Annotated Agenda

**OFA Chapters**

**TIME ALLOTTED: 90 Minutes**

**PRESENTER(S):**

**MATERIALS NEEDED:**

* Projector and PPT (usually)
* [Handout] Building OFA Chapters & Teams: Phases & Snowflakes

**GOALS FOR THIS SECTION:**

* Understand OFA strategy behind building our organization in chapters with teams
* Be able to strategize and plan how to develop a chapter through issue advocacy actions
* Be confident strategizing your local chapter’s development according to your community’s needs

**AGENDA**

**0:00 – 0:11 Introduction**

0:00 – 0:04 Personal story introduction

* **[Slide 1]** [Each presenter should give a two-minute version of their personal story as relevant to chapter and team building. Remember to include challenge – choice – outcome into your story and practice it like any other section of the training. Because this section relates to building chapters, try to relate your story to chapters or making the switch from electoral to issue organizing.] Because of this experience, I know that as OFA embarks on a path towards building issue advocacy campaigns it will be important to build a strong organization on the local level that will help us reach our goals.

0:04 – 0:06 Introduce session and goals

* **[Slide 2]** Now that we’ve reviewed where we’ve been and where we’re going, and we understand how to build successful issue advocacy campaigns, in this session we will talk about how to structure our local organization in order to sustain the level of activity that will be required to meet our goals. By the end of this session our goal is that you:
  1. Understand OFA’s strategy behind building our organization in chapters with teams.
  2. Are able to strategize and plan how to develop a chapter through issue advocacy actions.
  3. Are confident strategizing your local chapter’s development according to your community’s needs.

0:06 – 0:07 Agenda review

* **[Slide 3]** So to review what we’re going to talk about in this session:
  1. We’ll complete our introduction,
  2. Then talk about how this organizational structure has developed and will continue to develop.
  3. Next we’ll lay out how chapters grow through their actions and structure.
  4. After that we’ll get to look at some scenarios that are similar to challenges people face in our state as we develop our teams.
  5. And then we’ll finish up looking at some case studies of how the chapter organization has grown in other states and consider how it might grow here!

0:07 – 0:12 Power of Empowerment: How do you turn off the Internet?

* **[Slide 4]** Before we dive in though, we want to take a moment to do a thought experiment.

1. Our question for you to ponder is “If someone asked you to turn off the Internet – and we’re talking about the whole Internet everywhere in the world – how would you instruct her to do it?” Take a few moments to think about it and jot down some notes if you like. [Give people 20-30 seconds to consider].
2. Ok, who has an idea of how we can turn off the Internet? [Have someone explain his or her idea for turning off the Internet.] Hmm, well that’s a pretty good suggestion for solving a tough problem. Does anyone see a challenge to what [volunteer’s name] is suggesting? [Speaker or audience challenge the volunteer’s suggestion.]
3. **[Animation cue]** Right, so clearly there would be some challenges to turning off the Internet. What were some of the other challenges you thought of in realizing why it would be hard to shut down the Internet and keep it off? [Take short popcorn style responses from the audience.]
4. Exactly. The Internet would be impossible to turn off completely because there are so many points where it is generated and so many people have knowledge about how to access it. Our strategy at Organizing for Action is the same. We want to build our organization so that this movement is also impossible to turn off. That means empowering volunteers to take leadership roles in chapters and teams and build specialized skills so that organizing on our issues is powered from every part of the country.
5. **[Animation cue]** This is the power of empowerment.

