BUILDING OFA CHAPTERS

*Phases & Snowflakes*

One of the principles of Organizing for Action chapter and team development is to build the form of chapters and teams to match the function required to meet strategic issue organizing goals in the community. The below phases describe stages in development of chapters and teams, and accompanying diagrams show samples of how some successful chapters and teams are structured.

**Chapter Phases of Development**

When full-developed, OFA chapters are expected to:

* Coordinate activity at a chapter level as well as the team level when appropriate
* Communicate directly with both state leadership and neighborhood team leadership
* Hold discussions with chapter-area leaders of partner issue organizations and elected officials
* Oversee programmatic fundraising at both the chapter and team level
* Ensure digital content is being collected and created at the chapter and team level
* Oversee training within chapter and of neighborhood teams
* Build relationships with press at chapter level and send out press releases

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

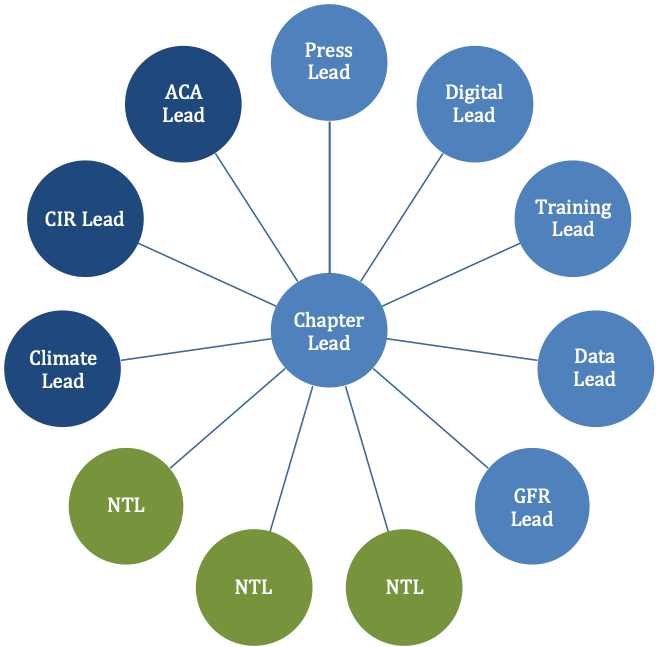
**Phase 2: Budding Chapter -** Volunteers are working together and have identified a common desire to form a certified chapter. They are carrying out up to 50% of the functions of a chapter. Some volunteers are serving as point people on various responsibilities, but none have official roles or titles yet.

**Phase 3: Certified Chapter -** Volunteers are working together and have received chapter certification. They are successfully carrying out around 75% of the functions of a chapter. Through demonstrating their ability to carry out the responsibilities associated with various roles, many volunteers within the chapter hold the title of Lead (Chapter Lead, Data Lead, etc). 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 certified chapter status, 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 certified chapter status, 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 team turf.

**Sample Chapter Snowflake**



Varies by chapter depending on priorities

Each manages a team. Number of teams per chapter will vary.

Core baseline roles

**Neighborhood Team Phases of Development**

When full-developed, OFA neighborhood teams are expected to:

* Carry out and implement all activity (strategy and tactics) at a local level
* Communicate with chapter level and inform and communicate strategy and tactics to volunteers
* Work on the ground directly with volunteers from issue organizations as well as keep in contact with elected officials’ offices
* Carry out smaller team-based fundraisers and fundraising activities at a local level
* Ensure digital content from team’s activity is created and collected, sent up to regional level
* Ensure volunteers are trained to carry out organizational strategy and tactics
* Find volunteers and help to coach them to speak to the press about team’s activities on the ground

**Phase 1: Potential -** Volunteers and volunteer prospects exist, but are not working together to carry out any of the functions of a Neighborhood Team.

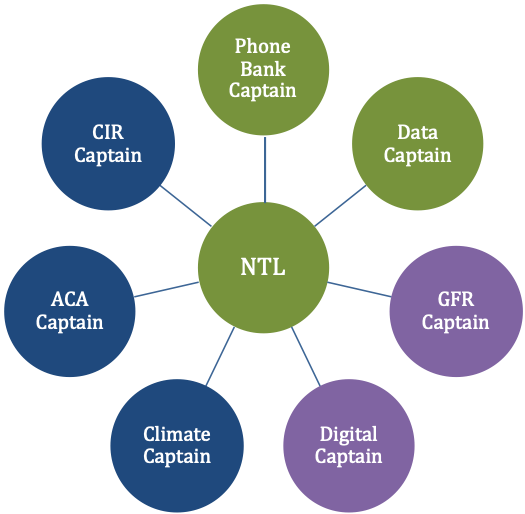
**Phase 2: Team in Formation -** Volunteers have started to get to know each other and are taking action together, but they do not yet self-identify as a team. Some volunteers emerge as prospective leaders through taking responsibility for various functions, but none have official roles or titles yet.

**Phase 3: Solidified Team -** Volunteers are taking action together and they self-identify as a team. They are successfully carrying out around two thirds of the functions of a team. Through demonstrating their ability to carry out the responsibilities associated with various roles, some volunteers within the team hold the title of Captain (Phone Bank Captain, Data Captain, etc.). Two of the three core leadership roles are filled.

**Phase 4: Developed Team -** Volunteers are taking action together, self-identify as a team, and are successfully carrying out all of the functions of a team. All three core leadership roles, as well as at least one additional Captain role, as needed by the team, are filled with tested and trained leaders who have demonstrated their ability to successfully carry out the responsibilities associated with that role. This includes the role of Neighborhood Team Leader.

**Phase 5: Ready for Mitosis -** Once a team has reached Phase 4, its Leader and Captains should start preparing for mitosis. This means they should think about how, geographically, the current team might split into two, and should prepare to groom a new set of leaders what would allow the team to split and still have core leadership in place on both new teams. The Neighborhood Team Leader should look to her Captains for a second Neighborhood Team Leader; the Phone Bank Captain should look to his volunteers for a second Phone Bank Captain, etc. The Leader and Captains should test and confirm new leaders in preparation for a split, being explicit about the fact that the split will occur. A Neighborhood Team is considered a Phase 5 Team when it has 2 people confirmed into each role.

**Sample Team Snowflake**



Core baseline roles

Varies by team depending on priorities

May exist on well-developed teams. Should not be filled until core roles are filled.