



WELCOME TO **THE OFA PROFESSIONAL FELLOWSHIP**

| Power of Training at OFA

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Welcome from OFA National Training Director, Ashley Pinedo

My life changed when I became an organizer in New Mexico in 2008. I spent long days fighting for what I believed in, knocked on doors and talked about my cause with countless people, and built meaningful and lasting friendships. I had a blast. But the most important thing I learned to do was to help others unlock their own potential through training. My fondest memory is of María, a volunteer who took the skills I helped her develop and used them to run for local office. That's the power of training. That's why I am committed to helping train the next generation of progressive leaders, like María -- and like you.

I would like to take a minute to personally welcome you to the field management track of the OFA Professional Fellowship. You were selected among an extremely competitive group of applicants because of your organizing skills and experience, demonstrated commitment to the progressive world, and curiosity for people-centered, data-driven organizing.

Your Fellowship begins on Tuesday, October 6th and concludes with a Practicum in Chicago from Friday, November 13th to Sunday, November 15th.

To help you get your bearings, take a bit of time to read this guide. It's got information about what we've set out to do and a few operation principles, along with some nuts and bolts about how the program will run.

I could not be more excited to welcome you to our national training family. I look forward to witnessing your progress.

All my best,
Ashley

LET'S GET STARTED

Inside your **WELCOME PACKET**

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ABOUT OFA

We're community organizers,
and we're proud of it.

WATCH THE VIDEO



WHO WE ARE

We are a non-partisan, issue advocacy organization committed to growing the grassroots movement by training, educating, and activating civically engaged community members across the country. In short, we **support** grassroots chapters who organize around local issues. We strive to be the biggest **megaphone** in politics to drive engagement. We seek to **train** a diverse community of organizers to change the world. And in the process, we work to **engage** millions of people online around important progressive issues.

WHY TRAINING: POWER OF TRAINING AT OFA

OFA is dedicated to creating high quality talent at every level -- from recruiting and training activists to become skilled organizers to developing the skills of mid-and-senior-level staff throughout the progressive community. Our goal is to strengthen the pipeline of talent throughout the country with leadership development and training programs.

[Our Story](#)

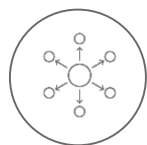


ABOUT THE PROGRAM

THE FIELD MANAGEMENT TRACK

The OFA Professional Fellowship is a five-week educational and training program designed for people interested in building their management skills and pursuing leadership positions in the progressive world.

The field management track of the program seeks to accomplish four key goals. By the end of the program you will:



Understand the role that a field manager plays at a progressive organization, and the strategic goals of a field program



Be able to write, adapt, and manage a people-centered, data-driven field plan



Feel confident hiring and managing a team of field organizers to execute your field plan



Be one click away – whether that is a Google search or an email to an expert – to any related question that might come up

FIELD MANAGEMENT 101 | Tuesday, October 6th

As a field organizer you were responsible for executing a field plan under the guidance of your regional field director or organizing director. As a field manager for a ballot measure campaign, you are responsible for writing the field plan that your team of organizers will execute. In this session you will learn what is the role of a field manager, and understand the basic framework of a ballot measure field plan.

CREATING A VOTER UNIVERSE | Tuesday, October 13th

Your field plan revolves around a win number, which is the total number of votes you need in order to win on Election Day. However, resources, staff, and time are always limited and you are not likely to talk to every single expected voter. As a field manager you will likely learn from a data team which voters you need to talk to in order to get 50%+1. In this session you will learn what criteria is considered by the data team when creating a voter universe.

GETTING TO YOUR WIN NUMBER | Tuesday, October 20th

Once you lock your voter universe, you must determine how you will invest resources, allocate staff, and work with volunteers to talk to all your targets at least once by Election Day. In this session you will learn what to consider when writing your targeting strategy – who you should target, how you should target them, and at what point in the cycle.

CREATING CAPACITY | Tuesday, October 27th

Campaigns typically do not have the resources or time to talk to and turn out their entire voter universe using only staff. In this session you will learn how to build a strong and sustainable organizing model that allows you to integrate volunteers, political leaders, different constituencies, and staff in order to talk to everyone in your voter universe at least once by Election Day.



BUILDING A RAMP AND TIMELINE | Tuesday, November 3rd

Any campaign is like a ramp -- the closer you get to Election Day, the more resources, capacity and voter attention you have. Your field plan must follow this ramp accordingly. In this session you will learn how to create a timeline that uses resources, builds capacity, and talks to voters incrementally from day one through Election Day.

BUILDING YOUR TEAM | Thursday, November 5th

Hiring a team of rockstars is one of the most important aspects of your field plan. In this session you will learn what qualities to consider when hiring a team of organizers, as well as how to structure a job interview that helps you identify the must-haves over the nice-to-haves.