**0:12 – 0:23 How our structure has developed**

0:12 – 0:16 History of Neighborhood Team model in OFA

* **[Slide 5 + Animation Cue]** Now we’ll talk about how our chapter and team structure developed.
* **[Slide 6]** Many of you may be familiar with organizing on the neighborhood team model.
  1. During the South Carolina primary campaign the Obama field team realized that in order to register and turnout the voters they’d need to win, they’d need more organizers in the state. So the leadership there drew upon best practices from traditional community organizing in the progressive movement – that the best way to carry a change-message and increase capacity is to empower community members to organize their neighbors. They began building neighborhood teams that entrusted volunteers to become organizers and leaders for the campaign in their community.
  2. Now, after the model was successful in the South Carolina primary, other states experimented with it during the primary and it brought them success.
  3. Because of its success during the primary, the team model was used all over the country during the 2008 general election.
  4. After the election, Organizing for America used the team model with an additional volunteer leadership role of a “Community Organizer” to function like field organizers did during the general election.
  5. In the 2010 midterm campaigns Organizing for America continued to use neighborhood teams, and of course in 2012 it was the focus of the Obama campaign’s organizing model.
  6. Now Organizing for Action is taking lessons from the neighborhood team model and adapting them to build chapters in this new context of issue organizing.
  7. **[ANIMATION CUE]** What we have seen across all these years is that organizing is strongest when it empowers community members to lead their neighbors in action.

0:16 – 0:19 Reality and Perception

* **[Slide 7]** As we think about how Organizing for Action will utilize this structure for empowerment, we must consider how electoral organizing is different from issue organizing.
* **[Animation cue]** In electoral organizing the reality of what voters want is very apparent because their voices are heard at the ballot box on Election Day. So the goal for the electoral campaign is clearly to maximize the number of votes they will receive. Campaigns track this, and there is a real number of voters who have pledged to vote for the candidate, and a real number the campaign needs to win. To get to that number, the most important goal for an electoral campaign is knocking doors so they can win more votes. In this context, the more neighborhood teams there are means there are more leaders who can coordinate more volunteers to knock more doors, and as we said – knocking more doors leads to more votes. So for an electoral campaign, the more neighborhood teams the better.
* **[Animation cue]** In the context of issue organizing the connection between what the voters care about is not always clear to decision makers. To be in successful issue organizing, Organizing for Action needs to make sure the perception of decision makers matches how their constituents feel about the policy issue in question. To do that, our most important tactical goal is having quality earned media events. But an earned media event generally needs to be coordinated at the geographic level of a media market, which is much bigger than a neighborhood team turf. For this reason, we need an organization that brings together volunteers from all over a given media market to coordinate high quality earned media. In this context, more chapters are not necessarily better because it could lead to overlap and discordination. For issue organizing, having quality, developed chapters is more important than having a great quantity of teams.

0:19 – 0:23 Principle of form following function

* **[Slide 8]** So, as you can see from this example, using a chapter structure to coordinate neighborhood team volunteers grows out of the strategic requirements of the type of issue organizing we’re doing. This principle that form should follow function is foundational to how OFA will grow as an organization. We know that organizations are strongest when they are responsive to the situation they encounter in each community.
  1. The neighborhood team model developed because it was the right structure to meet the campaign’s capacity and needs.
  2. Organizing for Action is building the form of our organization to meet the unique needs of each community.
  3. Because of this, our organizational structure develops differently in each community.
  4. **[Animation cue]** But some best practices have already emerged, and we’ll be talking about some of those best practices for structure today.
* **[Slide 9]** So, just to give some perspective on where these best practices are coming from, I want to tell you about how the chapter structure has emerged from OFA actions on the ground.

1. When Organizing for Action was first launching, we developed pilot programs in four states in order to test what structures worked best.
2. Shortly afterwards, chapters and teams began organizing in many states and we watched how they grew up organically and what organizational methods were helpful.
3. From these real examples, we’ve taken away some key findings.
   1. First is that states will start from different points of development. This means that they’ll develop differently given their starting point.
   2. Also, states will structure their chapters based on their unique needs and resources.
   3. But one thing that was shared in all states is that they needed an organizational unit larger than a neighborhood team in order to coordinate large-scale projects that impacted a larger area than any neighborhood team turf. This was a challenge inherent to OFA’s new function of issue organizing, and is why we decided to utilize the chapter model to coordinate the actions of volunteers and neighborhood teams.
   4. Finally, we’ve seen over and over that the experience and local community knowledge of volunteers is critical to determining how each chapter will develop and grow and its best internal structure.

