

**OFA-FL Q2 TRAINING PLAN**

TABLE OF CONTENTS

Overview 1

Goals 2

Programs 2

Staff Training 2

Staff Recruitment: Field Organizer Academies 6

Spring Organizing Fellowship 10

Summer Organizer Fellowship 13

Neighborhood Team Development Training 20

Neighborhood Team Conferences 21

Overall Program Timeline 24

Department Integration 31

Requests from Chicago HQ 32

OVERVIEW

The Florida staff and volunteer organization is going to grow dramatically in Q2, and our training plan must both facilitate and accommodate that growth. The key theme for our Q2 training plan can be summed up in two words: de-centralization and standardization. To date, the Florida field team has executed excellent trainings driven by leadership staff, with RFDs acting as trainers, and with little participation from volunteers as trainers. We have to make a shift in Quarter 2 toward a world where we execute excellent trainings driven by RFDs and FOs, with volunteer leaders acting as trainers. Only in doing so will we build an organization large and sophisticated enough to achieve our vote goal through registration, persuasion and turnout.

De-centralized and standardized training will be our path to success as we set out to accomplish three key objectives in Q2:

* Onboarding excellent field staff
* Developing the skills of existing staff
* Advancing the skills of Core Team Members and Neighborhood Team Leaders

GOALS

|  |  |
| --- | --- |
| Training Program Goals by Type | |
| Recruitment Trainings | * 4 Field Organizer Academies with 340 total attendees * 160 Persuasion and Messaging Trainings with 2500 total attendees * 110 Voter Education trainings for volunteers with 1650 total attendees * 2 Jewish Americans for Obama Volunteer Trainings with 75 total attendees * 4 African Americans for Obama Volunteer Trainings with 120 total attendees |
| Introductory Trainings | * One DFD onboarding with 5 attendees * 3 FO onboardings with 53 total attendees * 2 RFD onboardings with 19 total attendees * 5 Summer Fellowship Kickoff trainings with 500 total attendees * 40 Summer Fellowship Regional Orientations with 500 total attendees |
| Development Trainings | * 3 Adobe Connect Trainings for Border States Volunteers with a total of 150 attendees * 3 May field staff webinars with 288 total attendees * 4 June field staff webinars with 544 total attendees * One June FO development training with 56 attendees * 5 Neighborhood Team Conference Train-the-Trainer Workshops with 36 total attendees * 40 regional Summer Fellows skill-building trainings with 375 total attendees * 2 statewide Summer Fellows data webinars with 400 total attendees * 2 statewide Summer Fellows Digital webinars with 400 total attendees * 1 statewide Summer Fellows skill-building webinars with 200 attendees * 2 Spanish Language Surrogate Development Trainings with 50 attendees * 8 FO turf type webinars with 310 total attendees |
| Advanced Trainings | * One April DFD planning retreat with 9 attendees * One June Staff Retreat with 207 attendees * 3 Neighborhood Teams Conferences with 1000 total attendees |

PROGRAMS

**STAFF TRAINING**

OFA-Florida will bring on 29% of its total November staff in Q2, with a great deal of that staff being added to the Field Team. The Q2 training plan will focus on two objectives: first, to set up all new staff for success through quality onboarding training, and secondly, to develop the skills of all staff, both new and existing, in order to meet the challenges that lie ahead in Q2 and beyond. Because our Q2 staff is the foundation upon which massive growth will occur in Q3 and Q4, the importance of getting staff training right in Q2 cannot be emphasized enough.

**Goals**

* Staff Introductory Training:
  + 3 Introductory Trainings for 53 new Field Organizers
  + 1 Introductory Training for 1 new Field Assistant
  + 2 Introductory Trainings for 19 new RFDs
  + 5 new DFDs onboarded on a rolling basis
* Staff Development Training:
  + One staff retreat with development training for 116 Field Organizers and 40 RFDs
* Staff Advanced Training:
  + One Field Leadership planning retreat for 9 DFDs
* Staff Recruitment Training:
  + 3 FO Academies with a combined total of 340 attendees (see Staff Recruitment section for details)

**DFD Onboarding**

The Field Leadership team will fill out in April with five additional DFDs (see Staffing section for details). The Training Director will welcome all incoming DFDs, schedule meetings for them with department heads, and orient them to the routine and structure of our team. In late April, when all Deputy Field Directors have arrived, the entire Field Leadership team will hold a one-day retreat to build community, do long term planning, and do an assessment of the first three weeks of the Q2 Field program.

**Headquarters Field Assistant Onboarding**

One Field Assistant will join the Field team at Tampa HQ in April. The training director will lead the Field Assistant onboarding process with contributions from all members of Tampa HQ. Once initial onboarding is complete, the Voter Registration Director will take over all Field Assistant training and management.

**RFD Onboarding**

We will onboard two waves of RFDs in Q2; nine in April and nine in May. Each wave will attend a 2-day training in Tampa, will shadow an excellent peer for one week, and then start in their turf. See Peer Trainers section for more details on how the shadow period will work.

**FO Onboarding**

By the start of Q2, we will have onboarded 62 Field Organizers in one large wave, and will have already created and tested a number of the processes involved in training new FOs. Statewide introductory FO trainings will be held once a month in April and May when our growth is modest. These will be two-day trainings in Tampa, led by the Training Director with RFDs front and center as trainers. These trainings will be for brand new FOs only. In June, we will hold a 3-day long training which will consist of June hires on Days 1 and 2, and April, May and June hires on day 3. This will allow these Field Organizers to experience an exciting large scale training similar to that experienced by the March wave of Field Organizers.

Each major onboarding should serve as the first day on staff for these Field Organizers, and will be followed by a two-week training period led by the RFD with help of an FO peer trainer (more on peer trainers below).

**Peer Trainers for Onboarding**

OFA-FL will utilize Peer Trainers to onboard both RFDs and FOs in Q2. This was a major component of the RFD onboarding of Q1, with some success. The Peer Trainers program was successful in taking the majority of day-to-day training off the plates of field leadership, helping new and existing RFDs build relationships with one another, and creating a space for cross pollination of ideas and best practices. The main challenge we saw in the program came down to a lack of thoroughness in the training provided to new staff by their peer trainers. In order to prevent this occurrence from happening again, Field Leadership must do the following:

* Select only RFDs or FOs who are exceeding their goals to serve as peer trainers.
* Select RFD and FO peer trainers well in advance of the shadow period and take time to better prepare them in advance
* Adjust the goals of RFD and FO peer trainers for the week of the shadow period to make space for the added workload of training a new staffer
* Cover more material centrally at the initial orientation that had previously been left to the shadow period, including but not limited to Voter Registration. This is one reason for the move to a 2-day orientation in Tampa for new RFDs.
* Create a shadow period checklist that is less ambitious and builds in time for new staff to work independently, freeing up the Peer Trainer to catch up on their own work
  + One way we’ll do this is by also scheduling daily webinars during the shadow period, each led by one of the peer trainers, for all field staff currently in a shadow phase. For example, during the April FO shadow period, 13 FOs will be out shadowing approximately 7 peer trainers. At a recurring standing time on each day of that shadow period, a different FO will lead a different skills webinar, and all 13 new FOs from across the state will hop on. For all peer trainers who are not leading the webinar, this is a great opportunity to catch up on day-to-day work while trainees are occupied.
  + In addition to daily webinars, the program should be structured in a way that gives trainees something to work on independently starting on the first day of the program (in addition to webinars), such as call time and completing turf research.

**RFD and FO Development Training**

RFD and FO development training needs fall into three main buckets:

* Managing and Training Others
* Basics in New Programmatic Elements
  + Canvassing
  + Persuasion and Messaging
  + Voter Contact/Motivation Messaging
* Basics needed as we transition to a larger organization
  + Supporter Housing hard ask
  + Office search tips and tricks
  + Being scrappy and getting resources
  + Recruiting and managing OOS volunteers

**Managing and Training Others:** The majority of this training will be intended for FOs, although RFDs can also benefit from it.

**Management:** The theme for the month of May will be Management Training, and the primary audience will be Field Organizers, although RFDs will benefit from additional management training. Management training program components will include the following:

**First Week of May:** A management skills assessment will go out to all DFDs, RFDs and FOs to complete in early May in four different ways:

1. FOs will evaluate their own management skills
2. RFDs will evaluate their FOs’ management skills
3. RFDs will evaluate their own management skills
4. DFDs will evaluate their RFDs’ management skills

**Each Week in May:** Florida’s Training department will host weekly webinars related to management training, focusing on particular skills taught by the Management Center, as well as the process of assigning out goals and tracking progress to goal. Each webinar will contain polls, interactive breakouts, and large group debriefs.

**Bi-weekly in May:** RFDs will hold 1:1 meetings with Field Organizers to discuss management strengths and struggles, identify and address FOs’ anxieties about managing Fellows, share tips and best practices from their own management experience, do case study exercises together with the FO, and discuss strategies for earning credibility in difficult management situations. The Florida Training Department will provide materials and guidance for these 1:1 advanced trainings.

**Last Week of May:** Management skills assessment will go out again to all DFDs, RFDs and FOs to complete and assess how May’s trainings have helped prepare them for managing interns.

