Member of Congress (MOC): Senator Patricia Smith (Columbiana)

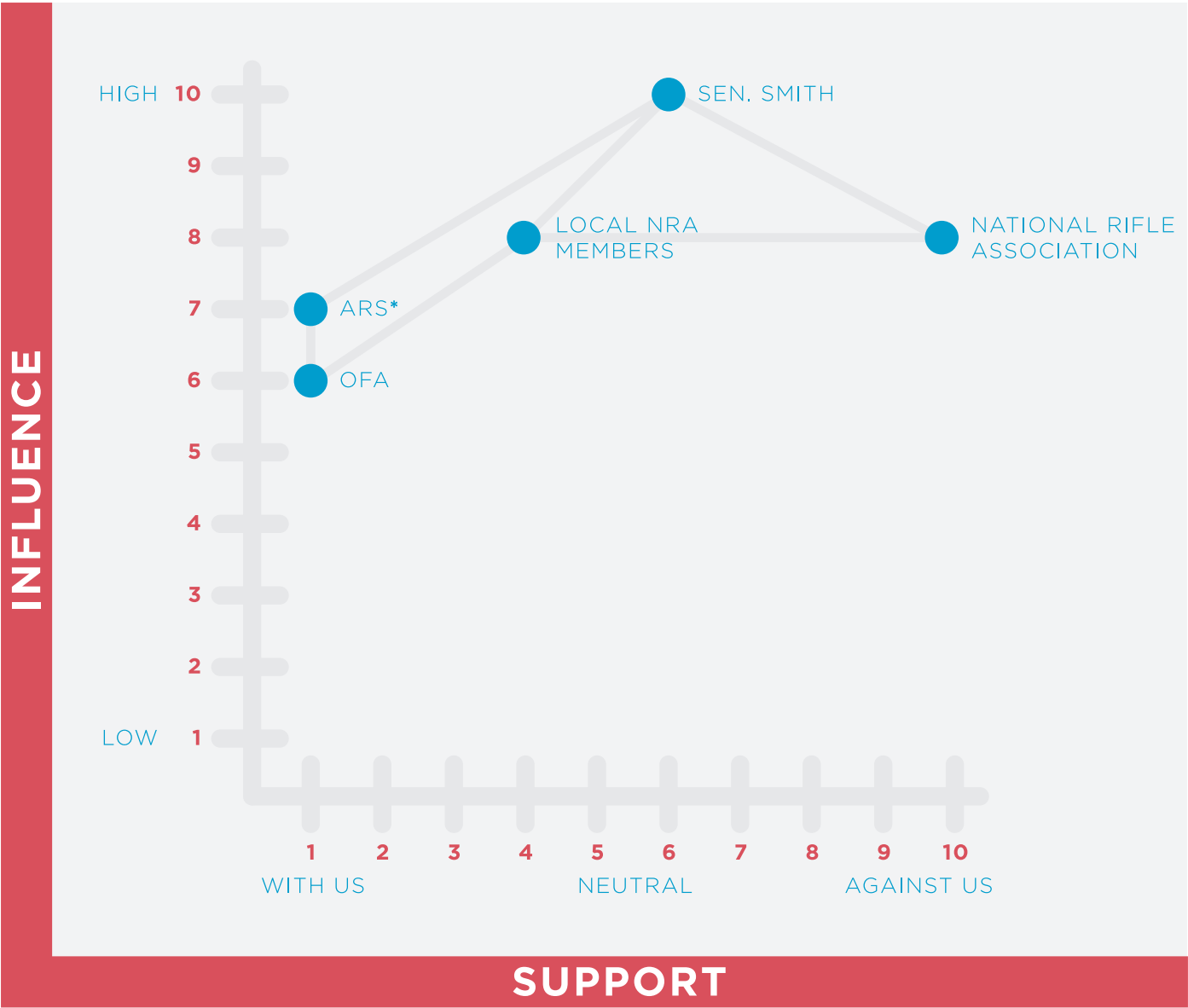
Goal: Secure Senator Smith’s vote on universal background check legislation

Bio: Senator Patricia Smith is a freshman moderate Senator from Columbiana, a state with 3 major post-industrial cities and a large farming industry outside of those cities. Before being elected to the Senate, she served as a US Representative for her home-town of Monroe, the state capital. Prior to that, she was the Director of the Freedom Institute. The Freedom Institute is a public policy advocacy and research organization that advocates public policies with emphasis on fiscal responsibility and school choice.

She currently serves on the Judiciary, Armed Forces, and Foreign Affairs Committees. She’s also the ranking member on the African Affairs sub-committee. Senator Smith comes from a family of veterans, and she often talks about her father and grandfather teaching her how to shoot skeet from a young age. She has an ‘A’ rating from the NRA and has voted in-step with them in the past. While serving in the House she had a good working and personal relationship with former Congresswoman Gabby Giffords, because they worked together on the Armed Forces committee.

After indicating she might vote yes, she voted no on the issue of background checks. Her initial comments were that she hadn’t heard enough from supporters and she encouraged survivors and others affected by gun violence to stay involved. With plummeting approval ratings and a good deal of national media, Senator Smith began stating that she is open to supporting universal background checks, and has acknowledged that her falling numbers are likely due to her vote against universal background checks.

After reading Senator Smith’s background, we can begin to put together a power map of groups who might be influential in persuading her to change her position on gun violence prevention. First, let’s place Senator Smith herself on the power map. While the Senator voted no on the most recent legislation, she’s indicated openness to gun violence prevention in the past. So let’s put Senator Smith as a 10 on the influence scale and a 6 on the support scale.



* AMERICANS FOR RESPONSIBLE SOLUTIONS

Our next step will be to brainstorm organizations that have an interest in this issue. We'll especially be considering if there are organizations that have a relationship to Senator Smith and that might express a position on this issue were we to ask them. On the issue of gun violence prevention there are some established groups who advocate on this issue: Organizing for Action, Americans for Responsible Solutions, and the National Rifle Association. Additional groups who have a stake in preventing gun violence include law enforcement, veterans groups, parents, teachers, student groups, and religious groups.

Our next step is to place organizations on the power map by assessing their position on the issue and their influence on the decision maker. See the power map for how we placed various groups. On this map, OFA is a 1 on support, but a 6 on influence. We have a large grassroots network, but Senator Smith may not yet realize that our supporters include some of her voters. However, our coalition partner Americans for Responsible Solutions is rated a 7 on the influence scale because it is led by Representative Gabrielle Giffords, and our research showed us that Senator Smith has a personal relationship with the former Congresswoman and survivor of gun violence.

Now let's look at the National Rifle Association. As an organization, the NRA is clearly opposed to any new legislation on common sense background checks, we'll place them as a 10 on the "against us" side of the axis. Also, since Senator Smith's NRA grade is so high, we can assume that she might consider them an important constituency. So let's give them an 8 on the influence scale. While the NRA as a national organization may not be changing its position, as we organize we may find NRA members in our community who support our position for common sense background checks. So let's add a group to our power map "Local NRA members" and place them as a 8 on the influence scale but on the "with us" side of the support scale.

Our final step is to consider the relationships between groups and between the groups and Senator Smith. What groups have access to Senator Smith directly? What groups have relationships with one another so that they could work together? These types of

relationships change in each state and community, so it's important to strategize with potential coalition partners to determine how your relationships could help groups work together, and thereby build a path to the Member of Congress. In this example, OFA and Americans for Responsible Solutions are coalition partners, so we know that ARS will help our members build a relationship with Senator Smith.

Now that you've seen an example of a power map, try building one for your own Member of Congress on the issue you are working on now! Use the research you did about your Member of Congress, brainstorm organizations and individuals involved in this issue, place the organizations on the power map, and then identify relationships.

Developing a power map is one of the crucial first steps to developing a strategy. Next we'll talk about some actions you and your fellow volunteers can take within an issue organizing strategy, then how you can craft your own strategy to persuade your Member of Congress on a targeted issue campaign.

Earned Media

One key tactic for using our resources to increase our power is making sure the public knows about the broad support that exists in the community for our position. Earning media coverage for our grassroots supporters allows their story to be seen across their community. Why is earned media so important when it’s the lawmaker we’re trying to persuade? Members of Congress are very attentive to the press coverage in their local news outlets because they know that such coverage both reflects opinions among their constituents and influences the opinions of more constituents.

Some earned media headlines written about OFA organizing:

ORGANIZING FOR ACTION
DELIVERS UNICORN TROPHIES
TO 135 ‘CLIMATE DENIERS’
IN CONGRESS

1

IT ISN'T
2009
ANYMORE.

2

REFORMA MIGRATORIA:
EL MOMENTO ES AHORA

3

GUN VIOLENCE PREVENTION
ADVOCATES RALLY
for
CONGRESSIONAL ACTION

4

1

huffingtonpost.com/2013/08/13/organizing-for-action-climate-deniers_n_3750126.html

2

washingtonpost.com/blogs/plum-line/wp/2013/08/19/it-isnt-2009-anymore

3

noticias.univision.com/inmigracion/reforma-migratoria/article/2013-08-05/reforma-migratoria-el-momento-es-ahora#axzz2b3imy420

4

gapersblock.com/mechanics/2013/08/22/gun-violence-prevention-advocates-rally-for-congressional-action

First, let’s make sure to define what earned media is. When we say earned media, we mean stories that run as news in the local newspaper, blog, or TV station. They are earned because we planned an event that was newsworthy in order to be covered. This is in contrast to paid media, also known as advertisements. Earned media is extremely effective in persuading constituents because news outlets are trusted sources for information. If a news outlet has reported our supporters’ stories, constituents know that they must be authentic.

Through organizing experience, we’ve developed best practices for earning media coverage for our events. When planning an earned media event there are four key elements to consider: message, talkers, location, and local connection.

Message	Remarks, Location, Signage
Talkers	Surrogate, Validator, Constituent
Location	Message, Controlled, Accessible for news outlets
Local Connection	Connects national issues to local context and increases relevance to the broader audience



Message

The message is the main idea that we’re trying to get across through our earned media event. While there might be many specific policy points that are important to our supporters within a single piece of legislation, the main message communicates why the legislation is important and its ultimate goal. President Obama has talked a lot about building an economy in which hard work is rewarded and everyone plays by the same rules. That is his message frame. Underneath that frame, he has introduced many specific policy proposals, but the message expresses the overarching vision he has for the economy that inspired the resulting policies. When we are organizing press conferences, it is important that the remarks, location, and signage at the press conference express the main goal of the positions we’re advocating. What people say and how the location looks will express in sound and pictures why the community supports our position on the issue.

Talkers

Who is delivering the message at your earned media event is important as well. At Organizing for Action, our supporters are the face of our organization. They highlight the real impact of policy issues and the grassroots nature of our movement. We can think of possible speakers at an earned media event falling into three categories: surrogate, validator, and constituent.



A **surrogate** is a person who can be considered a “local celebrity” and would attract media interest. This could be a local elected official, media personality, or sports figure.

A **validator** is a person who can speak with authority on the subject, and who your audience will consider a trusted expert. This could be a scientist talking about climate change, or a small business owner talking about the economic impact of legislation.

A **constituent** supporter is a person from the community who is impacted by the policy issue. They use their personal story to illustrate why the policy is important in the every day lives of people in the community.

A well-planned earned media event can make use of all three types of talkers in order to present community support for the policy issue from a multitude of perspectives.

Location

The location of your earned media event is important for many reasons. First, you want your location to illustrate the message of your event. If your message is “Immigration reform will be good for local businesses,” it would be a great idea to have your earned media event at a local business that will benefit from immigration reform (and have the business owner be one of your talkers). When choosing a location, you also want to consider what a photo taken of your event will look like. Often times people will just see a photo of an event without any explanation, so it’s important that a photo of your event communicates your message. It’s helpful to hold your event in a space where all of the participants will be grouped together so the location looks full. You also want to make sure that your event is not interrupted and that your agenda can run smoothly, so it is helpful to have it in a place that you have reserved and where you can control access. Finally, when you’re choosing your location, consider the reporters who you want to attend and make sure that it is easily accessible to their offices.

Local Connection

Perhaps most important when planning an earned media event is making sure it highlights a local connection. What makes stories on local news so influential to community members is that they illustrate why the issue is important to people like them. The policy issues moving through Congress are covered in the national press, but our local supporters can make it clear how the policy issue will impact each community where we organize. This makes a compelling case to the constituents in that community, and in turn motivates them to advocate for our policy agenda to their Member of Congress.

Earned media is one of the most effective issue organizing tactics for persuading Members of Congress because it amplifies our message, makes it clear how national legislation will impact our local community, and demonstrates the growing community support for our position. When we are successful in organizing earned media events, we drive the local conversation to respond to our supporters’ positions, and Members of Congress take notice.



This photo was taken at a press conference in support of the climate change campaign in Arizona. A local business owner has installed solar panels on his restaurant, and is talking about how using sustainable energy sources has a positive economic effect. From the photograph we can tell the message of the event – the signage makes it clear this is a climate event and identifies OFA’s involvement. The location is also clearly part of the message here – the press conference is outside of this local business. Our talker in this photo is the small business owner, a validator in the community because he knows about the economic benefits of sustainable energy first hand. As for the local flavor – we can see that we’re at a locally owned business and the business owner is surrounded by his neighbors. The impacts of climate change are affecting people right down at the local pizza parlor.

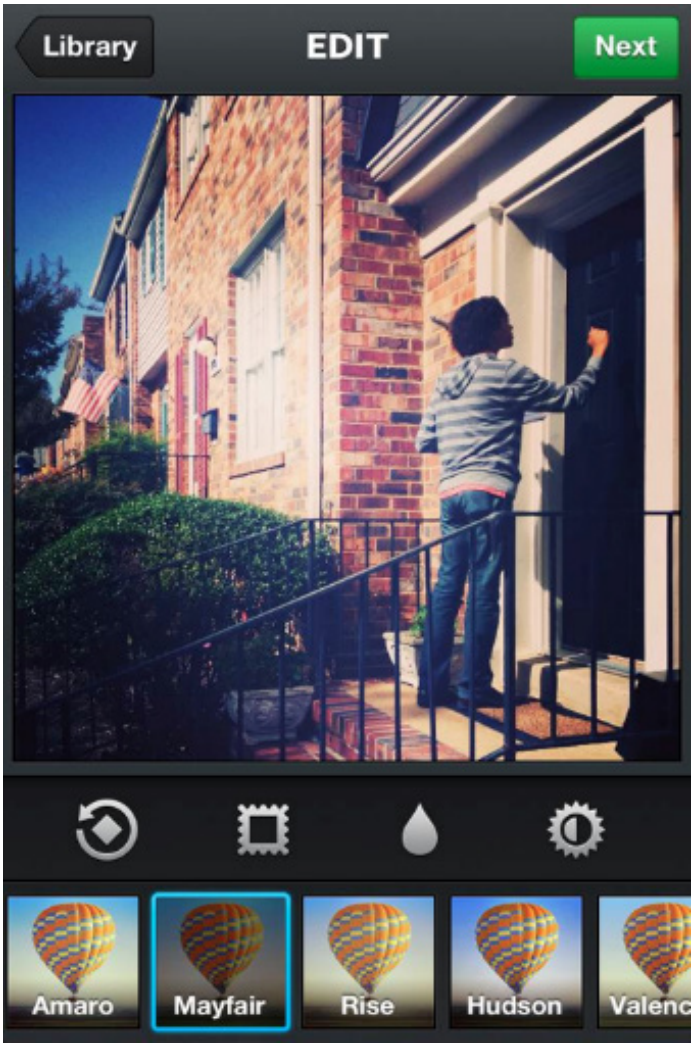
For details on the steps of putting together a successful press conference, please see the appendix page 123.