**0:23 – 0:43 Responsibilities and Development of Chapters and Teams**

0:23 – 0:26 Levels of organization

* **[Slide 10 + Animation cue]** Now we’re going to move on and talk more in-depth about what chapters and teams do in this new model and how they are developed.
* **[Slide 11]** First let’s talk about how three levels of organization will work together in our structure.

1. Every state will have a state lead or state coordinator who works with national HQ to make sure efforts in state coordinate with each other and with the national organizing strategy on each issue campaign. As part of this state structure, volunteers – and in limited cases some staff – will also help in providing resources to chapters and teams in the state, and will coordinate with statewide allied organizations to create strategic coalitions on our issue campaigns.
2. Chapters will be formed to coordinate actions that impact a larger area, for example an entire city or media market. Volunteer leads at the chapter level will coordinate the actions of neighborhood teams, and provide leadership training and resources for their members to empower them to take initiative in their issue campaigns.
3. Neighborhood teams will continue to play a role in the structure, executing issue organizing actions that impact just the neighborhood team’s community. They will provide their members training on organizing skills the team utilizes. Also, an important function of neighborhood teams will be to contribute to chapter-wide actions, often taking responsibility for aspects of large events.
4. Of course, it will take time to develop all these levels of organization so some states will have only one or two levels of this organization to start. Form will follow function in how this organizational model is built in each state.

0:26 – 0:31 What do chapters do

* **[Slide 12]** So, what is new to many people about this structure will be the chapter. So let’s talk next about what chapters will be asked to do to execute our strategy in our issue organizing campaigns.
* You’ve heard a lot about chapters and why this unit of organization is important in issue advocacy. So let’s brainstorm together what the responsibilities of chapters would be. Please turn to your neighbors and find a group of three. Take two minutes to brainstorm what you think some of the responsibilities of a chapter would be. [Give participants two minutes to discuss.]
* Ok, let’s come back together as a big group. I’d like to hear from a few groups what you laid out as responsibilities for chapters. Just give me one per group. [Have participants raise hands and call on several. Move quickly between participants. Positively reinforce suggestions that are appropriate for chapters. If an action is more appropriate for teams, say that the action is important but will be more relevant when you get to talk about the responsibilities of teams.]
* **[Animation cue]** This is great. You have all outlined most of the responsibilities of teams that I’ve written out here on the slide. Just so you know, these are also on the your handout titled “Phases & Snowflakes.” The biggest take-away is that chapters are coordinating activities that are too big to be owned by any single team and need coordination across a bigger geographic turf. Also, chapters are working on multiple issues and actions including grassroots fundraising, digital organizing, earned media events, and allied organization outreach.

0:31 – 0:35 Chapter snowflake

* **[Slide 13]** So these are a lot of responsibilities, right? The chapters have a lot of responsibility, so the only way to be able to do it all is to empower many volunteers to take leadership and specialized roles within our chapter. This snowflake shows some of the roles within a chapter snowflake.

1. In the center of course there is a chapter lead. The chapter will have one point person who will communicate with the state organization and help coordinate activity between all the other chapter members.
2. The light blue circles on the right show some of the core baseline roles in the chapter. These people perform specialized functions our chapters will need including coordinating press outreach, managing digital organizing efforts, providing trainings for members, making sure data is maintained, and spearheading fundraising efforts. These core baseline roles help the chapter perform some of its main responsibilities and provide resources to members.
3. The dark blue circles on the left represent issue campaign leads. These leads will be the point people on the chapter’s efforts for each of the active issue campaigns, and will work with volunteers and the core baseline leads to bring together all aspects of issue organizing actions. Your OFA point of contact will tell you which of these issue campaign leads are critical for your chapter based on OFA’s strategy and your chapter’s role in the path to 60 and 218.
4. The green circles at the bottom represent Neighborhood Team Leaders. Each of these NTLs will coordinate a team of volunteers with a geographically defined neighborhood turf that is part of the larger chapter turf. The NTLs will lead their team members in local actions. The number of neighborhood teams will vary by the needs of the chapter’s turf and the stage of development.
5. This snowflake represents a large and developed chapter. Let’s take a look at some phases of develop that can help us understand how a chapter can grow into a snowflake like this!