**Train the Trainer:** The theme for June will be Training, with a primary focus on training FOs to be excellent trainers, although RFDs will also benefit from additional training for trainers. The Training will offer two modules via webinar, and will also offer one module during a statewide staff retreat in June.

**Adult Learning Theory: A Primer (Webinar):** This module will discuss the different elements that make or break trainings and give background regarding why adults learn best the way they do. This will serve as the foundation for the two modules to follow.

**Creating Excellent Training Materials (Webinar):** This module will be part theory, part hands-on workshop. First, it will cover the key adult learning principles to keep in mind when creating written materials, with an emphasis on catering to diverse learning styles and remembering the approaches to training that help adults learn more. Secondly, it will explore specific tools and techniques field staff can use in creating training materials, from aesthetics to content, in Word and in Powerpoint.

**Training Delivery Workshops (One per DFD region):** This interactive session will be rooted in adult learning theory, but will focus on showing trainers specific exercises they can do to improve their training delivery. The Training Director will train the DFDs to lead these sessions in their regions in the week prior to the Summer Fellowship Kickoff Training. Each workshop will include an interactive portion where trainers practice and receive feedback on the delivery of their presentations for the Summer Fellowship kickoff trainings.

**May All Staff Training:** The All Staff Training will be held May 21-22 in Tampa, and will include all staff from all departments of the campaign. The goals of the staff training are to build community among all OFA-FL staff, build management skills of field staff, and do long term planning for the summer. New FOs who will be hired in May will come to Tampa one day early and will stay one day late for their onboarding training.

**Timeline**

**April RFD Onboarding Training:**

Orientation: April 23-24

Shadow Period: April 25-May 3

RFDs in Turf: May 4

RFDs have goals effective May 4

**April FO Introductory Training:**

Orientation: April 16-17

In Turf April 18

Shadow period: April 11-16

FOs have goals effective April 13 (while still in shadow period)

**April DFD Onboarding:**

Rolling onboarding in April

Field Leadership Retreat: April 28

All management transitions complete by May 6

**May RFD Introductory Training:**

Orientation: May 7-8

Shadow Period: May 9-14

RFDs in Turf: May 15

RFDs have goals effective May 18

**May Field Staff Development Trainings:**

Rolling weekly webinars on Management starting the week of May 11

**May FO Introductory Training:**

Orientation: May 20-23

In Turf May 24

Shadow Period: May 24-31

FOs have goals effective May 25 (while still in shadow period)

**May All Staff Training:**

New FOs, May 20-23

All other staff: May 21-22

**June FO Introductory/Development Training:**

Orientation for Day One FOs: June 4-5

Training for all April, May and June FOs: June 6

In Turf June 7

Shadow Period: June 7-11

FOs have goals effective June 8 (while still in shadow period)

**June Field Staff Development Trainings:**

Rolling weekly Train-the-Trainer webinars starting the week of June 8

DFD Region-level Train-the-Trainer sessions June 11-14 (in preparation for Summer Fellowship kickoff trainings)

**STAFF RECRUITMENT: FIELD ORGANIZER ACADEMIES**

**Overview**

In order to register, persuade and turn out the voters needed to get to 52% in November, Florida’s Field Organizer army must be comprised of talented, well-trained Floridians who match the diversity of the communities we organize. Traditionally, Democratic campaigns in Florida have struggled to recruit local candidates well suited to organize in African-American, Hispanic, Caribbean and rural communities. In order to meet this challenge, Florida will hold 3 inaugural Field Organizer Academies in May.

The timing couldn’t possibly be better. We will have all 40 RFDs on the ground and will be staring a massive FO hiring wave in the face. The Spring Fellowship ends in late April and the Summer Fellowship starts on June 16, eliminating the discomfort and perceived inequity that comes from one person (a Fellow) committing to a 12-week program in order to get a job while another person (FO Academy Trainee) commits just two weeks to achieve the same end. RFDs will have the month of May to assemble a deep pool of excellent candidates and prepare to onboard these candidates throughout the summer.

All three FO Academies will combine for 340 attendees, with 245 of them from diverse communities. After the two-week testing process, we will identify 114 hire-worthy candidates for Field Organizer positions, with 85 of them from diverse communities.

**Overall goals**

|  |  |
| --- | --- |
| # of applicants: | 500 |
| # of attendees: | 340 |
| # of diverse applicants in attendance: | 245 |
| Length of testing period: | 2 weeks |
| Goal # of calls made per attendee at end of two week period | 350 |
| Goal # of voters registered per attendee at end of two week period | 18 |
| Goal # of doors knocked per attendee at end of two week period | 108 |
| Goal # of hirable candidates produced at end of two week period | 114 |

**Roles and Responsibilities**

**Lead RFDs:** Although virtually all RFDs will have a role to play in the FO Academies across the state, Lead RFDs will take ownership over the Field Department’s recruitment goals as well as oversee the testing process in their region. The Field Team will be responsible for 50% of offline applicant recruitment.

**Political Lead:** The Political Lead for each FO academy will notify all relevant Party leaders, elected officials and their staff of that region’s FO Academy, and will ask that these leaders encourage their networks to apply to attend. The Political Lead will also solicit and follow up with these leaders’ recommended applicants. The Political Lead will be responsible for 25% of offline applicant recruitment.

**Operation Vote Lead:** The Operation Vote Lead for each FO academy will notify all relevant Operation Vote contacts of that region’s FO Academy, and will ask that these leaders encourage their networks to apply to attend. The Operation Vote Lead will also solicit and follow up with these leaders’ recommended applicants. The Operation Vote Lead will be responsible for 25% of offline applicant recruitment.

**Training Lead:** The Training Leads for the different FO Academies will revise standard materials to make them as effective possible and will oversee the planning and execution of each training. Training Leads will work with relevant DFDs and RFDs to ensure all trainers participate in at least one practice session and walkthrough in advance of the training.

**Trainers:** Trainers will execute specific modules of the training session, and are selected on two criteria: 1. Some of them should be staff that will directly interact with (and potentially hire) trainees; 2. The makeup of our trainers should come as close as possible to matching the diversity of those who will be trained and tested.

**On-Site Informational Interviewers:** Each RFD will attend one of the FO academies and will conduct short 10-minute informational interviews with trainees at the end of the training. Interviewers will each set up at a table labeled with their region, and trainees will visit tables according to where they live or are interested in working. These do **not** count as hiring interviews (which should be approximately 30 minutes in length). This is an opportunity for trainees to get face time with a staff member and to establish when it is they will be coming to the office to complete testing.

**Digital Lead:** The Digital Lead will work with Chicago HQ to build the landing page and request build emails, will oversee the promotion of FO academies on social networks, will export and manage application responses, and will work with the Training Director to gather digital content from each training.

**Training Details**

**Initial Training Details by Location:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Location** | **(Panama City/Tallahassee)** | **Orlando** | **Daytona Beach** | **Miami/Broward** |
| **Operation Vote Focus** | Rural/AA | AA/Hispanic | AA | Hispanic, AA, Caribbean |
| **Attendance Goal** | 40 | 75 | 50 | 175 |
| **Date** | May 19 | May 24 | May 19 | May 25 |

**Standard Agenda (can be tweaked by location under direction of Training Lead):**

1. **Registration:** 8:30am to 9:00am
2. **INTRO** (30 mins) 9:00am to 9:30am
3. Welcome
   1. 15 second introductions (name, city, one word to describe themselves, or POTUS, or something else we figure out)
   2. Norms and REI
   3. Goals of training
   4. Framework of this program—daylong training, post-training, etc.
4. **Broad framework of OFA** (40 mins) – 9:30am to 10:00am
   1. 270 campaign strategy
   2. Messaging: President's accomplishments
5. **Our Strategy: The Neighborhood Team Model** (30 mins) – 10:00am to 10:30
6. **Role of the Field Organizer** (45 mins) – 10:10am to 10:55am
   1. Q&A Panel with Current Field Organizers
7. ***ICE BREAKER*** *(5 mins)*
8. **Personal Story** (60 min) – 11:00pm to 12:00pm
   1. Personal Story & Our Message– 11:00 to 11:30
   2. Speed Dating Practice – 11:30 to 12:00
9. **12:00pm LUNCH** (30 min)
10. **Phonebank** (60 min) 12:30 to 1:30pm
    1. Phonebank Contest: Who can make the most dials?

o All state staff will circulate to answer questions and listen to their hard asks

1. **Expectations for the next two weeks** (30 min) – 1:30pm to 2:00pm
   1. Testing process and goals outline
   2. Review of training schedule
   3. Breakout: With your Regionals about next steps (all RFDs and FOs)

o Given contact info of Regionals or Field Organizer

o Sign up for their specific track

o Fill out Calendar with their initial next month’s availability

1. **Program Evaluation:** Participants fill out eval form which indicates their level of interest in the testing process, in a job, etc after attending the day’s program.

**Ongoing Trainings:** In addition to completing organizing hours with a Lead RFD, trainees should also complete four organizing skills webinars. Each webinar will be offered at two different times in order for all trainees to attend all four.