Digital Organizing

Another key tool in our organizing toolbox is using digital platforms to amplify the action our supporters are taking around a given policy. Digital organizing is important for two reasons. First, it is meeting people where they already are. Twitter, Facebook, and other social media networks are places where people are sharing content about things they care about – including politics. Second, it is a method of spreading the story of our issue campaigns that we can directly control. Sometimes despite our best efforts, no news outlet will come to our earned media event. However, if we do a good job telling the story of the action on social media through photographs and quotes, we can still succeed in getting the attention of the public and the Member of Congress we are attempting to persuade.

Photographs

No matter what social media platform we’re using, photographs are a key tool for telling the story of our grassroots supporters. Strong photos show people taking action, and convey a clear message about the issue campaign. Photographs tell the story of our movement in a single image and are compelling illustrations of our actions when shared on social media. Taking photographs at organizing events allows your OFA chapter to tell the story of what happened at the event and amplify it through social networks. One easy tool for taking and sharing photographs at events is the photo-sharing app Instagram for smart phones.



Twitter

When telling the story of organizing in real-time, Twitter can be a very helpful tool. Because Twitter is an open social network, tweets can help amplify events beyond the existing social network of OFA volunteers. For example, when OFA chapters all use a common hashtag on a day of action, Twitter users can search that topic and see reports from grassroots events around the country. Twitter can also be a useful public format for having constituents reach out directly to their Member of Congress through tweeting their story directly to the lawmaker. OFA uses the photos and stories that grassroots supporters post on Twitter to amplify the story of our movement.



Facebook



Facebook is a critical digital media tool because so many people use it to source information through the endorsement of their social network. As with Twitter, organizers can share photos, stories, and links. Facebook also allows for community building through tools like events and groups, which OFA volunteers use to invite their online social networks to be involved with OFA activities.

Telling the Story

With social media we have the opportunity to tell the whole story of the actions our grassroots chapters take. Building this narrative arc that follows the preparation, execution, and follow-up of our actions gives extra opportunities for people in our social network to engage with our organizing, and paints a clear picture of the continuous grassroots activities our volunteers are coordinating in their communities.

Digital organizing is an important tactic within organizing campaigns and it’s something that every chapter should include in their strategy on each issue campaign and action.

1

**Barack Obama** 
@BarackObama

More than 1.4 million Americans signed our petition demanding expanded background checks for gun sales—by far the most in @OFA history.


[Reply](#) [Retweet](#) [Favorite](#) [More](#)

1,052

RETWEETS

557

FAVORITES



1:41 PM - 7 May 13

2

**OFA** 
@OFA

Photo: Our volunteers getting ready to deliver 1.4 million signatures to Congress.
[#NotBackingDown](#)
pic.twitter.com/5tTpNMT4m5

[Reply](#) [Retweet](#) [Favorite](#) [More](#)



69

RETWEETS

30

FAVORITES



9:29 AM - 9 May 13

Flag media

3

**Dylan Goldberg**
@DylanGoldberg

Congress, we're ready to take action on gun violence prevention, are you?
[#NotBackingDown](#) [#backgroundchecks](#)
@OFA pic.twitter.com/T1hq8yPX6r

[Reply](#) [Retweet](#) [Favorite](#) [More](#)



33

RETWEETS

15

FAVORITES



9:22 AM - 9 May 13

Flag media

4

**Lori Haas**
@LoriHaasVA

[#notbackingdown](#) Great meeting w Congressman Thompson talking backgrounds checks
pic.twitter.com/GLlv3fNhxH

[Reply](#) [Retweet](#) [Favorite](#) [More](#)



9

RETWEETS

7

FAVORITES



10:00 AM - 9 May 13

Flag media


5

A conversation with Senator Flake
By Pam Simon on May 9, 2013

[Like](#) 385 [Tweet](#) 50 [Email](#)

As a former member of Gabrielle Giffords' staff and a survivor of the Tucson shooting, I'm on Capitol Hill today with a great group of fellow Organizing for Action volunteers, delivering petitions from supporters all across the country in support of common-sense gun violence prevention. We've been making the rounds, including meetings with Senator Dick Durbin and Representatives Nancy Pelosi and Mike Thompson.

It had been a really productive morning and we were on our way down the escalators out of the Capitol when I saw my senator, Jeff Flake, walking up the stairs right in front of us.



6

**OFA** 
@OFA

OFA volunteers & victims of gun violence delivered 1.4 million signatures to Congress.
Watch: OFA.BO/uiwb4P [#NotBackingDown](#)

[Reply](#) [Retweet](#) [Favorite](#) [More](#)



OFA volunteers deliver 1.4 million signatures to Congress
More than 1.4 million Americans signed Organizing for Action's petition demanding that Congress pass common-sense gun violence prevention. You should join th...

[View on web](#)

37

RETWEETS

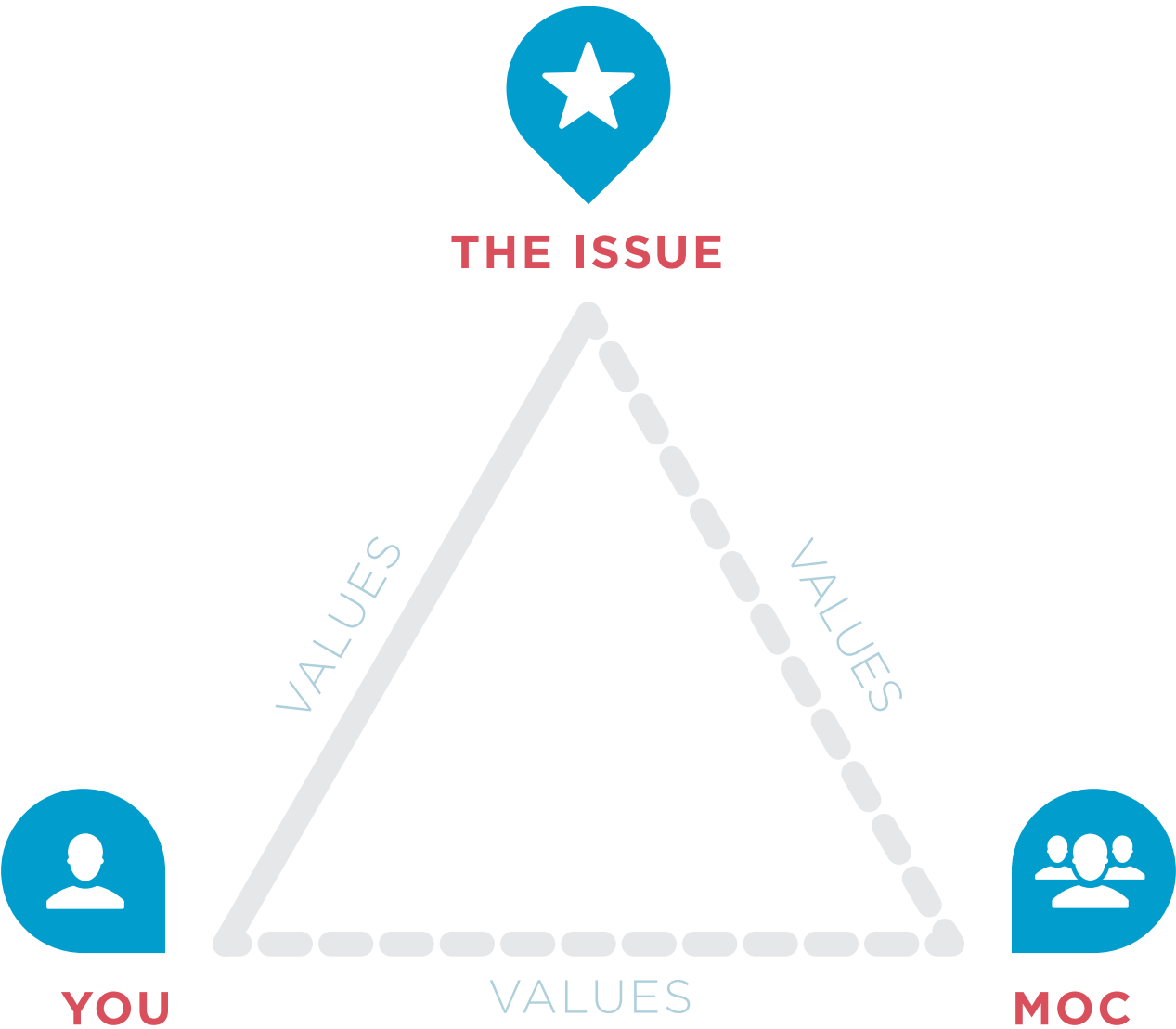
13

FAVORITES



Talking About the Issues through Personal Stories

One of the most powerful tools we have as organizers is our own personal story. Each of our grassroots volunteers joined Organizing for Action because they have a personal connection with the policy agenda we’re advocating. That connection has its foundations in that supporter’s values and real life experience of how progressive policy can improve the lives of people like him or her. Whether we’re organizing earned media events, telling our story digitally, or talking to friends and neighbors, the personal stories of our supporters — rooted in universal American values — make the most persuasive case for the importance of our policy agenda.



We use personal stories to build connections between the community and the policy issue, the community and its Member of Congress, and ultimately between the Member of Congress and the policy issue. Our supporters already have a strong connection to the issue. When they talk about their personal reasons for supporting the issue they build a connection with the community, which helps to build community members’ connection to the issue because they see how it can affect their lives. When community members within the Member of Congress’s core constituencies are reaching out to the lawmaker telling their personal stories about why the policy will help people like them, they build a positive connection between the Member of Congress and the issue. All of these connections are based on values — the principles that our supporters believe are just and wise ways for our country to govern itself.

Through past experience in issue organizing, OFA has developed a four-step process for effectively sharing the message of our issue campaigns through the personal stories of our supporters. The first step is to **acknowledge and relate**. This means making an assessment of your audience and your shared concerns about the current problems facing our nation. The next step is to talk about **values**. Consider what values you share with your audience that led you to support this policy issue. Share a story from your life that illustrates how this policy reflects the values you share. The more specific and detailed the story is, the more effective it will be at illustrating why your position is compelling – use your story to paint a clear picture of the problem that this policy change can solve. The next step is to **pivot to supporting arguments**. This is the time to lay out the key facts about the policy that will help address the problem you’ve identified, and are in line with the values you’ve described. Finally, complete your story by drawing **contrast**. Here you illustrate what will happen if the Member of Congress does not support this policy and how it will hurt people in your community.

PROBE

ACKNOWLEDGE & RELATE

ACKNOWLEDGE THE PROBLEM OUR NATION FACES AND RELATE IT TO YOUR AUDIENCE. OTHERS WILL DEFINE THE PROBLEM DIFFERENTLY TO PERSUADE THE PUBLIC THAT THEIR SOLUTION IS THE BEST FOR THE COUNTRY.

PROBE

VALUES

BRING THE CONVERSATION TO THE VALUE THAT YOU SHARE WITH THE AUDIENCE, AND CONNECT THAT VALUE BACK TO THE ISSUE.

PROBE

PIVOT TO SUPPORTING ARGUMENTS

PIVOT TO KEY FACTS OR ARGUMENTS IN SUPPORT OF THE VALUES YOU LAID OUT.

PROBE

CONTRAST

DRAW THE APPROPRIATE CONTRAST WITH THE STATUS QUO. WHAT WILL HAPPEN IF WE DON'T MAKE A CHANGE?

PROBE



For every event where you're speaking about OFA policy issues — whether in a press conference, tweet, personal conversation, or letter to your Member of Congress — consider how you can communicate OFA's position on the issues through your own personal story. Begin to plan your personal story on the next page!

Issue Topic: _____

Message you’re trying to convey: _____

Event: _____

Target Audience: _____

Acknowledge & Relate: For your target audience, what do you think they perceive as the biggest problem related to this issue? What story from your own life can you tell that illustrates the problem?

Values: What values do you share with your audience related to this issue? How can you relate your story to these values?

Pivot to Supporting Arguments: What are the key points about the policy issue that you want to communicate? How will they answer the problem you’ve defined?

Contrast: What will be the consequences if your Member of Congress does not support this policy issue?

Crafting Your Local Strategy

For each issue campaign, Organizing for Action develops a strategy for how to gain support from 60 Senators and 218 Representatives in the House. By acting with a coordinated national plan, we can make the most of our grassroots power to advocate for the agenda Americans voted for in 2012. However, you will be the expert on your local community, so our volunteer leaders are empowered to craft a local strategy that will move their own Member of Congress to support our issues.

When developing a local strategy on each issue, OFA volunteers use research and power mapping to first assess their resources and opportunities to build grassroots power. Then they choose what actions will make the best use of their resources to have the biggest persuasive impact on the Member of Congress. Here are some questions to consider when working with other volunteer leaders to craft local strategies:

- 1 What is the CHANGE we want on this issue? What specific decision do we want our Member of Congress to make?
- 2 What RESOURCES do we have? Think about both people and tangible things.
- 3 How can we turn those resources into POWER to motivate this Member of Congress to make the decision we want? What organizing techniques will we use?

Below are some organizing techniques that will be discussed in detail in later parts of this manual. These techniques can be utilized as part of your local strategy to persuade your Member of Congress.

- [Press Conferences](#)
- [Letters to the Editor](#)
- [Pledge-to-Call Drives](#)
- [Member of Congress office visits](#)
- [Digital Amplification](#)
- [Blizzarding](#)
- [Petition & Pledge Card Drives](#)

3

OFA Chapters and Teams

- Why Chapters and Teams
- History of the Chapter Program
- Chapter Responsibilities and Phases of Development
- Chapter Structure
- Chapter Role Descriptions
- Team Responsibilities and Phases of Development
- Team Structure
- Team Role Descriptions
- Testing and Confirming Leadership

Why Chapters and Teams

Organizing for Action was founded as a grassroots organization — our mission is to empower volunteers in their community to work together to advance the agenda Americans voted for in 2012. Experience in organizing has shown that grassroots organizations accomplish more when volunteers work together in structured groups, take on positions of leadership in those groups, and assume responsibility for the success of our organization at the local level.

Working within this kind of structure gives volunteers ownership over the implementation of OFA strategy in their community. As a result, they invest more time, work more efficiently, and are more effective at delivering the message of the organization in their community — it’s more fun and more rewarding! This structure also leads to better results because volunteers develop expertise in their specific areas of responsibility, build personal relationships that strengthen organizing ties, and can lead larger organizations directed by volunteer leaders.

State Level	Headquarters communication Resource management Allied organization coordination
Chapter Level	Leadership training Large scale media events Issue campaign leads
Team Level	Smaller scale, local execution of issue campaigns Contribute to chapter-wide actions Action-based training

The Organizing for Action structure in each state is divided into three levels: the state level, the chapter level, and the team level. Headquarters consults with state level leaders on issue campaign strategy. Those leaders tailor the national strategy to be appropriate to their state, manage resources, lead coordination with allied organizations, and provide support to volunteers in the state. Each state will have multiple chapters, which coordinate earned media events, customize the issue campaign strategy for their respective areas, and provide leadership training for developing volunteer skills. Additionally, chapters will often have members organized in multiple teams. Teams are generally formed on the basis of neighborhood affiliation. They contribute to the activities of their chapter — coming together for chapter-wide events and projects — and execute more localized organizing actions in order to bring new volunteers into the organization.

History of the Chapter Program

Organizing for Action models its grassroots structure after the Neighborhood Team Model used effectively since 2007 and 2008 by organizers facing nearly insurmountable challenges and limited staff and resources. As the neighborhood team model took shape, leaders in states like South Carolina placed the responsibility of a paid organizer into the hands of volunteers, who were trained and empowered as leaders of the organization. The neighborhood team model placed ranks of highly skilled and experienced volunteers at the top of the organization's structure.

As Organizing for Action was determining what our volunteer structure should be, our guiding principle was that “form should follow function.” We knew we would fail as an organization if our structure was built in a room in D.C., and not out of the lessons learned in the states through action. So states began organizing and developing their structures to fit the needs they were encountering in diverse communities across the country. Organizing for Action's chapter and team structure was developed from the work of pilot chapters through days of action, community service, trainings, successes and missteps. It reflects the structure that best accomplishes our issue organizing goals while empowering volunteers to be leaders in their communities.