0:35 – 0:40 What do chapters do?

* **[Slide 14]** As chapters have begun to develop, we’ve seen them move through five distinct phases of chapter development. These phases are also described on your handout.

1. **[Animation cue]** The first phase is potential. At this point there are volunteer prospects in the chapter’s turf, but they are not working together to carry out any of the functions of a chapter.
2. **[Animation cue]** In the next phase the chapter is budding. Volunteers are working together, and volunteers are serving as point people for various responsibilities, but none have official roles or titles yet.
3. **[Animation cue]** In phase three the chapter becomes a certified chapter. Four of the six core lead titles are filled, and at least one Issue Lead role is filled. And for those of you in the chapter management track, you’ll get more information this afternoon about the chapter certification process.
4. **[Animation cue]** From here, the chapter becomes established. In this phase, all six Core Lead roles as well as all Issue Lead roles needed for that chapter are fulfilling 90% of all the responsibilities of a chapter.
5. **[Animation cue]** The final phase of development is a sustainable chapter. In this chapter volunteers are carrying out all of the functions of a chapter. They’ve filled all of the core lead and issue lead roles and have at least three neighborhood teams who take ownership over different projects and recruit new volunteers and leadership prospects within their team turf.
6. Again, we know that every chapter will develop at its own pace and through specific variations of this model. But these phases will help you think of how to strategically grow your team into a sustainable chapter taking regular action and with many members and empowered leads! Every action that you take should help develop your chapter to the next phase, and when you’re planning actions you should ask yourself how it’s helping you develop.

0:40 – 0:43 What do teams do?

* **[Slide 15]** Now that we’ve defined what a chapter does, let’s repeat our brainstorming exercise as we consider what responsibilities neighborhood teams have. Remember that teams are components of chapters. Try and find two people near you, different from the people in your first group, and take two more minutes to brainstorm what distinct responsibilities a neighborhood teams have within the chapter model. [Give the groups two minutes to discuss.]
* Ok, let’s come back together as a big group. I’d like to hear from a few groups what you laid out as responsibilities for teams. Again, just give me one per group. [Have participants raise hands and call on several. Move quickly between participants. Positively reinforce suggestions that are appropriate for teams. If an action is more appropriate for chapters or is not relevant to issue organizing, mention that it doesn’t belong in the neighborhood team responsibilities.]
* **[Animation cue]** Fantastic. So you’ve covered all the responsibilities that I have here on the slide, and some other good ones. The biggest take-away is that generally neighborhood teams are coordinating activities that impact their local neighborhood turf and involve direct contact with community members in their neighborhoods.

**0:43 – 1:04 Chapter Development Scenarios**

0:43 – 0:45 Explain exercise and worksheet

* **[Slide 16 + Animation cue]** So we’ve talked a lot about the theory of how to develop chapters, now we’re going to let you work through some chapter development scenarios.
* **[Slide 17]** In a minute I’ll show some scenarios about chapter development on the screen, but first let me lay out the exercise.

1. After I explain the instructions, you’ll break into groups of four people.
2. First, read the scenario.
3. Then, assess the chapter’s current phase of development. You have definitions for all the phases on your handout.
4. Because of the importance of form following function, there may be some more assumptions that you make about the scenario. For example how many current volunteers are active or whether there is a supportive Member of Congress in their city. Just take notes of any other assumptions you make about the scenario.
5. Then plan some steps and actions that this chapter can take to develop to the next phase
6. **[Animation cue]** And remember! Form should always follow function, so take into consideration what step is going to best address the scenario facing this chapter!
7. You’ll have a total of 3 minutes for each scenario, and we’ll do 3 scenarios total. It’s best if every member of the group takes some notes so you can remember what your group talked about. If you have any questions while you’re working you can ask us facilitators. Ok, find a group of four people to work with! Let’s start!