**Recruitment Strategy and Timeline**

Recruitment of applicants to the FO academy will start early and will be a collaborative endeavor between Field, Operation Vote and Political.

**Field Recruitment:** The Field Department (Lead RFDs) will be responsible for 50% of offline recruitment, and 50% of applicants recruited by Team Field will be members of the key Operation Vote groups listed for each training in the “Training Details” section (ie AA or Hispanic). Lead RFDs will guide Field Organizers through the recruitment process, focusing on campus recruitment and on delegating recruitment goals out to Neighborhood Team Leaders.

**Operation Vote Recruitment:** The Operation Vote Lead will be responsible for 25% of offline recruitment, both pushing the application out through Operation Vote contacts and soliciting specific recommendations (by name) from Operation Vote contacts. If an Operation Vote leader recommends a specific person, the Operation Vote Lead will follow up and invite that person to apply.

**Political Recruitment:** The Political Lead will be responsible for 25% of offline recruitment, both pushing the application out through Political contacts (party leaders, elected officials, and their staff) and soliciting specific recommendations (by name) from Political contacts. If a political leader recommends a specific person, the Political Lead will follow up and invite that person to apply.

**Timeline**

22 days out Application is posted online

21 days out Offline recruitment begins

17 days out HQ Email drops

16 days out Rolling application review begins

14 days out Rolling acceptances begin

12 days out 40% to goal on attendees scheduled

10 days out Online application deadline

8 days out 70% to goal on attendees scheduled

5 days out Application review is complete; final offers made

4 days out 100% to goal on attendees scheduled (guest list is final)

**Testing, Interviewing and Hiring**

For two weeks following the initial training, trainees will undergo a rigorous testing process in order to be considered for a Field Organizer position. The trainee will report directly to the RFD Lead for the region in which s/he attended FO Academy. The RFD will use this time to test and evaluate the skills, talents, and attitude of the trainee as it relates to the potential of filling an FO position. Each trainee must meet four requirements in order to be considered for a position (listed below). If the trainee does not meet these four requirements but shows potential, s/he is invited to apply for the Summer Fellows program and have more time to develop her/his skills. If the trainee does not meet these four requirements and does not show potential, s/he is invited to continue involvement with the campaign on a volunteer basis.

While the trainee will be working with the RFD on a day-to-day basis, the Training Director will track performance and progress and brief the relevant RFD, in order to limit the burden placed on RFDs. Additionally, if at the end of the two weeks following the initial training, the trainee has not met all requirements to be considered for an FO position, this will be communicated to the trainee via email from the Training Director. If the trainee does meet the requirements and is moved to the interview process, this will be communicated by the RFD.

**FO Academy: Requirements for Field Organizer Consideration**

*All four requirements must be met within two weeks of initial training*

|  |  |  |
| --- | --- | --- |
| **Requirement** | **Accountability** | **Tracking** |
| Must complete 30 hours of organizing (15 hours per week) | Academy participants will be given a ledger to keep track of their hours. RFD will need to sign off on their hours each time they come in. At end of two weeks, trainee will scan and submit organizing hours ledger to TD via email or fax. | RFD will report on Trainee’s hours each night via google form; TD will monitor reports and track overall hours in a master spreadsheet that encompasses progress on all four requirements. |
| Must hit specific metric goals\* | Trainee soft reports in a google form nightly; Data Team pulls daily hard numbers. | TD compiles reports from google form and Data team daily to monitor integrity and percentage to goal. |
| Must receive a minimum composite score on qualitative performance evaluation by RFD | RFD completes assessment in Google webform focused on trainee’s qualitative abilities (ie people skills) | TR compiles assessments and does data analysis |
| Must complete two organizing skills webinars | After each webinar ends, trainees will be prompted to complete a mandatory eval webform. Each webinar will have a unique random link, so no trainee will be able to access the webform unless they complete the webinar. | TD will oversee back end of Eval and track each trainee’s progress to completing all required trainings. |

**\*Metric Goals Breakdown:**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Total Hours | Data and Training Hours | Call Hours | Expected calls per hour | Canvass Hours | Expected knocks per hour | VR Hours | Expected forms per hour | **Call Attempts Goal** | **Knock Attempts Goal** | **VR Forms Goal** |
| 30 | 5 | 10 | 35 | 6 | 18 | 9 | 2 | **350** | **108** | **18** |

**SPRING ORGANIZING FELLOWSHIP**

**Overview**

The goals of the Obama Organizing Fellowship are to test and train future field organizers, add capacity to our field program, assist in the development of neighborhood teams, and help our field staff hone their management skills. In Q2, we will focus on both completing our Spring Fellowship Program and kicking off and running our Summer Fellowship Program. The plan outlined below illustrates how we will finish off the Spring program.

**Mid-Program Assessments**

In order to understand the development of our Fellows, ensure we are providing adequate training, and adjust our program as needed, we will do a round of assessments of two types. Spring Fellows will assess their own skills, and RFDs will assess Fellows’ skills. The Training Director will create and send out the assessments (webform) and will also analyze responses, summarize toplines, and propose changes to the overall training program.

March 26 Assessments Sent Out

April 1 Assessments Due Completed

April 2-4 Training Director reviews and analyzes assessments

April 5 Training Director completes written summary and proposal for training program adjustments

April 6-7 Training Director briefs Field Leadership on toplines, presents proposal for training program adjustments, and gathers feedback

Training Director meets with relevant department training leads (ie Digital and Data) to finalize training program adjustments

DFDs communicate changes down the chain through RFDs

April 9 Training program adjustments take effect

**Ongoing Training**

One challenge we have faced in the Spring Fellowship program is low attendance on weekly Data and Digital webinars. There are two root causes of this challenge: one is that we (both Field Leadership and RFDs) do not emphasize them or remind people about them enough, and the other is that Fellows do not see them as extremely beneficial or helpful to their organizing, and thus do not prioritize them. We’ll make some fundamental changes to address these root causes in our Summer Fellows program, but we have also implemented some immediate changes to improve our webinar schedule, starting April 12.

**Fellows Webinar Schedule Changes**

|  |  |
| --- | --- |
| **Prior to April 12** | **Starting April 12** |
| Combined Data/Digital Webinars open to both Fellows and Volunteers   * 3 times per week   + Mondays at 8:00 PM   + Tuesdays at 3:00 PM   + Wednesdays at 12:00 Noon * Topics Vary by week (repeats the same material 3 times to accommodate more schedules) | Once a week Data Office Hours open to both Fellows and Volunteers   * Fridays at 11:00 AM   Once a week Digital webinars open to both Fellows and Volunteers   * Thursdays at 11:00 AM |

**Close of Program**

**End of Program Evaluations:** At the end of the program, we will conduct a thorough evaluation of the program from multiple perspectives, both to inform our plans for future programs and to assess which program participants we should consider for Field Organizer Positions.

**Spring Fellows Evaluations:** These will include four components: a skills self-assessment identical to the mid-program assessment completed in April, an evaluation of the program itself, an evaluation of their manager, and a survey about interest in future jobs (namely an indication of interest and earliest start date).

**RFD Evaluations of Spring Fellows:** These will include three components: a skills assessment identical to the mid-program assessment completed in April, a qualitative assessment of the Fellows’ behaviors (attitude, emotional IQ, team player or not, etc), and an indication of how interested they are in considering this Fellow for hire, and on what timeline. The RFD should complete the first two components utilizing information gathered from the FO directly managing the Fellow (if applicable).

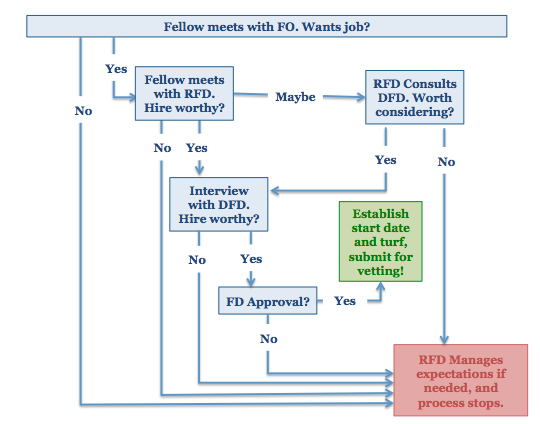
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**Closeout Checklist:** Each Fellow completing the program will receive a checklist for completing any outstanding items, including data entry, return of materials, and a transfer of any information acquired during the program which may continue to be useful to the Field Organizer, such as venues utilized as Staging Locations, office prospects, or interpersonal dynamics among volunteers which the FO should know about. The deadline for completion of checklist items is prior to the Fellow’s Program Debrief Meeting.

**Program Debrief Meetings:** All Fellows completing the program will attend a 1:1 debrief meeting with their Field Organizer to confirm completion of the closeout checklist, discuss the pluses and deltas of the program, the Fellow’s strengths and areas of improvement, and the Fellow’s interest in Field Organizer positions. If the Fellow is not interested in a Field Organizer position but is interested in continuing their involvement in some way, this meeting should also cover next steps for action. Any Fellow expressing interest in an FO position, no matter their performance, should attend a 1:1 meeting with the RFD.