Chapter Responsibilities

Each state has developed its chapter boundaries according to the unique needs and resources in that state. The responsibilities of a chapter vary as well depending on its local strategy for each issue campaign. However, all fully developed chapters are expected to accomplish the below:

- Facilitate bringing multiple neighborhood teams together to effectively earn media coverage in a given media market.
- Ensure neighborhood teams are working effectively and efficiently together to ensure sustainability.
- Build and maintain relationships with press contacts and partner organizations.
- Facilitate programmatic fundraising at both the chapter and team level.
- Facilitate and manage SmartVAN for neighborhood teams, including training and data management.
- Facilitate, train and manage chapter social networks and digital content. Serve as an example of how to integrate digital amplification for teams and volunteers.
- Facilitate training within chapters and neighborhood teams.

Chapter Role Descriptions

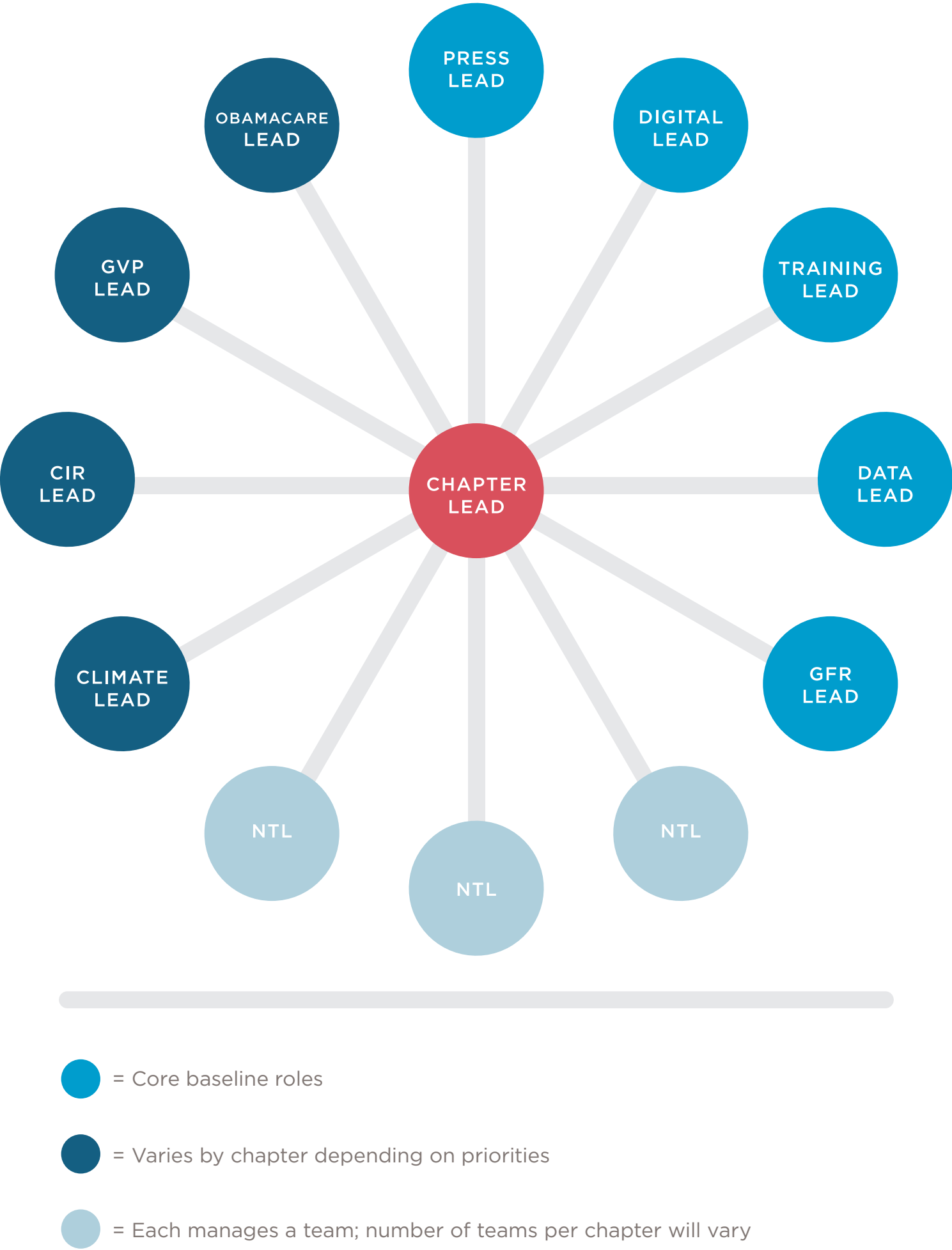
In order for each chapter to fulfill all its responsibilities, it is essential that it develops volunteers to take on leadership roles within the chapter. Following the principle of form-follows-function, each state and chapter may define leadership roles and structure differently. The following are examples of some of the roles a developed chapter assigns to volunteer leaders:

ROLE	RESPONSIBILITIES
Chapter Lead	Communicates with statewide leadership and links actions to the Team Leaders. Chapter leads oversee the issue campaigns at a chapter level, and ensure the other leadership roles at the chapter level are working together. They ensure other roles at the chapter level receive the resources, guidance, and training they need. They also mentor neighborhood team leaders.
Fundraising Lead	Ensures fundraising goals are met at the chapter level. They coordinate fundraisers, and work with team-level fundraising captains to hit their goals and provide resources and training to ensure success.
Training Lead	Ensures that training needs are met at the chapter and team level. Needs of the organization may include but are not limited to coordinating the chapter’s fellowship program, securing resources, creating trainings on programmatic tactics and strategy, evaluating and strengthening chapters and teams through ongoing training programs, and assisting with education around new issue initiatives.
Data Lead	Oversees data needs at a chapter level, including providing chapter and team level reports. Data leads also provide training for data captains at the team level, in order to ensure the right lists of volunteers and prospects are being engaged and that all data captured is being entered back into SmartVAN to strengthen the database.

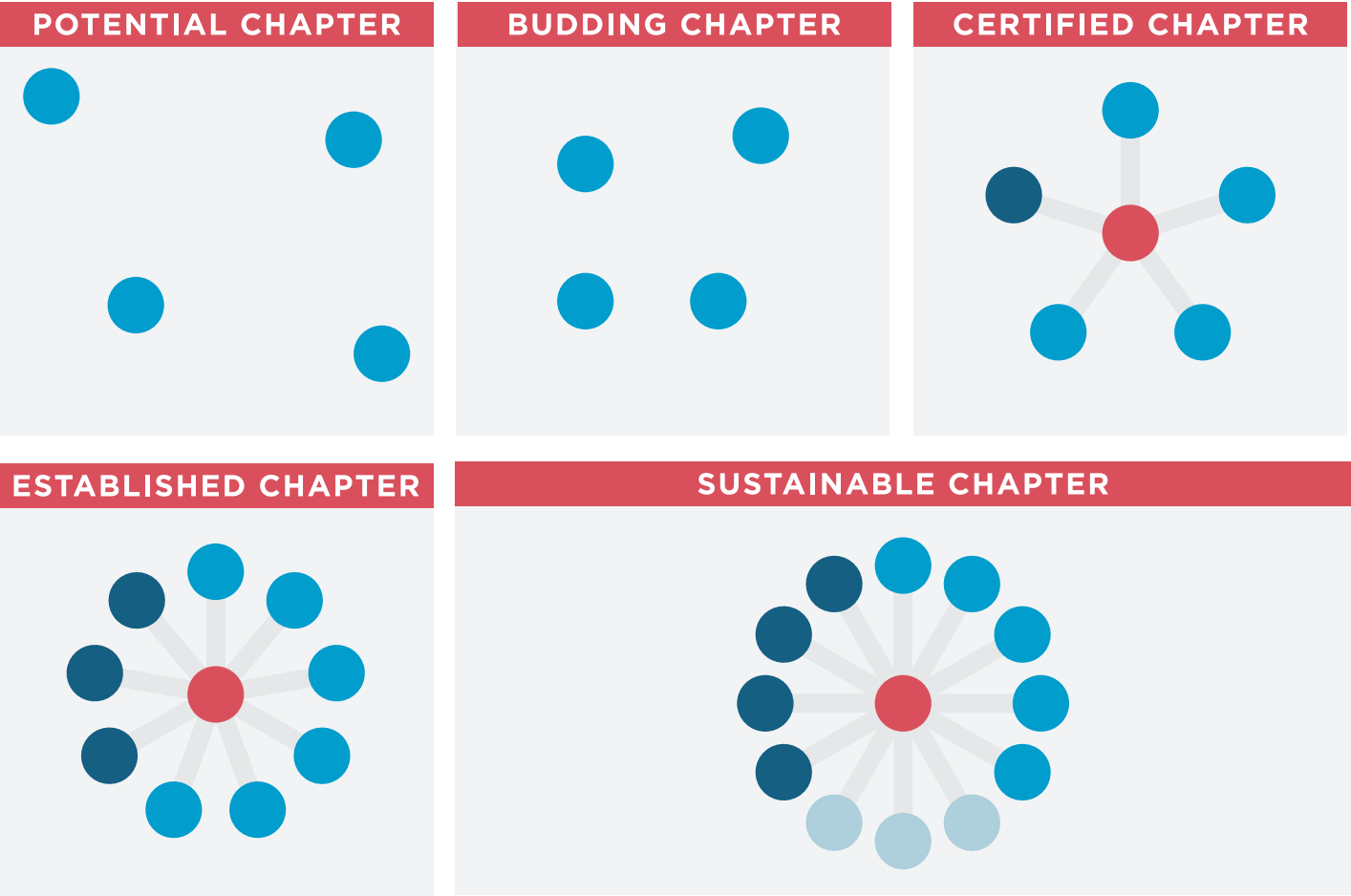
ROLE	RESPONSIBILITIES
Digital Lead	Trains team-level digital captains to guide their volunteers to take photos and use social networks. They also compile information and make sure content is getting collected and posted.
Press Lead	Handles relationships with press outlets at a regional level. They build relationships with press and connect them to a chapter’s actions. Tasks include sending out press advisories, making press calls and wrangling the press during events.
Issues Lead	<p>Provide materials, training, and guidance to teams about each issue campaign in a timely fashion. They manage relationships with other organizations on their designated issue at a chapter level. If a team has an issue captain, the lead will work directly with them on team strategy and tactics. Depending on region and state, some or all of these issue leads will be necessary:</p> <ul style="list-style-type: none">• Gun Violence Prevention Lead• Comprehensive Immigration Reform Lead• Climate Change Lead• Obamacare Lead• Women’s Issues Lead• Budget/Economy Lead

Chapter Structure and Development

In order to coordinate so many people fulfilling so many organizing responsibilities, it’s important that chapters have a clear communication and leadership structure. OFA chapters follow a snowflake organizational structure, where a chapter lead coordinates the work of all the other leaders in the chapter.



Of course, chapters must grow into the fully developed snowflake described above. In order to grow, chapters use their organizing actions to identify, train, and develop leaders to take on specific responsibilities in the chapter. We call this process moving through the phases of development.



Phase 1 (Potential): Volunteers and volunteer prospects exist, but are not working together to carry out any of the functions of a chapter.

Phase 2 (Budding Chapter): Volunteers are working together and have identified a common desire to form a certified chapter. Some volunteers are serving as point people on various responsibilities, but none have official roles or titles yet.

Phase 3 (Certified Chapter): Volunteers are working together and have received chapter certification. Through demonstrating their ability to carry out the responsibilities associated with various roles, many volunteers within the chapter hold the title of Lead. Four of the six core lead roles are filled, and at least one Issue Lead role is filled.

Phase 4 (Established Chapter): Volunteers are working together, have received chapter certification, and are successfully carrying out at least 90% of the functions of a chapter. All six Core Lead roles as well as all Issue Lead roles needed for that chapter are filled with tested and trained leaders who have demonstrated their ability to successfully carry out the responsibilities associated with that role.

Phase 5 (Sustainable Chapter): Volunteers are working together, have received chapter certification, and are successfully carrying out all of the functions of a chapter. All six Core Lead roles as well as all Issue Lead roles needed for that chapter are filled with tested and trained leaders who have demonstrated their ability to successfully carry out the responsibilities associated with their role. In addition, a Sustainable Chapter also houses at least three neighborhood teams who take ownership over different projects and recruit new volunteers and leadership prospects within their chapter turf.

What happens after Phase 5 for Chapters?

Once a chapter has reached Phase 5, it should be able to remain at this phase of development indefinitely. This is because the team and leadership structure makes for a sustainable organization where no one person or group is carrying out all the responsibilities of the chapter. Additionally, understanding that no individual will stay in the same role forever, this model allows for new leaders to emerge through the team structure to replace leads who drop off over time. Once the chapter has filled all its roles, chapter leadership should focus on creating a pipeline of prospective new leaders who can emerge from neighborhood teams. Chapter leadership should hold regular trainings that allow for these leaders to emerge, and should coach Neighborhood Team Leaders through the process of identifying, testing and training new leaders.

Team Responsibilities

Neighborhood teams within chapters provide a smaller, more local unit for volunteers. As such, neighborhood teams provide a pathway for volunteer prospects to get involved with OFA right in their own community. Teams take on many responsibilities relating directly to executing local organizing actions. These include:

- Inform and communicate strategy and tactics to volunteers.
- Ensure the message and tactics of OFA issue campaigns are tailored to the community.
- Work with surrounding neighborhood teams to pool resources when necessary to execute earned media events.
- Provide a point of entry for people who want to make their voices heard on issues.
- Ensure volunteers are trained to carry out organizational strategy and tactics.
- Create a pipeline for identifying and training new leaders.
- Provide local stories and features to highlight on chapter and state social networks like Facebook and Twitter (in addition to personal social networks).

Team Role Descriptions

Because the neighborhood team’s functions differ from that of the chapter, it has different types of leadership roles. Also note that leadership roles within a neighborhood team are designated as “captains,” while leadership roles with a chapter are designated as “leads.”

ROLE	RESPONSIBILITIES
Neighborhood Team Leader (NTL)	Is the link between the chapter lead and the team captains. Helps organize the tactics necessary for success at a local level. They also ensure their team captains receive the resources, guidance, and training they need to carry out their roles successfully.
Phonebank Captain	Oversees all phonebank activities from a team. They ensure and oversee volunteer recruitment for phonebanks, and also make sure materials are prepped, volunteers are trained and results are reported.
Data Captain	Oversees all data activity. This includes prepping data for action events and trainings, and ensuring data is entered into SmartVAN once captured. They are trainers for SmartVAN on their team.