0:45 – 0:46 Divide room into groups of 4 people

0:46 – 0:56 Participants work through the scenarios

* **[Slide 18]** [Walk around the room while participants work through scenario 1. Give a warning when two minutes have passed. Then, after three minutes have passed, make an announcement.]
* **[Slide 19]** Okay folks, we’re going to go ahead and move on to Scenario 2. If you can turn your attention to the screen, we now have the second scenario up here.
* [Walk around the room while participants work through scenario 1. Give a warning when two minutes have passed. Then, after three minutes have passed, make an announcement.]
* **[Slide 20]** Alright everyone, we’re going to switch to the third scenario now. Same drill - you have three minutes to work through this scenario. [Walk around the room while participants work through scenario 1. Give a warning when two minutes have passed. Then, after three minutes have passed, make the next announcement.]

0:56 – 0:59 Group members find partner from another group to discuss results

* **[Slide 21]** Okay, please wrap up your conversations. Now we’re going to have group members share what their group worked out. Please find a member of another group and discuss what your team came up with for each scenario. You’ll have three more minutes to discuss and then we’ll come back together as a big group to share some of the best ideas you hear! Ok, go find yourself a partner from another group!
* [Give time reminder when there are 30 seconds left]

0:59 – 1:04 Debrief with whole room on phases and best ideas participants heard

* I heard some great ideas while I was walking around. Let’s talk through these scenarios.

1. For scenario one, what phase of development did you decide this chapter is at? [Let participants yell out an answer and listen to what the consensus is.]
2. Ok, it sounds like people think phase two. Who can tell us why their group said this is a phase two chapter? [Choose a participant to explain why.] Yup, that sounds right.
3. Now, who heard a great idea from their group or another group about how to move this chapter from phase 2 to phase 3? [Choose participant to explain.] Yeah, that is fantastic.
4. Let’s move onto scenario two. What phase of development did you decide this chapter is at? [Let participants yell out an answer and listen to what the consensus is.]
5. Ok, it sounds like people think phase one. Who can tell us why their group said this is a phase two chapter? [Choose a participant to explain why.] Ok, that makes sense.
6. Now, let’s hear someone’s plan to move this chapter from phase 1 to phase 2 and get them organizing. Who heard something great? [Choose participant to explain.] That’s a great plan. Thank you.
7. So finally, for scenario three. What phase of development did you decide this chapter is at? [Let participants yell out an answer and listen to what the consensus is.]
8. Ok, it sounds like people think phase one. Who can tell us why their group said this is a phase two chapter? [Choose a participant to explain why.] Yeah, even though this chapter has a very different situation than that in scenario 2, this is also a budding chapter.
9. Now, how are we going to move this chapter from phase 1 to phase 2? [Choose participant to explain.] That’s fantastic. Thank you.
10. So in your different areas of the state you’ll all be facing your own scenarios that shape the best way to form and develop your chapter structures. You’ll be thinking critically in the same way we just did about how to move your chapter through the phases of development.

**1:04 – 1:18 Case Study**

1:04 – 1:05 Reiterate OFA principle of form following function in chapter building

* **[Slide 22 + Animation cue]** Now we’re going to look at some real-life scenarios and consider how some states have begun to organize and activate their chapters and teams. Here again we’ll see that the way they structured their state organization and the way they developed depended on the needs and resources they had in state. Form follows function!
* **NOTE FOR CUSTOMIZATION:** Feel free to replace these case studies of other states with examples of how chapters have developed in your own state. Also, you may choose to include only case studies from states that resemble your own so they’ll be most similar to the chapter structure you want to build.

1:07 – 1:11 Case study: Missouri

* **[Slide 23]** So let’s start with Missouri. Missouri has two large cities – St Louis and Kansas City – and those cities both are in their own media market for earned media purposes. Outside of these two cities there were very few volunteer prospects or leaders.