**Meetings with RFDs:** Once a fellow has expressed interest in an FO position, regardless of performance, s/he will meet with the RFD. There are two main reasons for this: the first is that all those interested in positions should see that the process is fair and based on performance in order to minimize the dramatic behavior that will come up when people find out they will not be hired; the second reason is simple: this can serve as an initial interview for any hire-worthy candidates. It will be important for RFDs to manage expectations around hiring, which is a needle that must be threaded on a case by case basis. For strong FO candidates, the RFD should also use this meeting to discuss timeline and the candidate’s ability and willingness to re-locate, in order to start thinking about slots that may be most suitable for them.

**Post-Program Hiring:** Once an RFD speaks to a Fellow and deems her/him hireworthy, s/he moves into the general FO candidate pool and an interview with the relevant Deputy Field Director.

**Post Fellowship Program Hiring Process  
**

**Additional testing for potential Field Organizers:** We anticipate there may be Spring Fellows who complete the program, but who we can’t onboard immediately, either because we don’t have positions for them yet, or because we need to continue to evaluate whether they would be a good fit for the job. In order to keep the former group engaged and to provide additional opportunities to test the latter group, Spring Fellows will be asked to play key roles in the recruitment and training of Summer Fellows by taking on the following responsibilities:

* + Recruiting Potential Summer Fellows
  + Interviewing Potential Summer Fellows
  + Locking Down Summer Fellowship Kickoff Training Locations
  + Assisting with Summer Fellowship Kickoff Trainings as time keepers, breakout facilitators, or similar roles

**Program Closing Celebrations:** Tampa HQ will host a statewide Adobe Call to celebrate the work of the Fellows and unofficially close the program. RFDs will have full autonomy over what the program closing celebration looks like in their region.

**Program Closing Timeline**

April 11 End of program evaluations sent out

Closeout checklist sent out

April 17 End of program evaluations due complete

April 18-20 Program Debrief Meetings (Fellow and FO)

April 21 Statewide Adobe Call (unofficial last day of program)

RFD-led program closing celebrations

April 21-25 RFD meetings with any Fellows interested in FO jobs

April 26-30 DFD Interviews with FO candidates

**SUMMER ORGANIZING FELLOWSHIP**

**Overview**

The greatest challenge we will face is the sheer size and scope of our program. Our goal is to onboard 500 Summer Fellows; meaning each of our 116 Field Organizers on the ground in June, many of whom will be brand new, and many of whom will have recently been Fellows themselves, will manage an average of four Fellows. Our primary challenge will be training and preparing our Field Organizers to be excellent managers who meet goals, run turf-specific programs that also follow the statewide strategy. We will need to establish and maintain a tight communication structure, chain of command, and a culture of increased urgency and hyper-organization in order to keep up. The Summer Organizing Fellowship outlined below will meet these two challenges and achieve the four main goals outlined above as part of the Spring Fellowship Program.

The Florida Summer Organizing Fellowship program will kick off with five trainings (one per DFD region) on June 16, 2012 and will run through August 31, 2012. Summer Organizers will give either 15+ or 40+ hours per week. With the summer program comes a dramatic shift to an era of increased responsibility, rigorous expectations and more accountability than ever before. Summer Fellows will focus approximately 60% of their efforts on building and developing Neighborhood Teams through 1:1s, House Meetings, Trainings and other events. They will focus 40% of their efforts on pure production: doing voter registration, doing call time, and meeting daily personal goals for productivity (in addition to goals for what the teams in their area accomplish).

Our goal is for 500 Fellows to start the program, 400 Fellows to complete the program, and 140 hire-worthy FO candidates to come out of it.

**Program Goals**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Applicants Recruited** | **Applicants Accepted** | **Summer Fellows Starting the Program** | **Summer Fellows Completing the Program** | **Hire-worthy Summer Fellows Considered for FO Positions** |
| **Statewide Goal** | **850** | **610** | **500** | **400** | **140** |
| **Regional Goal: RFDs with pre-May Start Dates** | **25** | **18** | **15** | **12** | **4** |
| **Regional Goal: RFDs starting in May** | **10** | **7** | **5** | **4** | **2** |

**Recruitment**

All Field Staff will do heavy recruitment, particularly on the most heavily populated campuses in each region. Tactics will include tabling on campuses, speaking at College Democrat and Young Democrat meetings to promote the program, and empowering student volunteers and Fellowship alumni to own recruitment goals measured by the number of applications their work yields. Each Regional Field Director will work with their Field Organizers to complete a brief Campus Recruitment Plan which outlines these efforts.

Earnest recruitment will begin in April. Recruitment will spike in May and continue all the way until the application deadline on June 2.

Digital, Political and Operation Vote will all participate in recruiting for the program. Recruitment tactics for these three departments are listed below:

|  |  |  |
| --- | --- | --- |
| **Digital** | **Political** | **Operation Vote** |
| * National Email Push   + May 2   + May 29 * Social networks push * Text message send   + May 31 | * Blast application out to Party leaders, elected officials and their staff by May 16 * Solicit recommendations for fellows applicants from political contacts | * Blast application out to OV Leaders by May 16 * Solicit recommendations for fellows applicants from OV leaders * Speak to OV groups to promote the Fellowship program in person |

**Interviews, Offers and Acceptances**Interviews will begin in mid-April and will run all the way up to June 11 when the final acceptances will be made and the program will be closed to additional participants. Interviews will be conducted by a combination of Regional Field Directors and Field Organizers. In all regions, RFDs should model an excellent interview and acceptance process to allow FOs to learn excellent habits. The first five interviews in every region will be held by RFDs with FOs shadowing, and all RFDs should set aside time to train and debrief with FOs about Fellows interviews. After the first five interviews, each region will be different, based on the experience and skill level of the FOs in the region.

Interviews will be scheduled via email using SlyReply.com. This tool allows each interviewer to set up a series of time slots for which Summer Fellows Candidates can sign up online. The initial SlyReply should be created and sent out to all interview-worthy candidates by April 27. Each interviewer will send a SlyReply link out weekly to newly-identified interview-worthy candidates, as specified in the timeline below.

Each Region will conduct five rounds of interviews and will extend offers to top candidates each Saturday from May 4 through June 8. The Florida application deadline is June 2, final offers must be made by June 8 and all acceptances must be finalized by June 11, which is just 5 days before the kick-off trainings on June 16.

**Trainings**

**Kickoff Trainings:** We will hold five kickoff trainings for the Summer Fellows Program on June 16th; one per DFD region. This will be a day-long training with Regional Field Directors and Field Organizers as lead trainers. Additionally, each Region will hold a short, 3-hour orientation on June 19th to kick off the program in the region. This orientation will be the opportunity to answer questions, get into detail on the turf each Fellow will cover and the schedule each Fellow will maintain, as well as a chance for hands-on training in phone banking. Each regional orientation will be overseen by the RFD, but FOs will be front and center as trainers.

**Mid-Program Trainings:** At the midpoint of the program, Fellows will get together again in each DFD region for day-long mid-program trainings. This will be an opportunity to dig deep into specific areas of organizing, such as data and advanced leadership development. The content of these trainings will be determined collaboratively by DFDs and RFDs. For each training, DFDs should gather feedback and create a consensus for items that should be covered at the training. From there, the entire planning and execution process, including creation of the agenda, Powerpoint and other materials, should be delegated out to RFDs and FOs and overseen by DFDs, with frequent check-ins and draft approvals along the way.

**Fellows Training Checklists:** At the outset of the program, Summer Fellows will be given a sheet with a list of all the trainings s/he should complete by the end of the program. Some trainings will be standard trainings given to volunteers in person, such as Voter Registration or 1:1 trainings. Other trainings will be modules tailored specifically for Fellows, which will be offered every other week in every region. Other trainings will be focused on Data, Digital, or other organizing skills which will be offered in webinar form three times per week. Each Fellow will be responsible for completing trainings on all the skills or modules listed on their checklist by the end of the program, and meet certain bench marks along the way. This will boost attendance on Data, Digital, and other organizing skills webinars.