Team Structure and Development

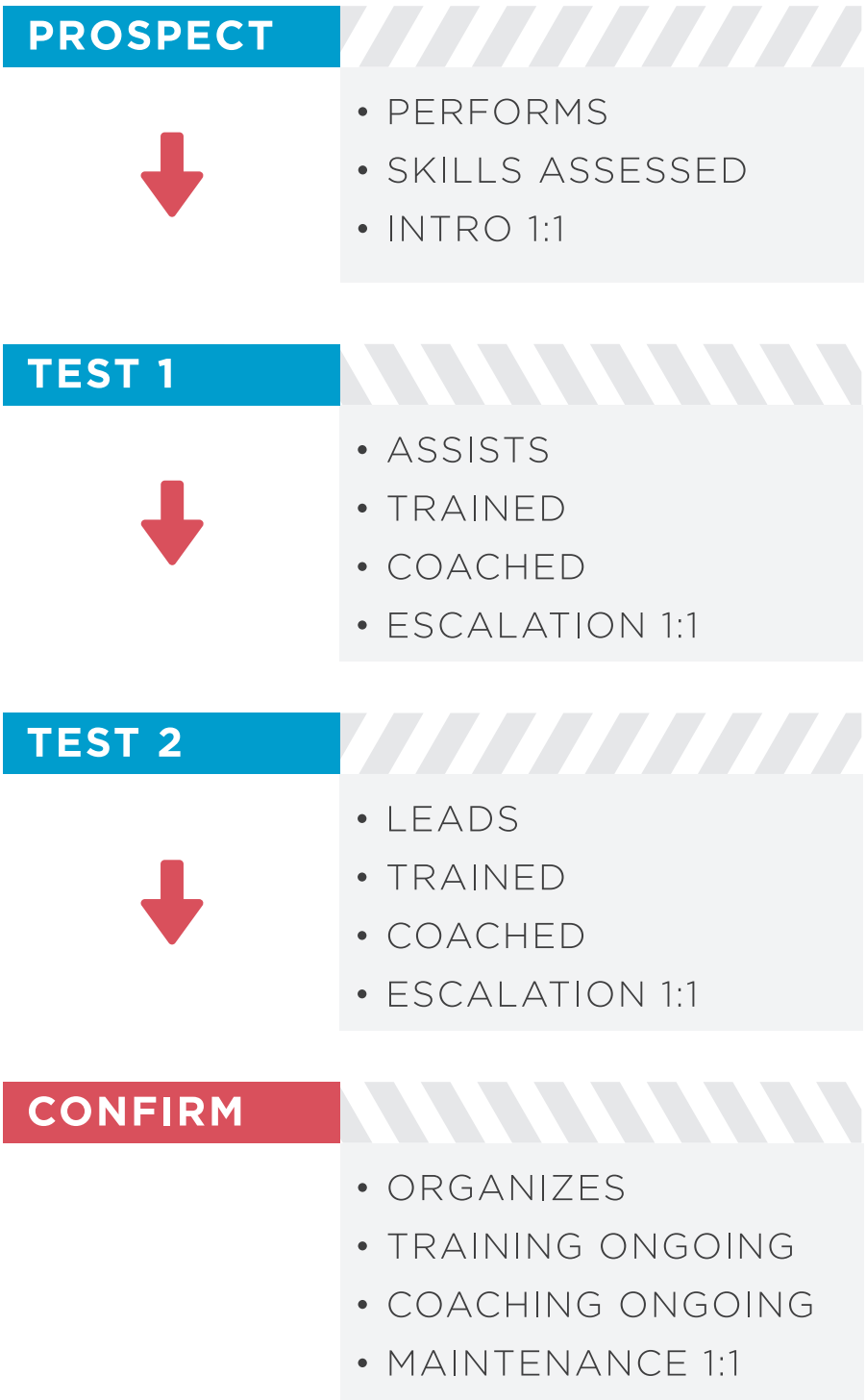
Just as with chapters, it takes neighborhood teams time and effort to develop the capacity to fulfill all their responsibilities. A neighborhood team is also structured as a snowflake, with the Neighborhood Team Leader in the middle as a coach and facilitator for the work of all the team captains.

Neighborhood teams develop through similar phases as chapters. As teams take more actions, they are able to test and develop volunteers to take on more leadership functions within the team. As more volunteers become captains, the team is able to fulfill more of its responsibilities. Team captains also provide a pipeline of leaders that can take on roles at the chapter level.

Testing and Confirming Leadership

In OFA’s organizing model, volunteer leaders are given a great deal of responsibility for developing and executing our local organizing strategy and managing other volunteers. Because of this, it is important that volunteer leaders have been prepared for their responsibilities and have agreed to carry them out. It is also important that they have demonstrated their aptitude and dedication to the role before earning a leadership title. This is why we test and confirm leaders before entrusting them with a leadership role in our chapters or teams.

When new volunteers get involved with OFA, organizers consider what responsibilities would be good for them to take on within the local organization. They then identify the volunteer as a prospect for that role. Then the prospect goes through a testing period where they progress from participating events to running them, and when successful, are officially asked to take on a leadership role. When they choose to accept the role, they are confirmed as a volunteer leader in OFA.



OFA has found that testing is most effective when it is measurable and specific to the role the prospect may fill. For example, it doesn't make sense for a Press Lead prospect to run a phonebank, but it does make sense for a Press Lead prospect to assist in outreach to press and send advisories for a phonebank. One of the best ways to prepare a prospect to be successful in a leadership role is debriefing on the most recent test and training them for the next test. After a prospect has been confirmed into their new leadership role, it will be important for them to receive more specialized training and coaching in their role so they are well prepared to take on their new responsibilities successfully.

In Organizing for Action's model, leadership titles are always earned. Volunteer leaders have demonstrated their aptitude and willingness to take on the responsibilities required of their role. OFA organizers have in turn made a commitment to the volunteer leaders to provide them the resources, information, and skill training necessary for them to successfully fulfill their responsibilities.

APTITUDE

&

WILLINGNESS

4

Methods for Building Capacity

Relationship Building and Our Movement

Personal Story

1:1 Meetings

House Meetings

Trainings

Grassroots Fundraising

Metrics Driven

Organizing for Action chapters and teams continuously have two priorities in their organizing — to achieve the goals of our issue campaigns, and to build their local organization by recruiting new volunteers and developing them to take on leadership roles. The methods in this section focus on how to bring new people into our movement, integrate them into the actions of the chapter, and prepare them to take ownership of organizing responsibilities.

Relationship Building and Our Movement

Relationships are the bedrock of organizing. You can think of each individual in a community like a thread. If the threads have no relationship with one another, they are very weak. If a fabric were woven from the threads but the connection between them was not very close, then the fabric would easily tear. However, if the fabric is woven so that the threads are very close and very tight, then the fabric will be strong. Relationships in organizing weave the individual people in our movement closer together, and combined they are much stronger than they could ever be alone.

When volunteers build relationships they help new supporters connect with the issues we care about and commit to our strategy for advocating for them. Relationships help volunteers commit to each other and keeps them engaged, even when things get tough.

As an organizer, you have to work to develop relationship with your volunteers, but you also have to facilitate relationship building between volunteers. As a result, when we talk about relationship building, we actually think about it in a couple of different “directions.” The tactics we use to move chapters and teams through the stages of development will always either help them connect to the organizer “vertically,” or connect to each other “horizontally.”

Let’s briefly review the tactics we use to relationship build vertically (between you and potential volunteers/team members) and horizontally (amongst potential volunteers/team members). Take a shot at guessing whether each of the tactics described on the next page builds mostly horizontal relationships or mostly vertical relationships. We’ll dig deeper into these tactics later on in this section.

TACTIC	DEFINITION	MOSTLY VERTICAL?	MOSTLY HORIZONTAL?	WHY?
One-on-One Meetings (1:1s)	An intentional, pre-scheduled meeting with a volunteer or a potential volunteer to discuss work to be done or check in on work that’s being done. If it’s an introductory 1:1, you share stories and make an ask for the person to get involved. If it is a maintenance 1:1, you can check in on progress to goal. Escalation 1:1s move people into a new role or help them take on a new challenge.			
House Meetings	A meeting of five or more volunteers or potential volunteers. A house meeting occurs in a volunteer’s house and usually lasts an hour and a half to two hours. It contains a social component, discussion about how to take action in the community to achieve a specific goal, and next steps.			
Skills trainings in small or large groups	Trainings have set agendas, goals, and visual materials where we intentionally: build relationships, teach important skills, gain buy-in to our strategy, and provide ample opportunities for participants to practice in a safe setting. The length of a training varies.			
Action Planning Sessions	Weekly, bi-weekly, or monthly meetings where core teams (and sometimes additional prospects or volunteers) come together to get caught up on progress to goal and strategize/plan for the future.			

Now, take a moment to think about some activities focused on moving our issue campaigns forward. Much of our local strategy will focus around actions like the below. How can you ensure that everything we do with volunteers and teams provides relationship-building opportunities, even issue advocacy events?

TACTIC	HOW COULD YOU ENSURE THIS IS A VERTICAL RELATIONSHIP BUILDING OPPORTUNITY?	HOW COULD YOU ENSURE THIS IS A HORIZONTAL RELATIONSHIP BUILDING OPPORTUNITY?
Press Conferences		
Blizzarding		
Pledge-to-Call Drives		



OFA

Personal Story

All of us have a personal motivation for deciding to dedicate our time and energy to organizing around progressive policies. As sound as a policy initiative may be, its real meaning is the difference it can make improving people’s lives in communities across the country. Your personal story will build a connection between the policy vision that Americans voted for, constituents, and potential volunteers in your community. You are the messenger for our movement! It is within each of us to make this connection, to illustrate and bring to life the real stories and impacts this policy agenda will have on everyday Americans.



Why Do We Use Personal Stories?

Which statement impacts you more:

- 1 The Affordable Care Act is providing an opportunity for more than 30 million uninsured Americans to get access to affordable health coverage and has eliminated discrimination against children and adults with pre-existing conditions.

Or...

- 2 Obamacare assures all Americans that they can have access to health insurance; this was important to someone like my dad who has a rare heart disease and needs an expensive medication to keep him alive. We were always worried if he changed jobs that he wouldn’t be able to get on a new insurance plan because of his pre-existing condition. Now we know that he’ll always have the right to purchase medical insurance.

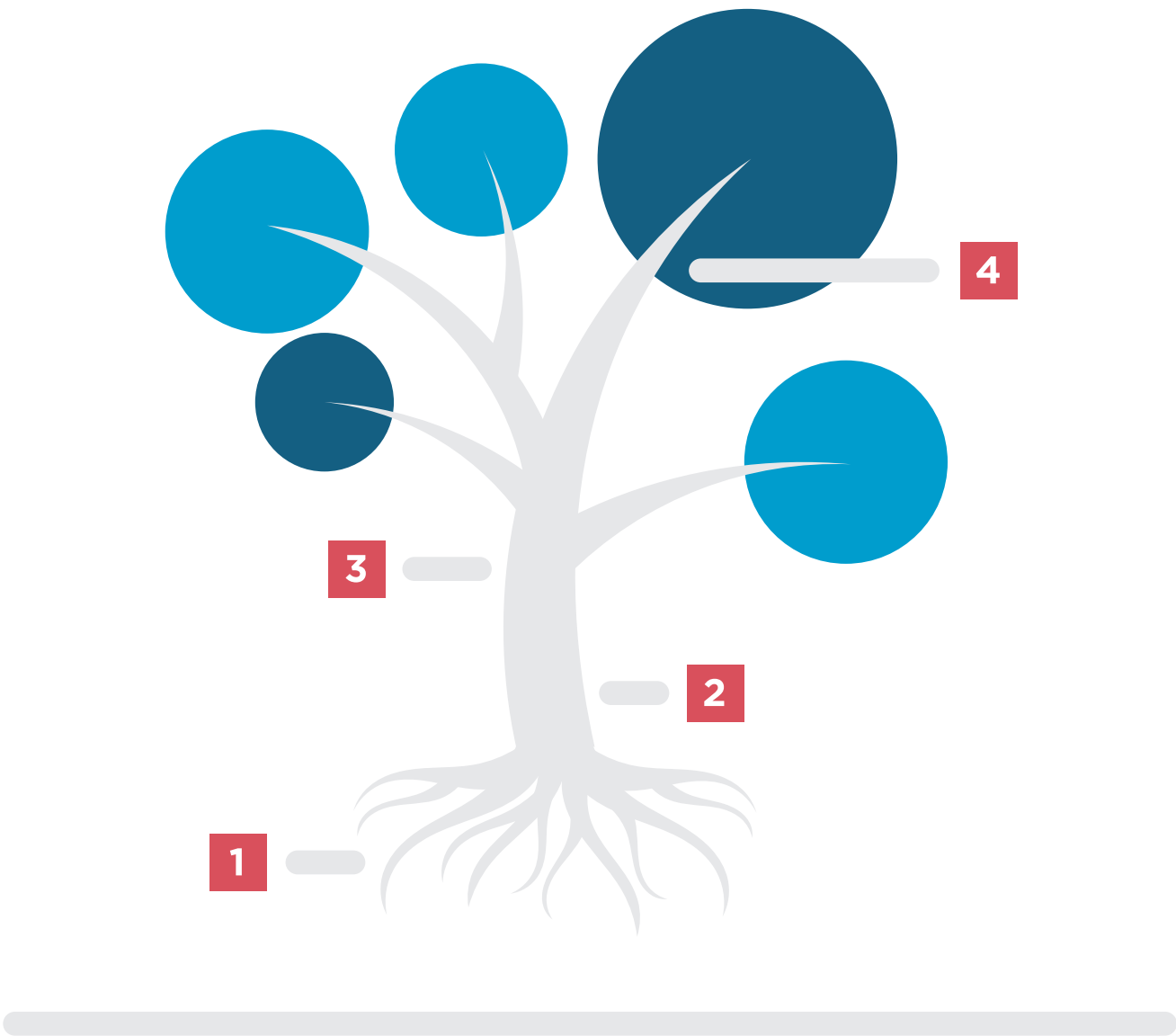
Through the telling of personal stories, our issue campaigns become less about complicated, abstract policy and more about real life. Personal stories are a way of connecting with other volunteers, neighbors, coalition partners, and friends. When we share our motivations, our challenges, our decisions and their impacts, we tap into a more human place and we begin to build a relationship. Building these relationships with as many constituents and potential volunteers as possible helps us drive the narrative on why our position is important for our community, and builds our power to persuade our Members of Congress to support our agendas.

Telling Your Personal Story

In this movement, personal stories are a foundational piece of our work. This movement is about neighbors talking to neighbors and, through personal stories, we make connections to our own motivations for action on behalf of the policy issues we care about. This tool is a core element of how we build chapters and teams because organization building is all about relationship building. It is also how we connect with constituents — by relating to their concerns and connecting over shared issues and values.

As a volunteer with OFA, you will be asked to use personal stories in various ways and contexts, but most often your story will be the base of your volunteer recruitment efforts and constituent outreach activity.

We think of our personal story like a tree — the roots connect us to our values and formative life moments, the base is our anchor to organizing, the trunk helps us build connection, and the branches are the many ways we can use our personal experience to reach out and touch others. Using this image of a tree, we’ll talk about how you can develop your own personal story as a tool for organizing.



- 1** = **roots:** strong foundation of personal motivations, issues, and key life moments
- 2** = **base:** your core story; the anchor from which you will build other stories
- 3** = **trunk:** asking questions and listening, so you can make a connection between you and the listener to build a relationship
- 4** = **branches:** the various issues, constituencies, and different ways that you will connect with people

Phase 1: Understand the Foundation: Story Tree

All of us have roots—experiences and values that make us who we are. The story tree helps us visualize how we develop, use, and interweave our stories with those of others.

Phase 2: Understanding your Roots

Everyone has many personal stories. Finding your stories requires reflecting back on a key moment of your life when you were motivated to action, made a decision to get involved, or made a choice that turned your life in a different direction. As a leader, you must familiarize yourself with your own motivations so you can use that passion to motivate others. Take a few minutes to reflect on this. This will become the root foundation of your personal story.

Why have you volunteered with OFA? What motivated you to take action? Reflect on what brought you here and what life moments influenced you.

Next, think about the issues that resonate with and motivate you. Being able to connect your issue interests with your life experiences is a key tactic for illustrating why the OFA agenda is important for the lives of people in your community.

What issues resonate with you? What happened in your life that inspired you to care about these issues? Do they connect with the moments you listed above?

.....
Concepts from this section adapted from the work of Marshall Ganz, Harvard University.

At the core of your personal motivation and the issues that resonate with you, are values that you share with other OFA volunteers. These values get to the heart of why you are volunteering to support OFA’s mission and policy agenda. They speak to a belief in a certain ideal for your vision of America.

From the issues you listed above, which values resonate from those issues? Which values of OFA and its agenda do you connect with? What beliefs and ideals do you have?

All of these questions should help you fill out the roots section of the tree. Your values, life experiences, choices you’ve made, issues that have impacted you, policies that have or will impact your family — they’re all a part of your roots.