1. In the two large cities volunteers came together to hold earned media events to influence Members of Congress on our issue campaign days of action.
2. In these two large cities there were established neighborhood teams who had worked together in the past, but the state’s strategy focused on chapter-level earned media events. So that hosts could rotate among the volunteers and no group of volunteers became overwhelmed, the neighborhood teams rotate host duties for earned media events. For large events neighborhood teams take on portions of the responsibility in order to divide up the work.
3. In the future Missouri will probably go back and build chapters in the areas outside of the two big cities, but for this state it makes sense to first build strong chapters in the biggest population centers before working with potential chapters in more rural areas.

1:11 – 1:14 Case study: Ohio

* **[Slide 24]** For our next case study we’re going to talk about Ohio.

1. Ohio was a large battleground state in 2012 with more than a thousand neighborhood teams. Volunteers felt a strong allegiance to their neighborhood team and didn’t want to drive outside of their neighborhood for meetings.
2. At the same time, volunteers understood the importance of coming together to coordinate actions for earned media at a citywide level, and would help with larger actions.
3. The neighborhood teams remain an entry point for volunteers into OFA, but a majority of the organizing happens at the chapter level.
4. The rural areas of Ohio offer another interesting case. While they are in a single television media market, because the geographic distance between communities is so great, the message that works in one town won’t work in another. There are also opportunities to get earned media coverage through small town papers that are influential with local residents. So in this part of the state, a chapter still exists for the area of the entire media market, but the neighborhood teams are taking on more earned media actions in their local towns.

1:14 – 1:17 Case study: Minnesota

* **[Slide 25]** Ok, and our final case study is about Minnesota.

1. In electoral organizing, Minnesota had a relatively small campaign staff and neighborhood team structure and volunteer base. As Organizing for Action got started, many new volunteer prospects signed up in response to initial digital calls to action, for example email blasts and pushes on social networks. So the volunteer base was largely new to organizing and particularly interested in issue advocacy.
2. The majority of the volunteer sign-ups centered in Minneapolis, so in the beginning OFA centered all of its volunteer actions in Minneapolis. It made sense to first build the organization up in one area before trying to organize other areas.
3. As organizing in Minneapolis has become established, volunteer prospects in other parts of the state have been engaged and started taking action.
4. The take away from this case study is that even states that had relatively small organizations in electoral campaigns in the past are building up their chapter structure as is appropriate for the interest and needs in their state.

1:17 – 1:18 Case Study: Our state!

* **[Slide 26]** As you’ve seen in the scenarios and case studies, we’re dedicated to building Organizing for Action’s grassroots structure in a way that answers the needs of our campaigns and makes the best use of our volunteers’ time and talents.

1. Form follows function, so chapters in your state will grow according to our state’s needs and resources.
2. We’ve learned best practices from our organizing so far in OFA, and that’s where the sample snowflake and phases of team development come from.
3. We’ll continue to learn more best practices in growing our organization from you!

**1:18 – 1:30 Debrief**

1:18 – 1:21 Reflection

* **[Slide 27 + Animation cue]** Now let’s wrap up and debrief all this information we’ve covered
* **[Slide 28]** Now we’re going to do a little bit of reflection. Take two minutes to consider the opportunities that will help your area build a strong OFA chapter. How can they be used to build the chapter? Also consider any challenges that a developing OFA chapter in your area may face. How could you address them?
* [Give participants a 30 second warning when their time is almost up]

1:21 – 1:26 Share feedback

* Ok, let’s hear some of the things you put down for opportunities. [Have 2-3 participants share].
* And let’s hear some things you put down for challenges and how you’d solve them. Make sure you let us know your solution as well. [Have 2-3 participants share]
* Thank you so much for sharing!

1:26 – 1:30 Key Takeaways

* **[Slide 29]** So, to go back to some of the key take-aways from this section [read bullets]:
  + Number 1, the chapter structure helps OFA achieve new strategic goals around influencing key decision makers.
  + Number 2, issue advocacy actions help OFA chapters develop into more advanced and sophisticated organizations.
  + And number 3, the needs and resources of each community will help determine the best form for its OFA chapter.