**Fellows Training Modules:** These will be provided to RFDs at the start of the program to aid in the training and development of the Fellows in their region. At least every other week, each Fellow should have the opportunity to participate in an in-person, formal training hosted either by an FO or an RFD. These trainings should focus on advancing Fellows’ skills and

**Fellows Training Webinars:** The following webinars will be offered to Fellows on an ongoing basis:

* Digital: Tuesdays at 2:00 PM (Weekly)
* Rotating Organizing Skills: Wednesdays at 2:00 PM (Bi-weekly)
  + It is the Training Director’s goal to not be the presenter on these calls, but to be the moderator as RFDs, Department Heads or outside trainers lead sessions.
  + Examples include:
    - Insider Baseball from Analyst Institute (Regina Schwartz)
    - The perfect phone call (RFD)
    - The Hard Ask (RFD)
    - Escalation 1:1s (RFD)
    - Maintenance 1:1s (RFD)
    - Event Planning (RFD)
    - Campus Organizing (YC Director)
    - Faith Organizing (AA Vote Director)
* Data: Thursdays at 2:00 PM (Weekly)

**Management Structure**

All Fellows will be managed by Field Organizers, except in rare situations. There may be cases when the Fellow is managed by an RFD at the start of the program, and then transitioned into an FO’s domain, based on the conditions outlined below:

* If the Field Organizer starts her/his job before the Fellowship begins, the Field Organizer will manage all Fellows in her/his turf.
* If the Field Organizer starts her/his job during the first half of the Fellowship program, s/he will start off not managing Fellows, but will transition into a management role through a four week process:
  + Weeks 1 and 2-Shadow Period: The RFD will manage all Fellows, and the FO will shadow and observe the RFD’s management practices, with frequent debriefs built in along the way. The RFD will take time during these weeks to show the FO all the tasks s/he will need to complete as a manager of Fellows, such as running conference calls, sending email updates, assigning out goals and tracking and communicating progress to goal.
  + Week 3-Training Wheels: The FO will transition into a management role with frequent supervision and support from the RFDs. The FO will take time during this week to demonstrate her/his understanding of all the tasks needed from the FO as a manager of Fellows (such as those described above).
  + Week 4-Full Management responsibilities: The FO will become the sole manager of Fellows in her/his region.
* If the Field Organizer starts her/his job during the second half of the Fellowship program, s/he will not manage Fellows until the Fall program, but will:
  + Shadow and learn from the RFD or the FOs who manage Fellows in her/his region
  + Focus on recruiting candidates for the Fall Fellowship Program

**Program Standardization**

In order to keep the quality of our program high, even with the low level of management experience our Field Organizers have, we will standardize a number of management practices across the state. The following elements will be present in every FO turf in every region, and each week, each Field Organizer will submit a workplan to her/his RFD which outlines all of these details for each Fellow for the week to come:

**Set hours:** FOs will set pre-determined weekly schedules for Summer Fellows which meet or exceed the minimum hour requirements for her/his track. For full time or part time Fellows with predictable work schedules that do not change from week to week, the Fellowship schedule established will apply to the duration of the program or until changes are needed, as determined by the Field Organizer with approval from the RFD. This will provide a level of reliability and stability previously lacking in some regions. For part time Fellows with rotating work hours each week, the FO must meet or call that Fellow once per week at a standing designated time to establish the schedule for the next coming week. If the Fellow has a predictable work schedule, s/he will also have a predictable, recurring weekly schedule as a Fellow; no exceptions.

**Policy on Fellows working remotely:** It is understood that many of the Fellows’ hours will be spent in 1:1 meetings, at satellite phone banks, at house meetings, at off-site events, or completing voter registration or canvass shifts. This is a natural part of organizing and will be encouraged. However, Field Organizers should not encourage or institutionalize the practice of Fellows working remotely when not completing these tasks. Only hours spent either in a field office or completing one of the tasks outlined above will count toward Fellows’ weekly hourly commitment, unless specifically approved by the Regional Field Director and Deputy Field Director overseeing the region. In other words, hours spent by Fellows working from home do not count. For accountability, productivity and maximum learning, face time between Fellows and their managing FOs will be extremely important.

**Turf:** Each Summer Fellow must be assigned to a specific geographic region ranging from 1-2 neighborhood team turfs. Ownership over one’s turf is one of key traits of a Field Organizer job, and the fellowship should mimic this component.

**Goals:** Field Organizers will assign all Summer Fellows both weekly goals and daily goals (on days Fellows are active). Summer Fellows will be held accountable to both *overall* and *personal* goals. Overall goals refer to goals which must be met in the turf through a combination of the work each Fellow does personally and the work done by volunteers in the Fellow’s turf; personal goals refer to goals which must be met solely through work put in directly by the Fellow. In other words, a Fellow’s personal phone attempts goal refers to the minimum number of calls that Fellow must personally make, and is part of the overall goal to which that Fellow is held accountable.

FOs will be responsible for setting Fellows’ overall goals with guidance from the RFD, but every Fellow must be held accountable to standard baseline personal goals (below).

**Sacred Personal Call Time:** All full time fellows will spend a minimum of three hours per day, five days per week, doing personal call time. Part time fellows’ call time hours need not be daily, but should be set by the FO based on the Fellow’s schedule and goals.

**Sacred Personal Voter Registration Time:** In order to boost our voter registration capacity and allow ample opportunity for Summer Fellows to enhance and perfect their voter registration skills, all full time Summer Fellows will spend a minimum number of hours per day personally registering voters, five days per week. Minimum hours vary depending on turf type; please see the table below. Part time Fellows’ personal voter registration hours need not be daily, but should be set by the FO based on the Fellow’s schedule and goals.

**Personal Goals and Expectations: Full Time Summer Fellows\***

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Turf Type** | **Weekly Voter Reg Forms Goal** | **Daily Voter Reg Forms Goal** | **Daily Minimum Voter Reg Hours** | **Weekly Phone Attempts Goal** | **Daily Phone Attempts Goal** | **Daily Minimum Call Time Hours** |
| **Persuasion** | 25 | 5 | 2 | 500 | 100 | 4 |
| **Registration/Turnout** | 50 | 10 | 4 | 375 | 75 | 3 |

**Personal Goals and Expectations: Part Time Summer Fellows\***

|  |  |  |
| --- | --- | --- |
| **Turf Type** | **Weekly Voter Reg Forms Goal** | **Weekly Phone Attempts Goal** |
| **Persuasion** | 15 | 125 |
| **Registration/Turnout** | 25 | 150 |

*\*These numbers are a standard minimum. Each FO may increase these numbers with consultation and approval from the RFD.*

**Communication:** Field Organizers will hold twice weekly meetings/conference calls with Summer Fellows. Full Time Fellows will be required on all calls, and part time fellows will be required as long as their schedule permits. These calls will be every Tuesday and Thursday from 12:00-1:00 PM. Thursday calls will focus on goals priorities and programs for the week ahead, while Tuesday calls will focus on progress to goal, celebrating Fellows who are performing well, debriefing on the week so far, and setting plans to ensure the final 2.5 days in the reporting week result in 100% to all core goals on the week.

**Training for FOs**

Most of our Field Organizers will be managing interns for the first time. Moreover, many of our Field Organizers will be managing Fellows who are older than them, the same age as them, more experienced than them, or recently their peers. For this reason, we must train our FOs in two key areas: management and training. Please see the Staff Training Plan for details.

**Summer Fellowship Timeline**

April 13, 2012 Summer Fellowship Program Guide goes out to staff

Template Recruitment and Interview Plan goes out to staff

April 16, 2012 Each region identifies at least 3 target schools for campus recruitment

Each region identifies at least 3 Campus Recruitment Captains and establishes recruitment goals

Each region identifies at least 3 non-campus Recruitment Leads from among neighborhood teams

RFDs work with DFDs to finalize region-specific Summer Fellowship Acceptance goals

April 20, 2012 Each RFD reads through all applicants, marks as “Interview” or “Do Not Interview,” and assigns them to FOs in Quickbase.. (Each RFD will continue to assign applicants to FOs on a rolling basis as they come in to QB).

April 21, 2012 Each RFD submits final Regional Campus Recruitment and Interview Plan (with contributions from Field Organizers)

April 24, 2012 RFDs train FOs on interview process and communicate interview assignments

Campus Recruitment Plan Execution is in full swing

April 27, 2012 All Interviewers set up and send out Sly Reply links to interview-worthy candidates

May 2, 2012 Email 1 Drops: Application link to full list

April 30-May 4, 2012 Each RFD completes 1st round of interviews (with help from Interview Leads)

May 4, 2012 Each RFD makes offers to top applicants (20% to acceptance goal)

May 7-11, 2012 Recruitment Blitz

RFDs debrief with FOs on first round of interviews

Aggressive data entry audit and push

May 14-18, 2012 Each RFD completes 2nd round of interviews (with help from Interview Leads)

May 18, 2012 Each RFD makes offers to top applicants (50% to acceptance goal)

May 21-25, 2012 Each RFD completes 3rd round of interviews (with help from Interview Leads)

May 25, 2012 Each RFD makes offers to top applicants

May 28-Jun 1, 2012 Each RFD completes 4th round of interviews (with help from Interview Leads)

May 28, 2012 Email 2 drops: Last chance-apply by June 2!

May 30, 2012 Full list text message send: Last chance-apply by June 2!

June 1, 2012 Each Interviewed makes offers to top applicants

June 2, 2012 Florida Application Deadline

June 4-7, 2012 Each RFD Completes final round of interviews (with help from Interview Leads) (80% to acceptance goal)

June 8, 2012 Each RFD makes final offers to top applicants

June 11, 2012 All acceptances finalized and all offers made have been given closure (100% to acceptance goal)

June 16, 2012 Program kickoff trainings in each DFD region

June 19, 2012 Regional Orientations

Jul 30-Aug 8 , 2012 Regional Midpoint Trainings in Each Region

Aug 31, 2012 Finals begin at many universities; participation likely to drop but program should continue as long as Fellows remain active

**NEIGHBORHOOD TEAM DEVELOPMENT TRAINING**

The field plan outlines ambitious goals for the neighborhood team program, and we need a training program to match. The following plan outlines the core components of neighborhood team development training, focusing on growing our teams in numbers, enhancing the skills of our CTMs and NTLs, and standardizing and de-centralizing team development training.