When you interact with volunteers, constituents, or coalition partners, you will draw from these roots to relate to them. You’ll also use this information to form the base of your tree, or your core story from which you will learn to adapt and adjust to different audiences and issues.

Phase 3: Discovering your Base Story

A personal story, or your base story, is not a life story or history, nor is it a re-telling of all of the things that have happened to you in your lifetime. It is a focused illustration of a key moment in your life motivated you to take action for issue advocacy. You will pick one key moment out of many depending on who you are interacting with and what policy issue you are advocating for. This is why asking questions is so important.

Step 1: Challenge

Pick a key life moment or pivot point in your life that caused you to think differently about the world, brought you closer to a policy issue, was a challenge you faced, or was the motivating factor that brought you to volunteer with OFA. This should be the main event of your story from which you will build the plot and expose something about yourself to your listener.

Step 2: Choice

This moment should move you to a point in which you will make a decision on which direction you will move towards — taking action on behalf of the issue. It is often an escalation point of your main event in which you are called to make a decision, and choose a path leading in a particular direction.

Step 3: Outcome

From here, you'll round out your story with the results of that decision. Describe the outcome that emerged. This could exemplify how you ended up volunteering with OFA, or could connect back to the values or issues that resonate with your listener. Either way this element should bring the story to an inspirational close, showing that when make a decision to take action, it can make a difference.

Practice #1: Quick Write

Often the details are what make the most effective stories powerful. Before you verbalize your story, take a few minutes to write out some details about steps 1-3 above. What did it feel like, look like, or sound like? Try to describe these key points in your story in a way that helps the listener understand what it was like to be there.

STEP	PERSONAL DETAILS
Step 1:Key life moments or “challenge”	
Step 2: Decision point or “choice” stemming from the key moment	
Step 3: Results of the decision, or “outcome”	



Like a tree, your story will continue to grow as you become more rooted in organizing your community. As you talk to more of your neighbors and listen to the reasons they support the OFA policy agenda, you’ll learn how to draw upon your own experiences to adapt your story to different audiences. As you do so, your organizing relationships with fellow OFA volunteers, coalition partners, and members of your community will strengthen.

Read Cesar's personal story below. What is the challenge he is facing that relates to a problem our country is facing? What has he chosen to do in the face of these challenges? And what is the outcome of his choices?



Cesar F, Tucson, Arizona

My name is Cesar. I am a first generation American. My parents came from Mexico, a land of poverty, zero prosperity, and hardship. They came from absolutely nothing to the United States. I have seen first hand with my family in Mexico what it's like to work until your hands bleed, and still not be rewarded for your dedication. My parents at times while growing up in Mexico didn't have shoes. The reasons that people have today for coming to the United States are no different than the reasons the generations of immigrants before us and our Founding Fathers had. They came here because this beautiful land offers a chance, hope, and an opportunity called the American Dream. The United States offers people an opportunity to do big things if your willing to work hard, the U.S. rewards you like no other country in the world. My mother and father are living the American Dream and they have struggled, but not without reward. My father when he arrived in the U.S. had an elementary education, and knew zero English; he was able to overcome those challenges and be somebody. I am now a college student here in Tucson AZ, and an Organizer with Organizing for Action; I am working on Immigration Reform. I just recently got back from Washington D.C. for the Action August event, and I left with a lot of hope and a fire in my belly because there were hundreds of volunteers and organizers from all over the country fighting for people who are stuck in limbo. I fight everyday with my team for millions who are living in the shadows, and for people who are just looking for a chance. Their pain and struggle is my motivation. My message is to not lose HOPE, to stand with us, and fight along side with us; we will get there!

1:1 Meetings

When it comes to community organizing, there is no substitute for direct person-to-person interaction. Personal interaction and shared experience establish the strongest bonds, and provide the most compelling incentive for engagement. This is why one-on-ones are a bedrock OFA technique for bringing new volunteers into our chapters and teams, for developing volunteer leaders, and for maintaining relationships with active volunteers.

One-on-One Meetings (1:1s) are intentional, pre-scheduled meetings with a volunteer or a potential volunteer to discuss the organization, plan work to be done, or debrief completed actions. In OFA we talk about three types of 1:1s:

- 1** Introductory 1:1s: This is a personal meeting between a new volunteer or volunteer prospect and a volunteer leader. Often times an introductory 1:1 is a supporter's first interaction with the organization - a point of entry where they learn how what OFA's mission is and how they can contribute.
- 2** Escalation 1:1s: When a volunteer has completed the testing process for a leadership role, the organizer will hold an escalation 1:1 to confirm the volunteer to their new role. In this meeting expectations are discussed for what the new leader will need to do and how the organizer will support them to make sure the new leader is successful in the role. This conversation ends with a commitment of the newly confirmed volunteer leader to fulfill the expectations of the role.



- 3** Maintenance 1:1s: For volunteers fulfilling leadership roles in their chapters and teams, maintenance 1:1s with their OFA organizers are essential for helping them be successful in their roles and develop their skills. Maintenance 1:1 are the best way for chapter leads or neighborhood team leaders to continually work with the leads and captains they coordinate to help them reach goals and plan successful actions.

Because of the different purposes 1:1 meetings can serve, they each have different agendas. However, all 1:1s share these characteristics:

- **Face-to-Face:** 1:1s are conducted in person and in a quiet place.
- **Scheduled:** 1:1s are scheduled in advance for 30-45 minutes.
- **Purposeful:** 1:1s have an agenda and purpose. They are not about chit-chat.
- **Educational:** 1:1s are about listening. The organizer or volunteer leader should absorb where the other person is coming from and seek to understand what they are saying.
- **A Place to Share Strategy:** The organizer should clearly explain how what the volunteer is being asked to do will contribute to a larger strategy for success of the issue campaign.
- **Require Rigorous follow-up:** The onus is on the organizer to follow up afterward and help the volunteer be successful in engaging in action.
- **End with an ask and action item(s):** Organizers should go into every 1:1 meeting knowing a few actions they might want to ask the supporter to take. Then, upon learning more about the supporter's background, skills and interests, the organizer should prioritize the most appropriate ask for the situation.

One-On-One Agendas

Each type of one-on-one will have a different type of agenda. You don't need to think of these agendas as a rigid structure, but rather as a guide to lead your conversation. Remember that the primary purpose of one-on-ones is to build relationships and personalize our organization to the needs of individual volunteers. Here we'll look at sample agendas for each type of one-on-one meeting, which can be adapted according to volunteers' needs.

Introductory One-On-One Agenda

Purpose: Explain the purpose of the meeting — to get to know them, tell them about the OFA's mission and figure out together how they can be involved locally.

Connection: Ask questions about why the volunteer is interested in Organizing for Action. What issues resonate with them? Why do they care about these issues? What has been their past involvement in community organizing? What do you have in common?

Story: Share your personal story, relating to the issues or values that you share with the volunteer. Connect your story to how OFA's actions on these issues will make an impact.

Strategy: After you find shared values in your stories, explain the overall vision of OFA, and how the OFA strategy nationally and locally will help both of you achieve your shared vision together.

Ask: Make a hard ask that the volunteer get involved in a specific activity at a set date and time. A successful 1:1 meeting ends with a commitment to take action that includes a specific date, time, and goal.

Escalation One-On-One Agenda

Debrief: Review the volunteer's last activity. Ask questions in order to understand the result of the event, how the volunteer felt about the result, any challenges the volunteer faced in putting it on, and any resources the volunteer drew upon to overcome challenges.

Praise: Look back on all the actions the volunteer has taken since starting her work with OFA. Point out successes and growth over that period.

Need: Explain the team's need for a volunteer to take on the leadership role. Connect the volunteer's skills and accomplishments with the responsibilities associated with that role and with the chapter or team's needs.

Ask: Make a hard ask for the volunteer to assume that specific leadership role and carry out the responsibilities associated with it.

Agreement: Review with the new volunteer leader what your expectations of them will be, and what support they can expect to get from you as the organizer. The new leader should leave with a clear understanding of her role, and a plan for next steps in that role.

Maintenance One-On-One Agenda

Debrief: Ask for feedback about the volunteer leader’s most recent activities. Ask questions to probe whether the chapter/ team is growing and more people becoming engaged, or if progress to goals reflects just the work of a few people. Ask about specific actions the leader has coordinated.

Teach: Take time to build skills the volunteer leader needs. This can be based on challenges the volunteer has identified during debrief, further skills the organizer sees important to develop in the volunteer for her continued growth, or updates to technology or organizing techniques being introduced by OFA on a national or statewide basis.

Goals: Review the chapter/ team’s progress to goals, and set specific goals for the volunteer leader. Assess whether the team is on track to meet goals, or if other secondary goals need to be established in order to meet larger goals (e.g. in order to have more attendance at the next earned media event, make a goal to make more volunteer recruitment calls). Clarify and repeat back what support the volunteer leader needs to be successful in achieving these goals.

Following up on 1:1s

After you’ve had a 1:1 meeting, follow-up is essential to both building the relationship and ensuring action. Organizers must follow up on 1:1s to express gratitude, ensure completion of initial commitments, and deepen relationships. Follow up includes but is not limited to:

- **Expressing Gratitude:** Write thank you notes, send emails, or make follow-up thank you calls. You can also mention people you have a 1:1 with on social networks.
- **Reinforcing Commitments:** Follow up with reminders about commitments made during 1:1 and monitor progress to those goals.
- **Keep Promises:** During your one-on-one meeting, keep a list of any commitments you make to the volunteer. Make sure to fulfill these commitments in a timely manner. Relationships are built on trust, and you build trust as an organizer when you keep the commitments you make to volunteers.
- **Deepen the Relationship:** Add introductory 1:1 volunteers to your email lists and social networks. Call them periodically to check in and ask them for help in future endeavors.
- **Build a Relationship Beyond the Local Team:** When possible, follow up with non-asks. Call to give general updates about the organization and talk large-scale strategy. But also ask for updates about their personal life — their knitting club, or their child’s soccer game.

House Meetings

House meetings are gatherings of supporters in a neighborhood location. The purpose of a house meeting is to persuade, organize, motivate, and activate volunteers. House meetings are particularly effective at expanding the OFA supporter network and bringing new people to our movement, because through them hosts invite their personal social network to learn about OFA. House meetings are effective in motivating new supporters to take action and also to become grassroots donors to OFA.



House meetings are effective not only at recruiting new volunteers, but building horizontal relationships between volunteers in a chapter or team. They are an effective technique for chapters or teams that are in the first or second phase of development because it brings new people into the organization and can help transform a group of individuals into a coordinated team.

House meetings can be powerful tools, but they must be run properly in order to be successful. OFA house meetings have four main goals:

House Meeting Goals

- 1 Build neighborhood teams by bringing like-minded members of communities together to hear about OFA’s issue campaigns and strategize together
- 2 Generate enthusiasm and build relationships
- 3 Aid in the identification, testing, and development of potential volunteer leaders
- 4 Develop clear Next Steps:
 - Plan how the team will build for and execute action
 - Establish associated events needed to reach attendee goals for those days of action, identify leads

See the appendix for a guide on the process of planning, executing, and following up from your house meeting.

House meetings build community among volunteers and bring new supporters into the OFA family, so they are a great technique for building a team or chapter and motivating new volunteers to take action!

Trainings

Trainings are another key organizing technique for building capacity in our organization. Trainings can be educational about the issues or hands-on in training on new skills; the audience can be experienced leaders developing their skills or brand new volunteers getting their first taste of phone banking; the length can be all-day, several days, or just a couple hours. Trainings are essential in a grassroots-led organization because they prepare volunteers to execute well-organized actions and prepare volunteer leaders to plan, strategize, and lead those actions.

Every OFA training has four overarching goals:

- 1 Build relationships
- 2 Teach concrete skills
- 3 Earn strategic buy-in
- 4 Lead to action

By facilitating volunteer trainings with these goals, trainings become not only an opportunity to present information, but a venue to strengthen teams, develop leaders, plan strategically, and prepare volunteers to take their next steps with applying what they’ve learned.

Organizing a Training

When organizing a training for your volunteers, it’s important to strategically consider what information, skill, or planning will help grow or develop your local organization.

Let’s consider an example of a phase 2 chapter. This chapter has successfully organized an action once every two weeks and has about twelve volunteers who come to an event once a month. When an action happens, the organizer will talk to various members of the group about taking on certain roles, but none of the volunteers consider themselves to have a special expertise or confirmed role on the team. You want to use a training to prepare more of the regular volunteers to take on leadership roles. This will move your chapter towards phase 3 of development.

What does this chapter need to move from phase 2 to phase 3?

How could a training be used to accomplish these goals?

What topics would you train on for this purpose?

Who would the best trainers be for this training?

What action will come result from your training?

One way you could use training to move this chapter from phase 2 or 3 is train volunteer leadership prospects on specialized skills that would relate to their future role. For example, you could design a training that includes these modules:

- Earning Media Coverage
- Driving the Narrative
- Digital for Issue Organizing

After providing this training, your action might be a press conference where you can test a potential press lead by letting them do the pitch calls and staging of the action and a potential digital lead by asking her to take photographs and post them to social networks. A training can give the prospects the skills they need to pass tests for leadership positions.

See the appendix for a step-by-step guide on organizing a volunteer training for your chapter or team.

Grassroots Fundraising

Organizing for Action is funded by supporters who believe in our mission to support the agenda Americans voted for in the 2012 elections through grassroots advocacy on the issues. So far our average donation has been under \$60. These donors are grassroots supporters who have invested in Organizing for Action because they value the impact our organization has in their community.

Chapters and teams take on grassroots fundraising actions to encourage supporters in their own community to invest in Organizing for Action. Grassroots fundraising directly supports the organizing activity in each state, so donors see the impact of their donations in their own community. Grassroots fundraising is important because it expands the OFA donor base to people who may not give if they weren’t engaged via a personal appeal. It opens another pathway for supporters to invest in Organizing for Action in addition to volunteering their time, and gives local community ownership over organizing. Finally, the investment of local donors demonstrates popular support and illustrates the grassroots nature of our movement.

Who Are Our Grassroots Donors

Many of the principles that you’ve already learned about organizing apply to grassroots fundraising as well. Most important among these is that building relationships is critical when asking people to invest in our organization. Like conversations that end in a volunteer ask, conversations that lead to a donation ask should engage the supporter’s values and illustrate how OFA’s strategy will successfully advocate for policy initiatives the supporter cares about.

Nearly everyone that you can approach about volunteering you can also approach about making a grassroots donation. In fact, some people who you know do not have time to volunteer may be open to making a donation as their pathway to supporting OFA’s organizing. When grassroots fundraising for your chapter or team, first take some time to consider whom you can ask to donate. This will help you build your personal invitation list for fundraising events or phone calls. Before you start making asks, consider what the supporter cares about and what OFA is doing to address issues that matter to them.

BUILDING RELATIONSHIPS

NAME	PHONE NUMBER	PERSONALIZED MESSAGE ABOUT OFA	SUGGESTED DONATION AMOUNT
Aunt Betty	922-8076	Benefited from Obamacare eliminating lifetime caps on payments. Wants to see Obamacare enrollment succeed so more people like her have access to health insurance. OFA is helping spread the word about the positive effects of Obamacare and letting people know how they can enroll.	\$50
Pastor Bill	451-4461	Cares about gun violence prevention and concerned about recent incidents of kids taking guns to school in our community. OFA advocates for common sense background checks to prevent this.	\$100
Mom	378-4257	Deeply concerned about climate change and frustrated that Congress won't do anything about it. OFA is calling out climate denier and insisting they be accountable for their position to their constituents.	\$25

Making Effective Grassroots Fundraising Asks

The most effective grassroots fundraising asks are very similar to the conversation you have during a volunteer recruitment phone call or an introductory one-on-one. Below are the steps to having an effective grassroots fundraising conversation.