MANAGING YOUR TEAM | Tuesday, November 10th

While team members come together under the leadership of a manager, not all team members bring the same experiences, skills, and personalities to the team. In this session you will learn how to manage each member of your team effectively by considering their various skills and personalities, while helping them achieve their maximum potential.





CHICAGO PRACTICUM

Friday, November 13th	Field Management Simulation and, Evening Reception
Saturday, November 14th	Field Management Simulation and, Ballot Measures Summit
Sunday, November 15th	Professional Development and Closing

WHAT YOU WILL LEARN

The Chicago Practicum is a unique opportunity for Professional Fellows to experience the role of a professional field manager. On Friday, November 13th, you will participate in a day-long simulation where you will use skills learned throughout the online phase of the program to solve scenarios typically experienced by field managers. Throughout the simulation you will receive first-hand coaching from organizing experts.

RESUME WRITING FOR FIELD MANAGERS

Not all resumes are equal. The two-day practicum concludes with a hands-on resume and writing session. You will leave Chicago with a resume that highlights your talents as an organizer and field manager.

GETTING TO CHICAGO

Please review the Travel Logistics section of this Welcome Packet to learn more about booking your flight to Chicago, available hotels and hostels close to the training site, and travel scholarships.

[Travel logistics](#)



SIMULATION

SIMULATION-BASED LEARNING

As part of the Fellowship, you will engage in a program-long simulation. This means that all of your weekly assignments, including your Chicago Practicum experiential activities, will take place in the context of a fictional non-profit organization, where you work as a field director. By engaging in this simulation, you will be exposed to real-world situations you are likely to confront as a field director at a progressive organization. Read on to learn more about the fictional organization for which you work, and your role as a field director.

WELCOME TO CLIMATE STRONG

Welcome to Climate STRONG (CS), a national, non-partisan climate-advocacy organization. CS is enthusiastically growing the climate movement by training, educating, and mobilizing community members across the country. We strive to hold decision makers accountable for their stances on climate and the key votes they take on the issue. As a grassroots driven organization, Climate STRONG is committed to utilizing digital tools to provide climate organizers with the skills and tools needed to turn climate-change denial into something that is socially and politically unacceptable.

YOUR ROLE AS A FIELD MANAGER AT CLIMATE STRONG

As a field director at Climate STRONG you are running a climate issue campaign. You are responsible for writing a campaign plan to get the organization's message out through direct voter contact. Your main responsibility is to develop a comprehensive plan that includes knocking on doors and phone banking to identify voters and persuade them for the issue campaigns Climate STRONG works on. You are also responsible for hiring and managing the team of organizers who will help you execute the campaign.

You will learn more about the specific campaign parameters during your webinars. You will ultimately develop and write a comprehensive field plan. Each week, you will produce one section of the plan based on what you learned in class.



TRAINERS



JENNIFER WARNER
National Organizing Director, OFA



STEVE PRESTON
Field Director, Jim Kenney for Mayor



JUSTIN SOMMER
Strategic Data Coordinator, SEIU



DANNY LUCIO
Google Digital Inclusion Fellow



ASHLEY PINEDO
National Training Director, OFA



VICTORIA ZYP
Mobilization Project Director, Airbnb



PROGRAM LOGISTICS

CLASS ATTENDANCE

- You are expected to attend all live sessions of the webinars
- Webinars are at 7:30 PM Central and last 90 minutes
- If you are unable to attend a webinar, notify Aquiles before class

DISTRIBUTION OF MATERIALS

- If you miss a class, you are expected to review the material presented on the live webinar, and watch the video recording archived on the online bookshelf
- Class materials and recordings are available following the live webinar

OUR TRAINING TECHNOLOGY

For our online classes we use two different platforms simultaneously: NewRow for video, and Maestro for audio. Please review the webinar guide to learn more about how to access both platforms.

[Webinar guide](#)

STAYING CONNECTED

If you have any questions or concerns, we encourage you to follow OFA's communication culture: first try to find the answer yourself, second ask one of your colleagues, third reach out to the program manager – Fellows@Barackobama.com





RULES TO LIVE BY

The following rules and norms will help you get the most from your experience as a Professional Fellow!

Keep asking yourself: How will this training program help me accomplish my future professional goals?

Love being a training nerd: You will learn a lot throughout your experience. Take every opportunity to learn not just how we do things, but why (as well as why we DON'T do things a different way). Being nerdy and obsessive over the minutiae helps make a stronger program.

You represent the President – Be Professional: OFA represents the voice of President Barack Obama. As an OFA Fellow, you are expected to behave professionally online and offline. Be respectful of other people and the program. Follow-up on your commitment and submit materials on deadline (or before)! If you must retire from the program, please be honest and let us know immediately so we can adapt our plans accordingly.