**Regional Team Development Training Plans**

The Training Department’s role in Neighborhood Team Development Training will be to get materials into the hands of RFDs that will help them bring the organization in their region up a level in terms of training. To start this process, all RFDs will complete a team development training plan for their regions, with input from Field Organizers. The goals and programs contained in this plan will be adjusted according to regional needs.

April 30 Regional Team Development Plan Guidance and Template sent to RFDs

May 7 First draft Team Development Plans due to DFDs

May 11 DFDs send feedback to RFDs on plans (with input from Training Director)

May 16 Regional Team Development Training Plans finalized

**Ongoing NT Development Training for Each Rung on the Ladder of Engagement**

**Already confirmed NTLs and CTMs:** In order to turn our volunteer leadership into future GOTV leaders, we must provide rigorous training to help them all step up to the next level of sophistication in their work. Our GOTV operation will demand highly skilled, well-practiced leaders who work well under pressure and have experience troubleshooting at events. We need to hold our NTLs and CTMs to a higher standard of accountability and expectations, as well as train them in the skills they’ll need to handle these tasks. We will provide the following training for our existing leadership:

* Advanced Data Training for Data Core Team Members (at least one training opportunity per region per month)
* Advanced Management Training for Neighborhood Team Leaders (at least one training opportunity per region per month)
* Strategic Planning: Using events to grow teams and identify and test leaders
  + Canvass events (a new element in Q2)
  + Phone Banks
    - Volunteer recruitment phone banks
    - Persuasion phone banks (a new element of Q2; teams will need coaching to use these events to grow their teams; they will need to be structured a bit differently from vol recruitment phone banks
  + Voter Registration events
  + Combinations of the above for Days of Action
* Persuasion and Messaging Training for all NTLs and CTMs
  + Goal 1: Achieve mastery of material
  + Goal 2: Train NTLs and CTMs to train others

**NTLs and CTMs in testing:** In order to ensure all NTLs and CTMs possess a baseline standard set of skills, we must provide them with standardized training to set them up for success when testing. The general practice for RFDs in prior phases has been to ask potential leaders to host an event, and then training them to run that event in a one-off manner. One-on-one training is not inherently bad, but the material on which prospective leaders are trained need to be standardized, especially as we move the task of training and managing volunteer leaders out of RFDs’ domain and into FOs’ domain. The Training Department will provide the following standardized training manuals in order to aid in the training and testing process:

* Pre-test training guide and checklist: Planning and Executing an Excellent Phone Bank
* Pre-test training guide and checklist: Planning and Executing an Excellent Canvass
* Pre-test training guide and checklist: Planning and Executing an Excellent Voter Registration Event
* Pre-test training guide and checklist: Planning and Executing an Excellent Voter Registration Training
* Pre-test training guide and checklist: Coordinating a team of data entry volunteers during large events

**Identifying More NTL and CTM Prospects Through Recruitment Trainings**

**Persuasion and Messaging Trainings:** These trainings will be held locally, led by Field Organizers, as a tool for recruiting

**Persuasion Trainings:** Each Field Organizer will hold regularly recurring persuasion and messaging trainings followed by persuasion phone banks. These trainings will serve both to ease anxieties of existing phone bank volunteers and to recruit new phone bankers who enjoy persuasion calls. The more we can grow our pool of phone bankers, the more NTL and Phone Bank Captain prospects we can identify to move up the ladder of engagement.

**Voter Registration Trainings:** In addition to holding regular certification courses in their turf, FOs will also hold trainings that focus on tactics: how to find the best locations, how to behave and approach people, how to make an effective voter registration ask and, more importantly, how to cater your ask to the situation. These trainings will be no less than 50% role play, and will be strategically scheduled to be followed immediately by hands-on voter registration events.

**Operation Vote Trainings:** OFA-Florida will push at least one major Operation Vote training initiative per month in Q2 and beyond, including the following:

May: Jewish Americans for Obama Messaging Trainings

June: African Americans for Obama Volunteer Trainings

August: Women for Obama Volunteer Trainings

September: Greater Together Campus Kickoff Trainings

**Train-the-Trainer:** Empowering and training volunteers to train others can serve as both development for existing leaders and testing for prospective leaders. As the Florida Field program grows, de-centralizing training will be important, and it will take serious Train-the-Trainer investment throughout Q2.

**Neighborhood Team Conferences:** NTCs are outlined in depth below. As NTCs will take place toward the end of the phase, and we should spend Q2 working to train trainers and de-centralize our training programs, the NTC should serve as the culmination of that project, and no fewer than 75% of NTC workshops should be led by volunteer leaders.

**NEIGHBORHOOD TEAM CONFERENCES**

**Overview**

Florida’s 2011 Neighborhood Team Conference was a success in building community and energizing volunteers, but when it came to serving the purpose of strategically moving prospective leaders up the ladder of engagement, it didn’t quite hit the mark. The main point of improvement is that our workshops, while relevant and excellent, were chosen by attendees on the spot rather than in advance, and the RFDs weren’t able to guide their volunteer leaders to select workshops that would best serve them on their track to the next rung on the ladder.

Our June Neighborhood Team Conferences will be structured in a way that includes time as a large group, time for teams to do strategic planning together, time for NTLs to get advanced training, and time for prospective leaders to be trained in areas that are pertinent to their development into specific roles. Field Staff will determine in advance of the training which of the following buckets attendees fall into, and will guide their workshop selection accordingly:

* Existing NTL (needs advanced management training; needs to lead a team planning session; can serve as trainer)
* Existing CTM (needs advanced specialization training; needs to assist in a team planning session; can serve as trainer)
* Prospective NTL (needs introductory management training; needs sampling of introductory trainings in areas of specialization)
* Prospective CTM (needs team model training; needs multiple trainings in an area of specialization)
* Unknown/new volunteer (needs multiple trainings in team model; needs sampling of introductory trainings in any specialization areas of interest)

**Goals**

**Qualitative**

* Strategically move volunteers and prospects up the ladder of engagement
* Empower volunteer leaders to actively develop and train team members and prospective team members

**Quantitative**

* 1000 attendees total
* 36 volunteer leaders acting as workshop trainers
* 50 NTL or CTM prospects tested through co-facilitating a Neighborhood Team Planning Session
* 200 CTMs confirmed into specific roles within three weeks of the NTC
* 75% of NTC attendees participate in at least three team-based events within one month of the NTC
* NTLs hold 1:1s with all new prospects from their turf within three weeks of the NTC

**Locations**

* North Florida (City TBD)
* Central Florida (Orlando)
* South Florida (City TBD)

**Model Agenda:**

The format and agenda for our three Neighborhood Team Conferences will be modeled after the Fall 2011 statewide NTC in Tampa (while incorporating the changes outlined above). Sample below:

9:00 – 10:00 AM Registration and Breakfast

10:00 – 10:50 AM Full Session 1

Welcome and Introductions

Fall 2011: Our Plan and Our Goals

10:50 – 11:00 AM Break

11:00 AM – 1:00 PM Workshop Blocks A and B (10 min break in between)

1:00 – 2:00 PM Lunch

2:00 – 3:20 PM Full Session 2

Voter Registration in Florida

3:20 – 3:30 PM Break

3:30 – 5:30 PM Workshop Blocks C and D (10 min break in between)

5:30 – 6:30 PM Dinner

6:30 – 7:45 PM Full Session 3

Debrief on the Day’s Workshops

Regional Breakouts

Closing and Next Steps

**Neighborhood Team Conference Timeline**

May 11 16 Vol Trainer Prospects Identified

May 18 22 Vol Trainer Prospects Identified

May 25 36 Vol Trainer Prospects Identified

June 1 Locations locked; recruitment begins

June 3 40 Vol Trainer Prospects Identified

Data Audit and Cleanup Complete (Confirmed CTMs and NTLs)

June 4 Registration page loaded to BSD (separate from BO.com; unique link available only to invitees)

June 5 List of modules finalized and assigned out for content development

June 6 TD Holds Conference Call with all Content Development Leads

18 Vol Trainers Confirmed and assigned to modules (50% to goal)

Statewide Email invite to all Confirmed CTMs and NTLs; link to registration page

Framework agenda finalized

50% to recruitment goal

June 7 27 Vol Trainers Confirmed and assigned to modules (75% to goal)

June 10 Workshop matrices finalized

36 Vol Trainers Confirmed and assigned to modules (100% to goal)

All workshop content complete (PPTs, annotated agendas and handouts)

June 12 Training Director holds prep call with Volunteer Trainers

Training Director sends assigned content to each Volunteer Trainer

June 13-19 FOs meet with RFDs to agree on customized schedules for all attendees from each FO’s turf, based on training and development needs

FOs meet with volunteer trainers to review training materials and answer questions

June 13 75% to recruitment goal

June 18 100% to recruitment goal

June 18-20 RFDs oversee in-person training practices sessions in which all who will lead workshops (including FOs and NTLs) practice sessions and receive feedback

June 19 Tampa HQ sends out welcome packet with logistics, start times and end times