- 1** Ask questions about what the donor cares about. It's important to listen to what the donor cares about and understand their values relating to our policy agenda; to do this you must engage the donor with questions.
- 2** Share your personal story. Relate to the donor's concerns by illustrating your real-life connection to that problem. Explain the work that OFA is doing and how it can help solve this problem, with the donor's support.
- 3** Give concrete accomplishments. Illustrate how OFA's issue advocacy strategy has been successful and explain how donor funds are used to advance that strategy locally.
- 4** Share what we do together. Put the donor's contribution into perspective by sharing the goal for your fundraiser or the fundraising cycle. While \$25 may not seem like much, let the donor know that in concert with other grassroots donors this money will help fund important OFA initiatives.
- 5** Join our team. When you make your fundraising ask, explain to the donor that this is an investment in OFA's mission and strategy. Ask for a specific amount that you think the donor can afford. If this amount doesn't work for the donor, just ask them what they could afford. Any donation indicates an investment the supporter is making in OFA's work on the local level.

After a fundraising conversation, it's important that you follow-up with the grassroots donor. All they can do on the phone is pledge to contribute, so make sure they know how to make their donation. Then keep them informed about what your chapter is doing so they know that their investment in OFA is producing results!

Organizing Grassroots Fundraising Events

There are a number of ways to grassroots fundraise, including phone calls to potential donors, receptions, house meetings, or other events. In the appendix you'll find more resources about planning a grassroots fundraising event. The important thing is to make your fundraiser match your community. If you live in a community that is passionate about barbeque, maybe a cook-off will be a perfect fundraising event. Get together with your volunteers and plan grassroots fundraisers that will engage supporters in your community and allow them to learn about and support OFA's organizing.

Metrics Driven

At OFA we talk about our organizing as being “people-centered and metrics-driven.” We’ve already discussed how important relationship building is to organizing. Equally important, however, is keeping track of all the types of contacts we’re making in our community, actions we’re taking on our issues, and volunteers we’re preparing to take leadership. Keeping track of data in our volunteer database allows us to keep track of what we’ve accomplished over time, follow up on work, keep track of our relationships, and build our organization in a data-driven, strategic way.

The bulk of OFA data is tracked in SmartVAN, which is our supporter database. Through SmartVAN, we track the attendees to our events, the types of events we’re planning, information we learn about new volunteers during one-on-one meetings, where volunteers are in the testing process, the roles volunteer leaders are playing within their chapters and teams, and volunteer prospects who can be called and asked to take action. Tracking this information in SmartVAN allows us to assess our organizational strength and potential in each area of the country, and strategize about how we can grow and develop. Data also records the interactions we’ve had with supporters so future volunteers will have a history to reference when they follow-up with those supporters in the future. Well-maintained data is a legacy that chapters and teams are passing down to the OFA organizers who will come after them because it maintains the history of their organizing work and allows future volunteers to build upon that work.

Each team and chapter should determine the best strategy to make sure that their work is accounted for in this volunteer database. Most chapters test and confirm a data lead who pursues in-depth training on SmartVAN and can then coordinate additional chapter and team volunteers in making sure data is entered back into SmartVAN and pertinent data for actions can be accessed from the database.

Keeping accurate data allows us to evaluate ourselves to ensure we spend our resources in the best way possible. We have different reports, each one summarizing and displaying specific data from SmartVAN, which we use to hold ourselves accountable on a day-to-day basis. Those reports also help us determine our strengths and weaknesses as a program. If we are not doing well, we strategize how to do better. This is how we are able to implement winning strategies to advocate for our issues, and ensures that our organization is working in the most strategic and effective way.

Let’s consider how this cycle of people-centered, metrics-driven organizing would work on a particular event. Let’s say your chapter is trying to persuade a member of your state legislature to support marriage equality in an upcoming vote.

You [strategize](#) that the best way to use your resources is to make sure the Representative knows you're getting the word out in the community and that he has a lot of constituents who support the measure. So you decide to go to his neighborhood to collect petition signatures of his constituents who support marriage equality. Next, you [organize](#). You know you can't make a very big impact by yourself, so you use SmartVAN to pull a list of volunteer prospects in your neighborhood. After you call them, you mark the result and use the My Campaign calendar to schedule the people who've agreed to come to your action. Now the time has come to actually [collect](#) your petition signatures. The volunteers you contacted join you, and you start approaching people to sign. After the event it's time to [report](#). Immediately you want to provide a soft report, so that your organizer knows how the event went in terms of petitions signatures collected and how volunteers engaged with the event. After your soft report, you'll enter data into SmartVAN so that we know who our petition signers are and we know what volunteers showed up today for our action. After all the data is entered, we begin to [analyze](#) it. The point of collecting data is to be able to use it to inform our decisions. During the analysis stage, you should look at the data to see if there are patterns that impact your strategy. Finally, we come back to [strategizing](#) — making a plan for the next action that is based on an understanding of what happened during the first action. In our petition collection example, if 80% of the volunteers who said they'd come to your action didn't show, you might change the way that you're making the volunteer ask or look at what kind of reminders people might need.

For every action we take as an organization, it's important to report data so that it can be analyzed and our strategy adjusted to be even more efficient and impactful. This is how as an organization we're able to use data to become increasingly better organizers.





Appendix: Step-by-Step Guides

Event Organizing 101

Organizing a Press Conference

Organizing a MOC Office Visit

Blizzarding

Getting Sign-On: Petition and Pledge Card Drives

Writing Letters to the Editor

Pledge-to-Call Drives

Taking Strong Photos

Organizing a Grassroots Fundraiser

How to Organize a House Meeting

How to Organize a Training

Event Organizing 101

No matter what kind of organizing event you're planning, some basic best practices for planning and execution apply. Use this guide as a checklist to think through the steps of your issue advocacy action. Then check out other organizing guides to walk through specialized steps that apply to the specific action you're planning, such as a press conference or blizzarding.

Before the event

- Choose a date, time, and location for your event, and a rough idea of how many people you would like to have attend.
- Create an online listing for your event at my.barackobama.com/page/event/create (see event posting instructions below)
 - 1** Enter the ZIP code of the location where your event will take place.
 - 2** Choose the appropriate event type from the drop-down menu and continue to the next step.
 - 3** Enter your email and choose a password to create a barackobama.com account (or sign in if you already have an account).
 - 4** Enter your event details — be sure to add all the relevant information, including a description that lets attendees know what to expect at the event.
 - 5** When you're done entering the event information, click “Create Event” to move on to the next page — after your event listing is created, you can begin inviting people!

- Start recruiting for your event, keeping in mind that you should get commitments from about twice as many people as you'd like to attend (for example, if your attendance goal is 15 attendees, you should strive to get RSVPs from 30 people). This is based on typical show-up rates for events.
- Plan out the agenda for your event, and how long each part of the agenda will take.
- Do some basic research on where your member of Congress stands on the issue, including their past statements and votes. You can find fact sheets on a number of issues at barackobama.com to share with your guests.
- One rule of organizing is that every event you hold should lead to future action. Think about what action you want your event attendees to take after this event, and be ready to share the details with them at your event.
- Make a confirmation call to everyone who RSVPs and send them a reminder email.
- Day of event: Make sure you arrive early to your event location to get sign-in ready and prepare the space.

During the event

- Ask every attendee to sign in using a sign-in form, and thank them for coming
- Follow the agenda you created
- Share the goals of the event with all attendees, and at the end of the event, report back on how the group did on achieving these goals.
- Take pictures, tweet and update Facebook with stories, quotes, and fun anecdotes. We want everyone to know that folks across the country are getting involved in our issue campaigns.
- As your event draws to a close, sign all attendees up for the next action.

After the event

- Thank your guests for participating and confirm them for your next action (tip: use both a phone call and an email).
- Share your success! Report back to your organizer how the event went.
- Make sure the data from your event is entered into SmartVAN and all the attendees for the event have been marked recorded in the My Campaign calendar.
- Post photos, anecdotes and stories on social networks, so that you can share the link later with attendees, as well as those who didn't show.
- Call through those who didn't show and invite them to your next action.



Appendix: Step-by-Step Guides

Organizing a Press Conference

Organizing a Press Conference

FIRST: Confirm with your state coordinator/lead that your event should be an earned media event.



A huge component of issue organizing is being able to persuade our Members of Congress to enact the change we want. Members of Congress are often most persuaded by what messages they are getting from their constituents — because they want to get re-elected. However, not every constituent has the time to contact their Member of Congress on every issue up for debate. So our job is to make sure we can amplify their voices to our elected officials. The best way to do that is to host an event that the media will cover, ensuring that our message gets out far and wide.

There are four main elements that every event needs in order to be the most attractive for media outlets and the most impactful. You need: 1) a clear message, 2) effective speakers, 3) a good location, and 4) provide a local perspective on a national issue. For more details on each of these elements, please revisit pages 28–37 of this manual.

Timeline

3 Weeks Prior to Event:

- Identify the message/purpose of event
- Identify speakers who could speak at event
- Research locations for event
- Plan phone banks to recruit for event

2 Weeks Prior to Event:

- Lock in location
- Start locking in speakers
- Post event on Barackobama.com when location is locked
- Conduct Phone Banks to recruit for event

1 Week Prior to Event:

- Confirm speakers for event
- Confirm attendees for event
- 4 days prior to event, you will receive press advisories and sample remarks for talkers

Best Practices

Message: You need to have a clear understanding of what the message is you want conveyed at the event.

- This message should be weaved in the signage, the talking points of each talker and reflected in your location.
- The message must include which Member of Congress you are focusing on for the event (either positively or negatively)
- The message must include organizations represented at the event
- Keep in mind the importance of signage, and judge the strength of your signage by asking yourself: If I were watching the news while doing the dishes in my home, and the TV were muted, would I understand the purpose of this event?

Talkers: The people who are going to help spread the message of the event.

- **Surrogates:** People who attract media attention — elected official, celebrity
- **Validators:** Someone who is seen as an expert on the issue. They validate the issue to the local community — local elected official, community leader, and grass-tops.
- **Constituent supporter:** Someone who is an everyday person who can speak personally on the issue. They bring the human element to the story.

Location:

- Where and when possible, your location should reflect the message of the event.
- Make sure you have a location that you can control.
- Keep locations close to news stations (the less they have to travel, the more likely they are to show up).
- Think about the background image. Does it reinforce your message?

Connecting local issues with national issues:

- Earned media events are more appealing to news outlets when they are able to cover a national story and give it local flavor.

Pitching the Press

A pitch call is an opportunity to talk directly to a news outlet to tell them about your event, why they should cover it, and get a concrete commitment from them to cover the event. It is important to note that television stations have morning meetings, around 9am local time, to determine which stories they will cover for that day. As you continue to call these TV outlets you will learn their meeting schedule. In the days leading up to your event, calling and emailing press advisories to news outlets is the best way to put your event on the radar of news outlets. Some local TV stations and newspapers will have an event calendar where they will let the public add their events so other visitors to their websites can see the upcoming events. This is a good way to get additional attention for your event.

Timeline

4 Days Prior to Event:

- Receive Press Advisories from State Coordinator/Lead
- Receive specific message guidance on the Day of Action event
- Confirm speakers for event (speakers should be locked as early as possible)
- Send message guidance and sample remarks to speakers
- Recruit volunteer(s) who can take pictures and/or video and post to social networks and submit to TV stations and newspapers (for those websites that allow)

72 hours Prior to Event:

- Press Advisories emailed to press outlets in AM
- Host a prep call or meet with your speakers to ensure they are clear on the message for the event

48 hours Prior to Event:

- Press Advisories emailed to press outlets in AM
- Follow up via phone to ensure outlets received these advisories (most outlets will not make a commitment to attend your event at this point)
- Prepare signs for your event that fit with the message frame

24 hours Prior to Event:

- Press Advisories emailed to press outlets in AM
- Follow up via phone with a pitch call to the press outlets (now you should make the ask to attend your event)
- Confirm any last minute details with speakers
- Confirm volunteer(s) who will take pictures and/or video of the event

Day of the Event:

- Pitch calls and/or confirmation calls to the press in AM
- Greet reporters who attend the event and get their contact information (either ask them to sign in on a Press sign-in sheet, or collect their business card)
- Report out to State Coordinators/Leads any press that showed to your event ASAP
- Have a volunteer designated just to take photos and/or video of the event
- Post pictures and status to Facebook and Twitter during your event

- Upload photo/video to news outlet’s websites who did not attend your event
- Email pictures during your event to your state coordinator/lead
- Look for and send up any press clips from your event
- Report out to State Coordinators/Leads event details including total attendees

Day after the Event:

- Continue looking for any press clips from your event and send up
- Send any additional pictures and/or video to your State Coordinator/Lead
- Post wrap up of event to your Facebook and Twitter accounts

Best Practices for Pitching to Press

- Begin generating interest in your event by emailing press advisories to news outlets 72 to 48 hours in advance of your event
- After emailing the initial advisory, follow up with a call to ensure they received the information and do not have any questions.
- Mornings are the best time to call a newsroom. By afternoon most reporters are under a hard deadline and will be less willing to be on the phone for very long.
- Be prepared for a brush-off! Unless your event is the same day you are calling/emailing the newsroom, they will most likely not commit to attending your event, but make sure to ask when they will make the decision so you can follow up.
- Think of your press pitch call as a volunteer call — you always have an “ask” to make, but you also need to give the reporter a reason to say yes. Make the story appealing to them.
- Wear your passion on your sleeve! Your excitement will make reporters excited to attend.
- Make your call personal — local reporters want to cover issues that affect their communities specifically. Why is your Congressman’s office important? Why is this issue so important to your community?
- Have strong follow up! Even if you’ve already spoken to a reporter and gotten a commitment to attend, follow up the morning of your event with another call to confirm their attendance.



Appendix: Step-by-Step Guides

Organizing a MOC Office Visit

Organizing a Member of Congress Office Visit

The ultimate goal of our issue organizing is to persuade our Members of Congress to support our position on legislation — so at times it can be particularly effective to talk directly to the lawmaker or his staff. Member of Congress office visits create an opportunity to tell our supporters' story directly to the lawmaker's office. These visits can also be compelling earned media opportunities and provide an opportunity to generate interesting content for digital amplification.



Before your Visit:

- **Determine if this event is press worthy.** Talk with your state coordinator or OFA point of contact to discuss your plan for your Member of Congress visit and whether it would be a good opportunity to earn media coverage. If yes, determine a member of your chapter to reach out to the press following the guidance for organizing a press conference.
- **Schedule volunteers to attend the office visit.** Set a goal for how many volunteers you'd like to have join you on your office visit. Congressional district offices are often small places, so you don't necessarily need a large group to fill the space. Work with your chapter and neighborhood teams to make calls and send out invites for people to join the office visit.
- **Write out what matters to you.** It can be very effective to leave the Congressional staff with information on the people who attended the office visit. Having each of the volunteers write out their personal story that relates why the issues matters in their lives can leave a big impact. Make sure to have volunteers include their address so that the lawmaker can see that they are his constituents.

During Your Visit

- **Introduce yourself.** When you enter the office let the staff know that your group is from Organizing for Action and would like to sit down with the Member of Congress to share your perspective on the policy issue. If the Member is not there, ask for a short meeting with one of the staff.
- **Share personal stories.** Have constituents in the room share why they are passionate about the policy issue and how it impacts their personal lives and the life of the community. Speak from the heart; you don't need to be an expert, just someone who knows firsthand how important this legislation is.
- **Ask for their support.** Before you leave, ask if your member of Congress will commit to supporting the legislation on this policy issue.
- Stay calm and positive. Our goal is to engage in a meaningful, respectful discussion. Remaining calm, positive, and polite while speaking to any staff member is the best way to be heard.
- **Take photos and post them to Facebook and Twitter.** Tell the story of your office visit as it is happening in real time.