Have fun! Most importantly, have fun! You were selected among many applicants to learn from some of the best digital organizers and strategists in the business. Give them your best and enjoy yourself in the process.

OUR LEARNING COMMUNITY

From New York to California, Texas to Chicago, each member of this fellowship class will contribute a unique skill-set and experience to our learning community. Make the most of this learning experience by reaching out to one another to exchange ideas, collaborate on assignments, and offer peer review.



Adrian Segura | IL



Andrew Greenberg | CO



Benjamin Gellman | MI



Beverly Schreiber | NY



Caryn Cleeland | IL



Elizabeth Henderson | TN



OUR LEARNING COMMUNITY



Francesca Austin | TX



Howard Carter, III | FL



Jeremy Taylor | PA



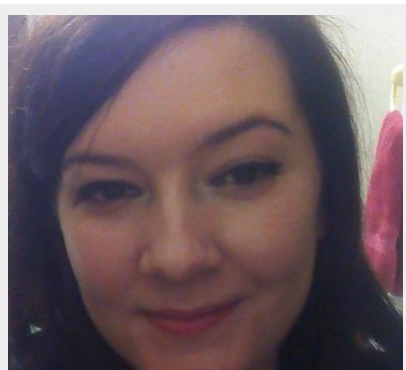
Jim Brobst | PA



Jimmy Liacos | PA



Jomar Floyd | FL



Jordan Hunt | MO



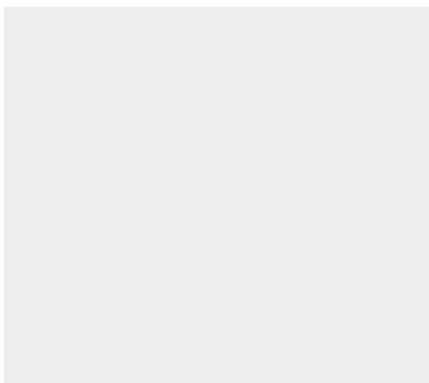
Jose Del Rio | CA



Kevin Phelan | CT



OUR LEARNING COMMUNITY



Lexie Weaver | OR



Marielle Ali | NY



Marika Bresler | IA



Mary Darling | AZ



MaryAnn Piccioni | PA



Matthew Bowles-Roth | IA



Nekpen Osuan | NY



Curtis Olson | Canada



Rau Scott | OR



OUR LEARNING COMMUNITY



Reggie McKoy | VA



Renee Hagerty | OH



Ryan Adams | IA



Shivanna Harridan | FL



TRAVEL LOGISTICS

DATES AND TIME

Friday, November 13th | 5:30 PM – 7:30 PM

Saturday, November 14th | 9:00 AM – 5:00 PM

Sunday, November 15th | 9:00 AM – 2:00 PM

TRAINING LOCATION

**1130 W. Monroe St,
Chicago, IL 60661, 5th Floor**
[Google Maps Directions]

TRAVEL SCHOLARSHIP

If you applied for a travel scholarship, we should be in touch with you soon with next steps. Remember that travel scholarships only cover your flight. You are responsible for your own accommodations. Travel scholarships are gifted by very generous donors, are non-refundable, and cannot be cancelled.

If you are covering your travel costs, please go ahead and book your travel at your earliest convenience. You should plan to be in Chicago for the evening reception on Friday, November 13th. You should plan to stay in the city until the Practicum ends on Sunday, November 15th at 2:00 PM Central.

CHICAGO ACCOMODATIONS

The following are accommodation suggestions that are affordable, close to the training site, and easily accessible on public transpiration. Make sure to also checkout [Airbnb.com](#)

Chicago Parthenon Hostel | 1 Mile from Training Location
www.ChicagoParthenonHostel.com

[Google Maps directions to training site]

Hostelling International | 1.9 Miles from Training Location
www.Hiusa.org/Illinois/Chicago/Chicago

[Google Maps directions to training site]

Crown Plaza Chicago Metro Downtown | 0.6 Miles from Training Location
www.IHG.com

[Google Maps directions to training site]



NEXT STEPS



Please download, sign, and submit your Nondisclosure Agreement by October 6th.

Organizer Tip: Download Genius Scan on your phone to scan and upload your signed NDA.

[Download NDA](#)

[Upload NDA](#)

FIRST WEBINAR: See you on Tuesday, October 6th at 7:30 PM Central

[Access class](#)





“**One voice** can change a room, and if one voice can change a room, then it can change a city, and if it can change a city, it can change a state, and if it can change a state, it can change a nation, and if it can change a nation, it can change the world. Your voice **can change the world.**”

| President Barack Obama



POWER OF TRAINING AT OFA