June 20 FO sends out customized agenda to each attendee from their turf

June 21 First round of confirmation calls

First round of confirmation emails

June 22 Second round of confirmation calls

Second round of confirmation emails

Final run-through and practice session

June 23 Neighborhood Team Conferences

June 26 NTC Data Entry Complete

June 27 NTC Follow-up Emails go out to NTLs from FOs

June 28 NTC Follow-up Emails go out to CTMs and prospects from NTLs

OVERALL PROGRAM TIMELINE

**April DFD Onboarding**

***Training Type:*** Staff Introductory (Capacity Building)

***Scope:*** Statewide

***Location:*** Tampa

***Audience:*** New Deputy Field Directors

***Attendance Goal:*** 5

***Trainer(s):*** Training Director, FD, Department Heads

***Date/Date Range:*** Rolling onboarding in April; all management transitions complete by May 6

**April FO Introductory Training**

***Training Type:*** Staff Introductory (Capacity Building)

***Scope:*** Regional

***Location:*** Varies by region

***Audience:*** Field Organizers starting in April

***Attendance Goal:*** 13

***Trainer(s):*** RFDs, DFDs, FD, SD, Department Heads

***Date/Date Range:*** Orientation: April 16-17; FOs in Turf: April 18; Shadow Period: April 18-23

**April FO Peer Shadow Program**

***Training Type:*** Staff Introductory (Capacity Building)

***Scope:*** Statewide

***Location:*** Tampa

***Audience:*** Field Organizers starting in April

***Attendance Goal:*** 13

***Trainer(s):*** RFDs, Experienced FOs

***Date/Date Range:*** April 18-23

**Weekly FO Turf Type Webinars**

***Training type:*** Staff Development (Capacity Building, Persuasion, Registration, Turnout)

***Scope:*** Statewide

***Location:*** Webinar

***Audience:*** Field Organizers

***Attendance Goal:*** 50% of all Field Organizers on each session

***Trainer(s):*** DFDs, RFDs

***Date/Date Range:*** Once a week starting Friday, April 20

**Volunteer Persuasion and Messaging Training**

***Training Type:*** Volunteer Recruitment (Capacity Building, Persuasion)

***Scope:*** Regional

***Location:*** Varies by Region and Turf

***Audience:*** New volunteers

***Attendance Goal:*** 15 attendees per training

***Trainer(s):*** FOs, RFDs

***Date/Date Range:*** Once every two weeks per region starting week of April 20

**Border State Adobe Connect Persuasion Trainings**

***Training Type:*** Volunteer Introductory/Recruitment (Capacity Building, Persuasion)

***Scope:*** Statewide + Border States

***Location:*** Webinar

***Audience:*** Border state volunteers scheduled for upcoming trips to FL; Border state volunteer prospects

***Attendance Goal:*** 150 total (average of 50 attendees per session)

***Trainer(s):*** Training Director

***Date/Date Range:*** Once per month in April, May and June

**April RFD Introductory Training**

***Training Type:***Staff Introductory (Capacity Training)

***Scope:*** Statewide

***Location:*** Tampa

***Audience:*** New Regional Field Directors

***Attendance Goal:*** 9

***Trainer(s):*** DFDs, FD, SD, Department Heads

***Date/Date Range:*** Orientation: April 23-24; Shadow period: April 25-May 3; RFDs in turf: May 4

**April RFD Peer Shadowing Program**

***Training Type:***Staff Introductory (Capacity Building)

***Scope:*** Regional

***Location:*** Varies by region

***Audience:*** New Regional Field Directors

***Attendance Goal:*** 9

***Trainer(s):*** Experienced RFDs

***Date/Date Range:*** April 25-May 3

**April DFD Planning Retreat**

***Training Type:*** Staff Advanced (Capacity Building)

***Scope:*** Statewide

***Location:*** Tampa

***Audience:*** New Deputy Field Directors

***Attendance Goal:*** 9

***Trainer(s):*** FD, with assistance from Training Director

***Date/Date Range:*** April 28

**Spanish Language Surrogate Development Trainings**

***Training Type:*** Volunteer Development (Capacity Building, Turnout)

***Scope:*** Select counties

***Location:*** Miami and Orlando

***Audience:*** Hispanic political surrogates, press volunteers, volunteer leaders

***Attendance Goal:*** 50 total

***Trainer(s):*** Communications Staff

***Date/Date Range:*** Late April

**May RFD Introductory Training**

***Training Type:*** Staff Introductory (Capacity Building)

***Scope:*** Statewide

***Location:*** Tampa

***Audience:*** New RFDs starting in May

***Attendance Goal:*** 10

***Trainer(s):*** DFDs, FD, SD, Department Heads

***Date/Date Range:*** Orientation: May 7-8; Shadow Period: May 9-14; RFDs in Turf: May 15

**May RFD Peer Shadowing Program**

***Training Type:***Staff Introductory (Capacity Building)

***Scope:*** Regional

***Location:*** Varies by region

***Audience:*** New RFDs starting in May

***Attendance Goal:*** 10

***Trainer(s):*** Experienced RFDs

***Date/Date Range:*** May 9-14

**May Field Staff Development Webinars (Management Focus)**

***Training Type:*** Staff Development (Capacity Building)

***Scope:*** Statewide

***Location:*** Webinar

***Audience:*** Mandatory for all FOs, Encouraged for all RFDs

***Attendance Goal:*** 96 (86 FOs and 10 RFDs)

***Trainer(s):*** Training Director

***Date/Date Range:*** Once per week starting the week of May 11

**Field Organizer Academies**

***Training Type:*** Staff Recruitment (Capacity Building, Persuasion, Registration, Turnout)

***Scope:*** Multi-county (North FL, Orange County, Volusia County, Miami-Dade/Broward County)

***Location:*** TBD

***Audience:*** Potential Field Organizers

***Attendance Goal:*** 340 (40 in N FL, 75 in Orlando, 50 in Daytona Beach, 175 in Miami/Broward)

***Trainer(s):*** RFDs, DFDs

***Date/Date Range:*** May 19, 24, 25

**Volunteer Voter Education Training**

***Training Type:*** Volunteer Recruitment (Capacity Building, Turnout)

***Scope:*** Regional

***Location:*** Varies by Region

***Audience:*** New volunteers

***Attendance Goal:*** 15 attendees

***Trainer(s):*** FOs, RFDs

***Date/Date Range:*** Once every two weeks per region starting week of May 18

**May All Staff Training**

***Training Type:*** Staff Advanced (Capacity Building, Registration, Persuasion, Turnout)

***Scope:*** Statewide

***Location:*** TBD

***Audience:*** All OFA-FL Staff

***Attendance Goal:*** 207

***Trainer(s):*** SD, Department Heads, FD, DFDs, RFDs

***Date/Date Range:*** May 21-22

**May FO Introductory Training**

***Training Type:*** Staff Introductory (Capacity Building)

***Scope:*** Statewide

***Location:*** Tampa

***Audience:*** All Field Organizers Starting in May

***Attendance Goal:*** 10

***Trainer(s):*** RFDs, DFDs, FD, SD, Department Heads

***Date/Date Range:*** Orientation: May 20-24; FOs in turf: May 25; Shadow period: May 25-31

**May FO Peer Shadowing Program**

***Training Type:*** Staff Introductory (Capacity Building)

***Scope:*** Regional

***Location:*** Varies by Region

***Audience:*** Field Organizers starting in May

***Attendance Goal:*** 10

***Trainer(s):*** RFDs, Experienced FOs

***Date/Date Range:*** May 25-31

**Jewish Americans for Obama Messaging Trainings**

***Training Type:*** Volunteer Recruitment (Capacity Building, Persuasion, Turnout)

***Scope:*** Select Regions

***Location:*** Palm Beach, Broward (TBD)

***Audience:*** NTLs, CTMs, Volunteers, Community Leaders

***Attendance Goal:*** 75 total

***Trainer(s):*** RFDs,

***Date/Date Range:*** TBD May

**June FO Introductory/Development Training**

***Training Type:*** Staff Introductory/Development (Capacity Building)

***Scope:*** Statewide

***Location:*** Tampa

***Audience:*** All FOs starting after March 19

***Attendance Goal:*** 56

***Trainer(s):*** RFDs, DFDs, FD, SD,

***Date/Date Range:*** Orientation for new FOs: June 4-5; Training for all April, May and June FOs: June 6; In turf: June 7; Shadow Period: June 7-11