After Your Visit

- **Plan next steps with your attendees.** After your visit take some time to debrief with your volunteers before they go home. Make clear what your next action on this issue will be and schedule them to join.
- **Report back about the result of your event.** Let your OFA point of contact know what happened, and make sure attendees are entered into VAN.
- **Look for press clips.** If press attended your event, monitor that news outlet to see if a story about your office visit is broadcasted. If so, make sure to share the clip with your chapter lead or the state coordinator.



Appendix: Step-by-Step Guides

Blizzarding

Blizzarding

What is “Blizzarding?”

“Blizzarding” means flyering or delivering postcards to help bring an important issue to the attention of more people and lawmakers in your community.



Why Blizzard?

There are two key goals to blizzarding:

- **Spreading the word:** Blizzarding can help raise the profile of an issue, provide community members with important information, and inform them where their lawmakers stand on the issue. In many cases, constituents who strongly support an issue don’t know that their elected representatives may be planning to vote against their wishes.
- **Applying pressure to lawmakers:** In addition to letting people know where their lawmakers stand on an issue, blizzarding is a way to make those lawmakers aware that this is an issue that their constituents care about and are engaged with. An important part of this action is making sure that lawmakers know about it — by posting on social media, and encouraging local media to cover your work.

Planning Your Blizzarding Event

You can blizzard by yourself, or with a group of friends or local supporters that you help recruit.

- **Find a neighborhood:** Identify the best neighborhoods for flyering or postcard delivery. Think about which communities are most likely to be impacted by the issue, where the issue has the most support, and which areas you have existing relationships and familiarity with.
- **Print your flyers/ postcards:** You'll be responsible for printing up copies yourself. You can find fliers for a number of issues at barackobama.com.
- **Recruiting volunteers:** Even a small group can be successful using this action, but it's important that you document and amplify your efforts effectively. Here are a few volunteers roles you should consider having:
 - **Photo/ digital captain:** Someone to take excellent photos during your event and post to Facebook and Twitter afterward (be sure to mention the issue and the lawmaker you're trying to influence).
 - **Logistics captain:** Someone whose primary responsibility is making sure everyone knows where they're going, that they have the materials they need, and that communication is clear while volunteers are out flyering.

Making an Impact

- **Be aware of the visual:** A flyering event with just a handful of people can have an enormous impact informing communities, applying pressure to lawmakers and creating great social media content. Even just a few good photos can tell the story of your event, but be aware of the visual — make sure your message is clear but respectful, and that you're focusing on your interaction with the community.
- **Reach out to local radio, blogs, and TV media outlets:** Reach out well in advance, the day before, and as a follow-up the day of your event to pitch your flyering event to press. In some communities, local radio stations, local blogs, and TV shows carry a lot of weight.
- **Consider your messenger:** If your team is pitching your event to a publication widely read by a specific community, the volunteers doing interviews should ideally be someone who identifies with that community. For example, a Spanish-speaker may be the best messenger for a Spanish language newspaper serving the Latino community.
- **Tell your lawmaker about it:** A great way to reach lawmakers is through social media. For example, tweet a photo and description of your event using your lawmakers Twitter handle.



Appendix: Step-by-Step Guides

Getting sign-on: Petition and Pledge Card Drives

Petition Drive

Gathering Petition Signatures

Petitions are one of the best and easiest ways to raise awareness and build support for an issue in your community. Below are a few tips and tricks for successful petition signature gathering:

Find the Right Petition

- You can download petitions for a number of issues at barackobama.com
- Make sure to print out copies that are easy to read — even from a distance — and clearly communicate the issue.

Make the Ask the Right Way

- **Be approachable, but don't wait to be approached.** Having a friendly demeanor goes a long way when it comes to gathering signatures. Even if it doesn't come naturally to you, smile and speak with confidence — it will make the difference between a successful outing and a disappointing one.
- **Make a clear ask.** Research shows that people are more likely to respond when you phrase the question as “Have you signed the petition in support of _____” rather than open-ended questions like “Do you support _____?”
- **Be sure to smile and make eye contact** (don't wear sunglasses if you can avoid it), and be as engaging and friendly as you can.

Be Strategic About When and Where You Go

- **Look for spots with lots of foot traffic.** You can maximize your efforts by talking to the more people in the time you have to gather signatures.
- **Choose a time of the day when more people are outside.** Mornings, lunch hour, and early evenings are often the best time during the weekday.
- **Catch people in line or as they exit.** DMVs, shopping centers, theatres, and bus stops can be a great place to talk to people as they wait.
- **Make signature swings.** Hit everyone in one location and then move on to the next. When foot traffic dies off, move on to a new spot.
- **Make multiple events each day.** Even just a few signatures here and there add up over the course of the day.
- **Ask for advice.** Your friends, co-workers, neighbors and fellow volunteers know their neighborhoods best and may have good advice on where to look for signatures.



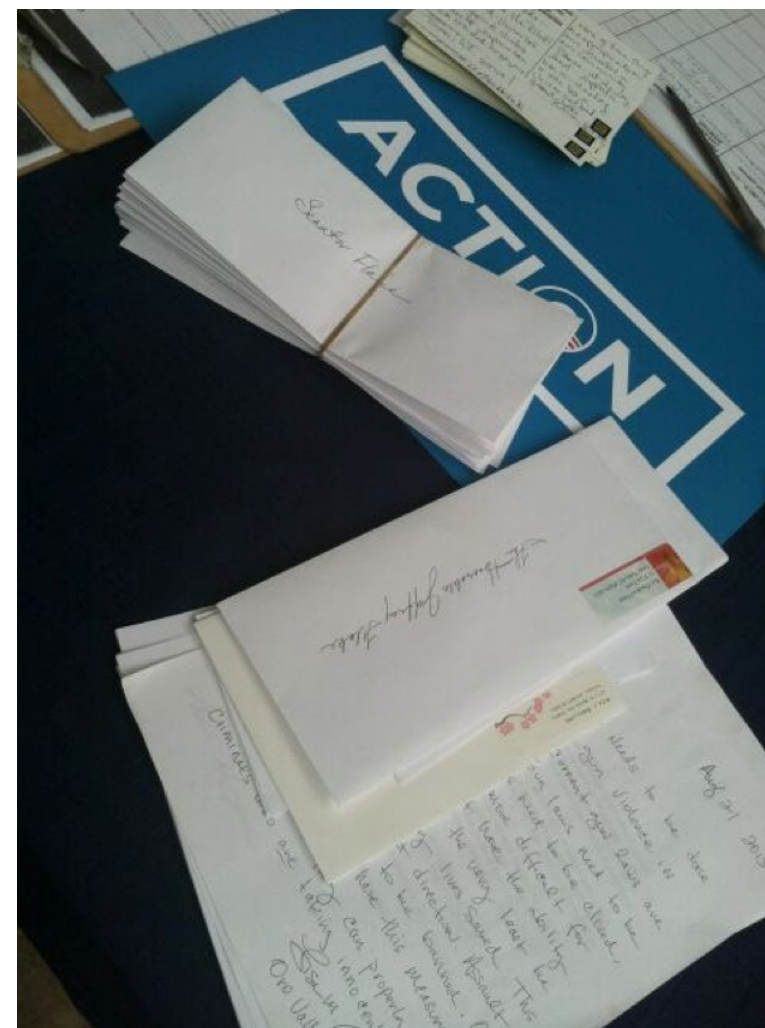
Appendix: Step-by-Step Guides

Writing Letters to the Editor

Writing Letters to the Editor

What is a “Letter to the Editor” (LTE)?

A letter to the editor is a short letter to a local newspaper or publication that gives your opinion on an issue and calls on your lawmakers or fellow community members to take action.



Why Write an LTE?

The letter to the editor section is one of the most widely read parts of most newspapers. These letters can help win issue campaigns by:

- Raising awareness. An LTE is a great way to raise the profile of an issue in your local community.
- Responding rapidly to new developments. Many publications print LTEs within a day or two of receiving them, making them one of the most effective actions when trying to respond quickly to new developments or announcements.
- Energizing our supporters and thanking supportive members of Congress. Published letters fire up local supporters and show lawmakers that their constituents have their back when they lead on important issues.
- Sending a message to the opposition. LTEs can show unsupportive lawmakers that their constituents care passionately about an issue and will hold them accountable if they fail to represent them.
- Persuading those who are on the fence. LTEs can show how an issue affects local people in a way that those on the fence, including lawmakers, may sympathize with.

People Read LTEs to Find Out:

- How local people think or feel about an issue.
- How an issue is affecting the local community.
- What are the major impacts of a potential piece of legislation or action.

However, people do not read LTEs for:

- In-depth policy descriptions. LTEs should be short and demonstrate the local and personal connection to an issue and the views of local community members. You don't have to be an expert on an issue to share your personal story. Most papers will not print select letters that are too long or try to outline an entire policy issue.
- National political debates about an issue. People turn to TV and large publications to learn about the national debate on the issues. LTEs that speak in general terms about how an issue affects the entire country or region will likely not be selected for publication in a local paper.

Planning Your LTE Campaign

- **Research publication type.** Which publications are commonly read in your community? Most local newspapers have well-read letters to the editor sections, but they can be found in unlikely places. Don't forget online spaces like Patch.com, alternative papers or lifestyle magazines that younger people may read, and community specific media, including media in languages other than English. Don't discount a publication just because you don't often read it — it may be very popular with other parts of your community. Investigate what's out there by asking friends what they read and listen to. Make a list of the publications to target with your campaign.
- **Consider radio and TV media outlets.** In some communities, local radio stations and public-access TV shows carry a lot of weight. Look into submitting LTEs to such programs if they have a segment where letters are read aloud on air.
- **Know the rules for LTE submission.** Publications usually have tight rules for publishing, including length of the LTE and listing your own contact information in a very specific manner, and they will reject letters if they break the rules. Know the rules for submission and make sure your letters conform to them. Know the publication's schedule and submission deadlines.
- **Consider your messenger.** If you are working with a group of volunteers on an LTE to a publication widely read by a specific community, it's usually ideal to make sure the name attached to that LTE is that of someone who identifies within that community.

Write Your LTE

- **Keep it short.** Stay within the publication's rules — likely no longer than 250 or 300 words. This may seem very short, but shorter letters are the most effective. Get to the point.
- **Tell your story.** Begin the letter with a brief story about you or someone you know. People can argue with your positions, but they can't argue with your experience. Describe how this issue has affected you, your family, a coworker or a friend. Make it personal. Even another local OFA volunteer, someone you met on a long plane or bus ride, or in line at the grocery store can be a great subject for an anecdote (especially if this person is from the local area). Make the issue human.
- **Know your audience.** What type of publication are you writing for, and who is reading it? Retired people, young professionals, and immigrant families may find different types of personal stories compelling. Use a story the audience will connect with. Ideally, have your letter writer be of the same group or background as the primary readership of the publication.
- **Don't delve into policy.** There is not enough room in 300 words to make a nuanced policy argument. When using facts and numbers, use only one or two, and choose the most powerful. A long string of facts and information is not an argument.
- **Use powerful language.** Let your feelings show! Use powerful verbs and descriptive nouns. Write short, punchy sentences. Vary sentence length. This will help your letter stand out and make it more likely to be published.
- **Make a call to action.** End your letter with a specific call to action to your local lawmakers or community members. Your LTE will only be effective if it gets others to take action!
- **Check for proper grammar and spelling.** If you're working with a group, trade letters with each other and edit them carefully. If you're writing a letter by yourself, ask a friend to take a look at it before you submit it. Don't submit LTEs with errors — they will likely not be published, and even worse, they may be published with the original errors.

Getting Published

- Monitor the publication. After you send your LTE, keep an eye out! Many publications, especially small ones, may not tell you if you will be published because you have already given your permission to publish the letter by sending it.
- If you are published: Success! Congratulations! Your message is being heard.

Make sure to:

- 1** Reshare the printed LTE on Facebook, Twitter, and other social media outlets. Link to the page where it is published online. E-mail it yourself from the site if possible.
- 2** If the publication has an “e-mail” or “share” feature, ask local supporters to use the web site itself to send the piece to family and friends. This will make it rise on the “most e-mailed” or “most shared” list on the site if it has one.
- 3** If your letter is printed in the actual paper, clip the letter and make a scan of it. If it’s broadcast on TV or radio, record it.

Sample Template

Below is a sample template to help you structure your letter.

Dear Editor:

[If you are responding to or referencing another article, you should reference it by writing the first sentence, then the title of the article, the name of the publication & finally the date it was published. If not, you can start here with the reason why you’re writing, but it’s not always necessary. Sometimes it’s best to include some kind of interesting hook here that also explains why you’re writing without saying “I’m writing because...”]

[Tell your personal story in this second section. How has the issue impacted you, your family, or someone you know? Or why is this issue important to you? What are the impacts of the issue on people in your community? Remember to be concise, draw a local connection, and relate to the community you know best by touching on the values you share with them. If you include contrast — what the opponents think — be respectful.]

[So now what? Are you encouraging readers to contact their legislator? Are you asking them to take some other action? Don’t be afraid to make a specific ask of the people reading your letter.]

[End on a positive note. You have gone to all this trouble to entice your readers, you don’t want to turn them off to your opinions before you’ve sealed the deal.]

Sincerely,
[YOUR NAME]
[YOUR CITY, ST, Month DD, YYYY]



Appendix: Step-by-Step Guides

Pledge-to-Call Drives

Pledge-to-Call Drives

Overview

Any lawmaker will tell you that the biggest factor in the decisions they make is what their constituents care about and are requesting of them. Congressional representatives and Senators receive dozens and sometimes hundreds of calls and letters to their offices daily, urging them to support or oppose issues being debated in Congress. Use this guide to organize local supporters to contact their lawmakers on the issues you care most about.



STEP 1: CALLING YOUR REPRESENTATIVE OR SENATOR

Before you ask others to call, be sure to do it yourself. Your voice is just as important, and having already completed the process will make it easier to explain it to others. You may find it helpful to do a quick internet search for any comments your members of Congress (remember, you have two senators and one representative) have made on the issue you are calling about, but it's not necessary — you can simply urge their support for an issue, give them your information and be done with the call in less than a minute. The easiest way to get in touch with your member's office is through the Congressional Switchboard. Dial: (202) 224-3121 and ask to be put in touch with your representatives.

SAMPLE SCRIPT

Hi, my name is [NAME] and I live at [say ADDRESS slowly — often they will record it so they can send you a response]. I'm a constituent, and I'm calling to encourage [REPRESENTATIVE/SENATOR NAME] to support [ISSUE].

[Explain why this issue is important to you personally].

Can I count on [HIS/HER] vote in support of this important issue?

[WAIT FOR RESPONSE]

[IF YES:] Great! Thank you so much for your support!

[IF NO:] I'm sorry to hear that. Again, I'd like to strongly urge [REPRESENTATIVE/SENATOR] to reconsider, because [HIS/HER] constituents strongly support action on this issue.

Please stay in touch with me about [HIS/HER] position on this issue.

STEP 2: FIND 5 FRIENDS & FAMILY TO CALL

Remember that for every call you place in support of a bill, there are also groups mobilizing to generate calls and letters in opposition. In order to ensure the voices of your community are heard loud and clear, the next and most important step is to find at least five friends or family members to call with the same message that you called about.

- **Make it easy for them.** You should provide them with the name of their members and the direct line to their office, which you can get from the Congressional Switchboard in Step 1.
- **Give clear instructions.** You might want to print up a sample script for them follow. If not, be sure to give them clear direction on what to say.
- **Make it personal.** Explain why this issue is so important to you, and encourage them to talk about why they care as well. It will be easier for them to get their point across over the phone if they've already discussed it in person with you.