**June FO Peer Shadowing Program**

***Training Type:*** Staff Introductory (Capacity Building)

***Scope:*** Regional

***Location:*** Varies by Region

***Audience:*** Field Organizers starting in June

***Attendance Goal:*** 30

***Trainer(s):*** RFDs, Experienced FOs

***Date/Date Range:*** June 7-11

**June Field Staff Development Webinars (Train-the-trainer Focus)**

***Training Type:*** Staff Development (Capacity Building)

***Scope:*** Statewide

***Location:*** Webinar

***Audience:*** Mandatory for all FOs, encouraged for all RFDs

***Attendance Goal:*** 136 (116 FOs, 20 RFDs)

***Trainer(s):*** Training Director

***Date/Date Range:*** Weekly webinars starting the first week of June

**Summer Fellowship Kickoff Trainings**

***Training Type:*** Fellows Introductory (Capacity Building)

***Scope:*** One per DFD region (5 total)

***Location:*** Varies by DFD region

***Audience:*** New Summer Fellows

***Attendance Goal:*** 500

***Trainer(s):*** Field Organizers, RFDs

***Date/Date Range:*** June 16, 2012

**African Americans for Obama Volunteer Trainings**

***Training Type:*** Volunteer Recruitment (Capacity Building, Registration, Turnout)

***Scope:*** Select Regions

***Location:*** Varies by Region

***Audience:*** Volunteer prospects, CTMs, NTLs

***Attendance Goal:*** 120 volunteers across 4 trainings

***Trainer(s):*** FOs, RFDs, Senior Staff

***Date/Date Range:*** June 15-30

**NTC Train-the-Trainer Workshops**

***Training Type:*** Volunteer Development (Capacity Building)

***Scope:*** One per DFD region

***Location:*** Varies by region

***Audience:*** NTLs and CTMs confirmed to act as trainers

***Attendance Goal:*** 36 total

***Trainer(s):*** Field Organizers and RFDs

***Date/Date Range:*** June 18-20, 2012

**Summer Fellowship Regional Orientations**

***Training Type:*** Fellows Introductory (Capacity Building)

***Scope:*** Regional

***Location:*** Varies by Region

***Audience:*** New Summer Fellows

***Attendance Goal:*** 500

***Trainer(s):*** Lead Summer Fellows, Field Organizers, RFDs

***Date/Date Range:*** June 19, 2012

**Regional Ongoing Fellows Trainings**

***Training Type:*** Fellows Development (Capacity Building, Persuasion, Registration, Turnout)

***Scope:*** Regional

***Location:*** Varies by Region

***Audience:*** Summer Fellows

***Attendance Goal:*** 75% of Fellows per region per training

***Trainer(s):*** FOs, RFDs

***Date/Date Range:*** 1 per region between June 19-30

**Ongoing Fellows Data Webinars**

***Training Type:*** Fellows Development (Capacity Building)

***Scope:*** Statewide

***Location:*** Webinar

***Audience:*** Summer Fellows

***Attendance Goal:*** 40% of Fellows per webinar

***Trainer(s):*** Data Staff, RFDs, FOs

***Date/Date Range:*** 1 per week starting week of June 19

**Ongoing Fellows Digital Webinars**

***Training Type:*** Fellows Development (Capacity Building)

***Scope:*** Statewide

***Location:*** Webinar

***Audience:*** Summer Fellows

***Attendance Goal:*** 40% of Fellows per webinar

***Trainer(s):*** Digital Staff, RFDs, FOs

***Date/Date Range:*** 1 per week starting week of June 19

**Neighborhood Team Conferences**

***Training Type:*** Volunteer Development/Advanced (Capacity Building, Persuasion, Registration, Turnout)

***Scope:*** North FL, Central FL, South FL

***Location:*** TBD

***Audience:*** NTLs, CTMs, NTL Prospects, CTM Prospects

***Attendance Goal:*** 1000

***Trainer(s):*** Select NTLs, CTMs, Field Organizers and Field Leadership

***Date/Date Range:*** June 23, 2012

**Ongoing Fellows Core Skills Webinars**

***Training Type:*** Fellows Development (Capacity Building, Persuasion, Registration, Turnout)

***Scope:*** Statewide

***Location:*** Webinar

***Audience:*** Summer Fellows

***Attendance Goal:*** 40% of Fellows per webinar

***Trainer(s):*** RFDs, DFDs, Training Director, outside guests

***Date/Date Range:*** One every two weeks starting week of June 26

**POST-Q2 TRAINING**

**Hispanics for Obama Volunteer Trainings**

***Training Type:*** Volunteer Recruitment (Capacity Building, Registration, Turnout)

***Scope:*** Select regions

***Location:*** TBD

***Audience:*** Volunteer prospects, NTLs, CTMs

***Attendance Goal:*** TBD

***Trainer(s):*** FOs, RFDs, DFDs, Senior Staff

***Date/Date Range:*** July TBD

**All Staff Training**

***Training Type:*** Staff Development (Capacity Building, Registration, Persuasion, Turnout)

***Scope:*** Statewide

***Location:*** TBD

***Audience:*** All OFA-FL Staff

***Attendance Goal:*** 255

***Trainer(s):*** Senior Staff

***Date/Date Range:*** Late July

**Summer Fellows Mid-Program Trainings**

***Training Type:*** Fellows Development (Capacity Building, Registration, Persuasion, Turnout)

***Scope:*** One per DFD region (5 total)

***Location:*** Varies by region

***Audience:*** Summer Fellows

***Attendance Goal:*** 425

***Trainer(s):*** FOs, RFDs

***Date/Date Range:*** July 30-August 8

**Women for Obama Volunteer Trainings**

***Training Type:*** Volunteer Recruitment (Capacity Building, Persuasion)

***Scope:*** Select regions

***Location:*** TBD

***Audience:*** Volunteer prospects, NTLs, CTMs

***Attendance Goal:*** TBD

***Trainer(s):*** FOs, RFDs, DFDs, Senior Staff

***Date/Date Range:*** August TBD

**All Staff (GOTV) Training**

***Training Type:*** Staff Development (Capacity Building, Persuasion, Registration, Turnout)

***Scope:*** Statewide

***Location:*** TBD

***Audience:*** All OFA-FL Staff

***Attendance Goal:*** 503

***Trainer(s):*** Senior Staff

***Date/Date Range:*** Late September

**Neighborhood Team Conferences**

***Training Type:*** Volunteer Development/Advanced (Capacity Building, Persuasion, Registration, Turnout)

***Scope:*** One in N FL, One in C FL, One in S FL

***Location:*** TBD

***Audience:*** NTLs, CTMs, NTLs and CTM prospects

***Attendance Goal:*** TBD

***Trainer(s):*** NTLs, FOs, RFDs, DFDs, Senior Staff, Outside Guests

***Date/Date Range:*** Late September

**FO Onboarding – July through September**

***Training Type:*** Staff Introductory (Capacity Building)

***Scope:*** Statewide

***Location:*** Tampa

***Audience:*** New Field Organizers

***Attendance Goal:*** 284 total

***Trainer(s):*** RFDs, DFDs, FD, SD, Department Heads

***Date/Date Range:*** Twice per month each month

**Greater Together Campus Kickoff Trainings**

***Training Type:*** Volunteer Recruitment (Capacity Building, Registration, Turnout)

***Scope:*** Select regions

***Location:*** TBD

***Audience:*** Volunteer prospects, NTLs, CTMs

***Attendance Goal:*** TBD

***Trainer(s):*** FOs, RFDs, DFDs, Senior Staff

***Date/Date Range:*** September TBD

DEPARTMENT INTEGRATION

The Training Department exists to ensure all Field Staff and volunteers have the skills and tools needed to execute the Florida Field Program. In order to sufficiently train the largest field organization in the country, the Training Department will need to work well with other departments for the following reasons:

* In order to be successful, the entire Field Team—both staff and volunteer—must be well-versed in tools overseen by other departments, such as VAN, Dashboard and BO.com.
* The Field Team, particularly staff, must understand how Field interacts with other departments.
* Departments such as Data and Digital will need a strong training program in order to ensure all staff and volunteers are up to speed on tech tools, especially those with frequent new developments, such as Dashboard.
* All trainees, whether staff or volunteer, should be exposed to experts in the field in which they are being trained. For that reason, trainers from all departments will be needed frequently at staff and volunteer trainings throughout Q2.

In order to keep all on the same page and ensure these departments complement each other to the greatest extent possible, the following practices will be adopted in Q2:

* The Training Director will meet once a month with the head or training lead of each department, in order to discuss interdepartmental projects for the month ahead
* The Training Director will meet at least once a month with the Field Director specifically to brief him on all interdepartmental projects regarding training
* The Training Director will send out a bi-weekly memo to all HQ staff to keep all departments abreast of upcoming training programs, priorities and departmental needs
* Prior to each major training, the Training Director will build a Training Team comprised of all who will either develop content, lead presentations, or help with logistics, including both field and non-field staff. The Training Team will convene to discuss processes and timelines and will work together to plan and execute each training.
* Prior to each major training, all field and non-field staff who will lead presentations will complete a practice session and receive feedback in order to polish the delivery of the material.
* Following each major training, the Training Director will prepare a debrief memo which will be shared with all those involved in the training, which will include quantitative and qualitative feedback from trainees, analysis from the Training Director, and recommendations for future trainings.

REQUESTS FROM CHICAGO HEADQUARTERS

Surrogates:

* In Person at June 6 FO Training: Jeremy Bird, Mitch Stewart, or Marlon Marshall
* In Person at June 23 Neighborhood Team Conferences: At least three of the following (one for each conference):
  + David Simas
  + Regina Schwartz
  + Jeremy Bird
  + Marlon Marshall
  + Jim Messina
* Webinar Appearance for Summer Fellows any time after June 26: Regina Schwartz or David Simas

Materials:

* Voter Education Training Module Template