Appendix: Step-by-Step Guides

Taking Strong Photos

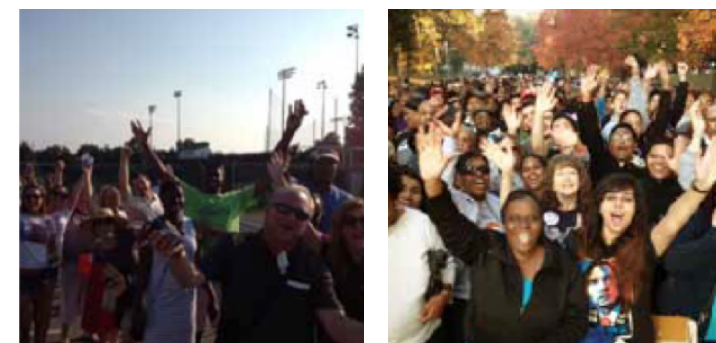
Taking Strong Photos

You might not be a professional photographer, but you can be a good photographer — and you don't need a fancy camera. Combined with free apps, today's camera phones are convenient enough and perform well enough to capture excellent photos. Here are some tips for making sure your photos of an event effectively tell the story of our organizing.

- 1 Get the posed photos out of the way first, allowing everyone to relax and you to get candid.



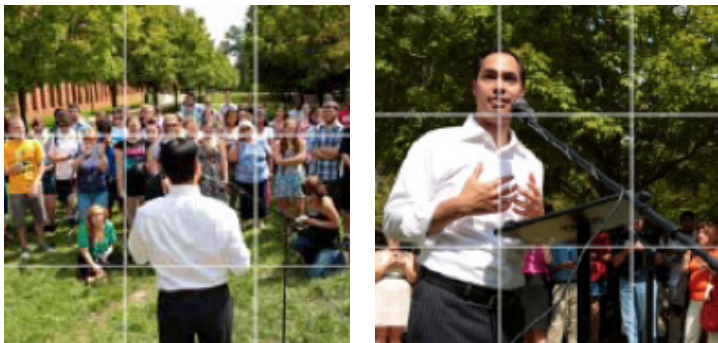
- 2 Watch the light behind your subject. If they're in front of a window or lamp they'll come out dark. Move to the side to another angle where they will be better lit.



3 Get closer. If your photos aren't good enough, you're not close enough.



4 Move your subject from the middle — the rule of thirds.



Creating a Shot List

One way to make sure that you capture the photos that will tell the story of your event is to plan a shot list beforehand. This will give you a chance to consider before the action happens what images will help tell the story of the event. When creating your shot list, also consider what will capture the attention of the main audience for your photos: potential supporters in your community, the local media, and key decision makers we're trying to impact.

Here is an example shot-list for an event when volunteers delivered Climate Denier Awards to Members of Congress who deny the science on climate change:

- Close up of Climate Denier Award
- One portrait of each volunteer holding the award
- Exterior of Member of Congress's office
- Close up of a volunteer carrying the award in the parking lot
- Head-on shot of volunteers approaching the office with the award, taken from the entrance
- Volunteers talking to staff
- Volunteers talking to Member of Congress
- Member of Congress with the award



Appendix: Step-by-Step Guides

Organizing a Grassroots Fundraiser

Organizing a Grassroots Fundraiser

FIRST: Confirm with your state coordinator/lead that you are cleared to run a fundraising event.

A fundraising event is an opportunity to gather supporters together in supporting OFA and issue organizing in a new, fresh context. Grassroots fundraising events, while still organized and operated by volunteers, require materials and preparations that can differ from ordinary field events. In this regard, use this guide as you navigate the process to make your grassroots fundraising event run smoothly and successfully.

Before the Event

Set a Location and Date

Remember a good rule of thumb is to set your date 10–14 days ahead of time, and that the event does not need to be at your home.

Set Goals

- **Main Goal:** How much will you raise? Set the dollar amount.
- **Secondary Goal:** How much will you ask attendees to donate? This is the average donation per person.
- **Secondary Goal:** How many attendees do you want to show up? You will need to invite enough attendees to hit your goal. A good way to figure this out is to take the Goal Raise for your event and divide it by your average donation (the amount you're going to ask people to donate). For example if your goal is to raise \$500 and you're asking everyone to donate \$20, then you will need 25 attendees at your event. In order to get 25 attendees at your event, you should invite at least 50.

Grassroots Event Link

You will need to ask your State Coordinator or person you directly work with/report to for OFA in your chapter or team to help get you a donation link specific to your event. By doing this, you can have folks directly donate to your event's link and track how much you are raising towards your goal.

Action Theme

Your event should have an action component to it that helps advance at least one or more of the issue campaigns we're working on. Decide what activity your event will do, such as writing letters to the editor or calling members of congress around an issue, and include it as a part of your ask to attendees for your event.

List your Event on BarackObama.com

Register your event on BarackObama.com so you can amplify your event online and use the link to invite event attendees.

Create Attendee List

Remember, you should reach out to your personal network and ask for a list of supporters in your area from OFA if you need/want to invite more people.

Invite Attendees

A good rule of thumb is to invite twice the attendees that you need to ensure you reach your goal. For example, if you need 25 people from the previous example, then you should invite 50. And remember, a personal ask is best. You should use all methods to invite attendees through social media and email but a personal ask face to face or over the phone from the host is the most effective.

Confirm Attendance

Make sure to remind people about your event with both a phone call and e-mail 48 and 24 hours in advance.

During Your Fundraiser

See below for a sample agenda and details for your event!

Sign in

Ensure you have assigned a fellow volunteer to handle the sign-in process. A best practice is to have a computer available with your event's fundraising link up to accept donations directly.

Introductions & Welcome

The host should share their story and invite a few other attendees to share theirs. The intro should be no longer than 10 minutes to ensure you keep up excitement in the room. The host should also announce the goal for funds raised for the event.

OFA Update

The host or another Volunteer should give an update to the crowd to review what action has been taken around issue campaigns in the community and upcoming events where attendees can take action. This is an opportunity to inform guests of how their donations will be put to good use.

Celebrating our Goal

The host will announce the money that has been raised so far. They will have a volunteer who has been keeping track of donations during the sign in process. A good best practice is to use a makeshift thermometer to show where the goal for the event is and where you stand. If you have already hit the goal, ask everyone to pitch in 1 more dollar to reach another benchmark. If you haven't hit your benchmark, show what you have left to raise and ask everyone at the event to help you reach your goal. Tally any remaining pledges and celebrate hitting your goal.

Action

Including an activity around at least one issue campaign will not only help advance the issue on the ground but will also help to bring more attendees into the organization through volunteering. It's the perfect example of killing 2 birds with one stone. The activity should be timed to the rest of the event and should be no longer than 1 hour. Good examples are letters to the editor, call congress, or a mini-training.

Next Steps

After folks have finished the action event at your house party, you will want to give them an opportunity to hear how to get involved with more detail. The announcement of next steps can come from the host or another volunteer and should be planned ahead of time for what you want attendees to take action on after the event. It is also important to ask folks to make a public commitment to take action after the house party and ensure you have someone focused on signing people up directly for the next event. A good next steps best practice is having the future action events on a large piece of paper and directing folks to sign up after it is announced.

Closing

This is an important component of the event. In five minutes, the host should bring everything to a close, thank attendees, and tie in how the money raised at the event will help us continue taking action on our issue campaigns. Also, don't forget to collect any remaining contribution forms or have folks donate using the online link before they leave.

After the Event

Report

Make sure to report in the link provided in your host guide after your event so we can hear how you did and help to track your donations. The online link will direct you to report both the total raised, pledged, and attendees as well as give qualitative feedback on how the event went.

Thank

Remember to follow up and thank all attendees and donors within 2 days of your event. They will be more likely to donate again!

Follow Up

Remember to follow up with anyone that pledged that hasn't donated yet within 2 days of your event.



Appendix: Step-by-Step Guides

How to Organize a House Meeting

Organizing a House Meeting

No matter which issues you care about and what action you take, you'll be more effective — and have more fun — when you get local supporters to take part with you. Often the best way to start is with a house meeting, where you can invite people who are interested in learning more about a topic, brainstorm plans together, and get firm commitments from people who are interested in taking action.

Hosting an event can also be a great way to meet new people in your area who care passionately about the same issues you do. Whether you're a first-time host or an experienced veteran, below are a few basic tips on how to have a successful house meeting.

Before the House Meeting

- **Decide** on a date, time, location and issue topic for your house meeting.
- Create an online listing for your event on barackobama.com/events.
- **Recruit guests.** Reach out to friends and family, but also be sure to ask them to invite their friends that you might not know. You may want to promote your event online as well as in local coffee shops or other areas that allow flyering or event postings. Be sure to invite more people than you plan on having, as not everyone who RSVPs will be able to make it, and always make confirmation calls for anyone who RSVPs.
- **Prepare.** Print any materials you'll need beforehand, and set up your space for optimal sign-in, flow and seating before your first guests arrive. If you'll be using a computer, speakers, or any other equipment for you meeting, but sure to test it beforehand in the space you'll be meeting so you know it's working properly.

During the House Meeting

- **Welcome the attendees** as they arrive, and ask them to sign in. Provide them with a brief overview of the agenda and be sure to make them feel comfortable.
- **Introduce yourself** to the group, and then go around and ask the attendees to introduce themselves and briefly state why they care about the issue being discussed.
- **Outline the issue** you've decided to focus on. Keep it brief, and don't feel like you have to be an expert on the issue. Be sure to cover:
 - 1** The problem. Start by addressing the problem at hand. What are you and your guests trying to fix with your organizing?
 - 2** The local connection: If you're focusing on a national issue like immigration reform or climate change, identify the local connection. How does the local community feel about the issue? Are there groups who are particularly affected or interested in the issue? What are your elected representatives' positions on the issue?
 - 3** The leverage point. Who are the people or local lawmakers who have the most control over the issue at hand, and how can you best move them?
- **Choose an action** and then begin the planning process with your new volunteers. Consider:
 - 1** What action can you and your guests take in your community to have the biggest impact on the issue at hand?
 - 2** Is this action realistic?
 - 3** Is it the best use of your time and resources?
 - 4** Don't feel like you have to solve the problem all at once — successful issue campaigns involve lots of small actions that build on one another over time.

- **Make a clear call to action.** Once you've identified the action you're planning on taking, get firm commitments from your guests to take part. People will be much more likely to commit now, while they're fired up and engaged in the issue, than they will be if you wait to follow up later.
- **Determine next steps.** Assign roles and responsibilities to members of the group. Exchange contact information and set up regular communication or check-ins to make sure every member of the team is on track. Give people clear next steps, and set a date for your next meeting or outing.
- **Share your success.** During your house meeting make sure to amplify your success by sharing photos and quotes of the new volunteers attending. Report out what action your house party group has committed to take.

After the House Meeting

- **Report the results of your house meeting.** Check in with your OFA organizer to tell them how many people attended and what actions you've planned as a result of your house meeting.
- **Enter data** into My Campaign to keep track of who attended the house meeting, and record their commitments for future actions in the My Campaign calendar.
- **Follow-up** with attendees to remind them of their commitment to take part in future actions and make sure they have all the information they need to make those actions happen.



Appendix: Step-by-Step Guides

How to Organize a Training

Organizing a Training

One reason organizing is rewarding is that it gives volunteers the opportunity to learn new skills and then apply them in the context of action. Planning a training for your chapter or team can take your organization to the next level as you engage new people in action or develop the skills of your current volunteers.



These eleven steps for organizing a training take you through planning, preparing, and executing a rewarding training for your volunteers:

Step 1: Establish Goals and Determine Audience

Your first step is figuring out what organizational objective you want to achieve for your training. From there, you can identify the appropriate audience. For example, if your primary objective is to get more people in the door who can take action with your chapter, your resulting audience would be supporters who are not yet volunteers or who have started volunteering very recently.

Step 2: Assess the training resources available

Organizing for Action has developed a number of training resources that are available for volunteer leaders to train other volunteers. This includes trainings on each of our issue campaigns, a multitude of organizing skills, and strategic planning guides. Before moving forward with your training, work with your OFA point of contact to assess the available resources and consider if they will fit your needs or if you need to develop new materials especially for your training’s goals.

Step 3: Create a Training Team

The biggest mistake you can make is to think you can organize and execute a great training on your own. What roles will you need to fill to plan and execute your training well? Below are some options — enlist volunteers to fill as many as make sense.

- Training lead (that’s you!)
- Location Coordinator
- Food Coordinator
- Breakout Coordinator
- Printing/Packets Coordinator
- Cleanup Coordinator
- Sign-in Coordinator
- Time Keeping Coordinator

In addition to filling these logistical roles, you also need multiple trainers. We recommend that you recruit at least one trainer for each section in your training. This helps keep the workload light for each trainer as well as gives participants exposure to a diverse set of voices, rather than just one person.

Step 4: Develop Skeletal Agenda

You know what your objectives are, you know what curriculum is available, and you have built a solid training team. Determine the duration of your training and the best logical order for training sessions. Then, assign trainers to modules. You can build your skeletal agenda by filling in a table like the below:

START TIME	END TIME	MODULE	TRAINER
		Welcome and Introductions	
		Debrief, Next Steps, Closing	

Step 5: Take Care of Logistics

Convene a meeting with your Training Team to talk through every single task that needs to happen in preparation and execution of your training, by when it needs to happen, and who is responsible for it. This creates a shared to-do list for your training team and makes it easy to monitor that preparations for your training are on-track. Make sure you’re thinking of everything in terms of food, supplies, and the venue.

On the day of your training there will be a lot of logistics to take care of, in addition to actually training your participants. So it’s helpful beforehand to create a staffing grid that lists every job that will need to be accomplished during the training and who will be responsible for making sure it’s done.

TIME	ACTIVITY	VOLUNTEER
8:30 – 9 am	Buy coffee	Jeff
9:00 – 9:30	Test projector and speaker system	Cassie
9:30 – 10 am	Registration table	Katie
10am – 10:30	Introductions	Patricia
11:30 – 12:00	Pick up lunch from sandwich shop	David

BRAINSTORM

List of every single task that would need to happen at a day-long training for your volunteers. What tasks could be done by the same person and what task would need to be done by separate people? How many people will you need to help you support your training?

Step 6: Recruit Participants

Recruiting for a training is just like recruiting for any other event — we have to make hard asks, recruit twice as many people as our attendance goal, make multiple rounds of confirmation calls and emails, and make hard asks. If yours is a Recruitment training (designed to bring in new people as opposed to developing skills of experienced volunteers), use your social networks and email list to recruit heavily for your training. Keep one rule in mind: if your training is longer than four hours, it’s probably going to take more than 3–4 days’ notice to get people to commit to attending, so recruit early and often!

Step 7: Customize Curriculum

Volunteers find trainings much more compelling when they address the situation in their own community. Every module of curriculum OFA produces is designed to be tailored to your state, so make a plan to go through all the materials and customize them as needed. You can do this yourself or delegate it to the trainers assigned to each module — just remember that ultimately you, the Training Lead, are responsible for making sure it is done! The last thing you want to have happen is to see a PowerPoint slide come up with the text “Insert local example here” on the day of your training!

Step 8: Practice Training Sessions

This cannot be emphasized enough. Every trainer should practice with an audience at least 3 times, in addition to practicing at home. The trainer will need to review the curriculum materials, practice what to say on every slide, and consider what questions or reactions might come from the audience and how to respond. More than any other preparation step, the degree to which trainers practice and prepare will determine how successful your training is at engaging your volunteers and moving them to action.

Step 9: Confirm Participants and Logistics

Your team should do two rounds of confirmation calls as well as two emails with all the logistical information leading up to the training event. You should also check in with your Training Team often to make sure everyone is on track with their assigned responsibilities.

Step 10: Train!

Take lots of pictures, and post them on Facebook and Twitter to share the success of your training!

Step 11: Celebrate, Evaluate, Learn and Improve

Make sure to collect an evaluation from all participants, and have an immediate debrief discussion with your training team right after the training, as well as a more extended debrief a few days later. Take note of your key lessons and takeaways, apply them to your next training, and keep getting better at what you already do amazingly!



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