OFA

ORGANIZING

MANUAL

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

— Barack Obama, 2009

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

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

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

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

YOU ARE OFA

OFA Chapters and Teams

Why Chapters and Teams

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

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

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

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

History of the Chapter Structure

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

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

Chapter Responsibilities

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

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

## Chapter Role Descriptions

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

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

ROLE	RESPONSIBILITIES
Digital Lead	Trains team-level digital captains to guide their volunteers to take photos and use social networks. They also compile information and make sure content is getting collected and posted.
Press Lead	Handles relationships with press outlets at a regional level. They build relationships with press and connect them to a chapter's actions. Tasks include sending out press advisories, making press calls and accommodating the press during events.
Issues Lead	Provide materials, training, and guidance to teams about each issue campaign in a timely fashion. They manage relationships with other organizations on their designated issue at a chapter level. If a team has an issue captain, the lead will work directly with them on team strategy and tactics. Depending on region and state, some or all of these issue leads will be necessary: • Gun Violence Prevention Lead • Comprehensive Immigration Reform Lead • Climate Change Lead • Obamacare Lead • Women's Issues Lead • Budget/Economy Lead

Chapter Structure and Development

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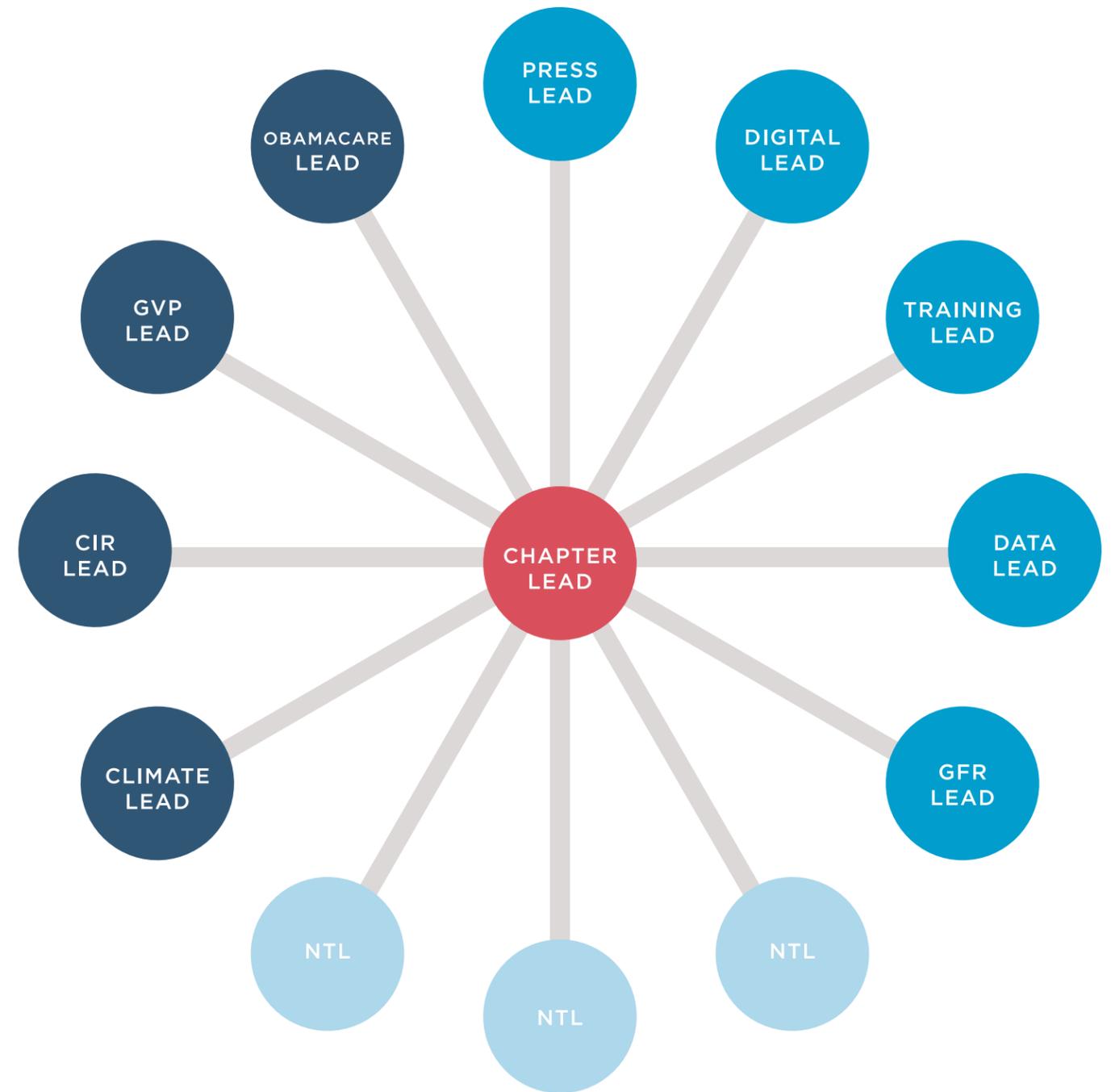
● = Core baseline roles

● = Varies by chapter depending on priorities

● = Each manages a team; number of teams per chapter will vary

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

POTENTIAL CHAPTER	BUDDING CHAPTER	CERTIFIED CHAPTER

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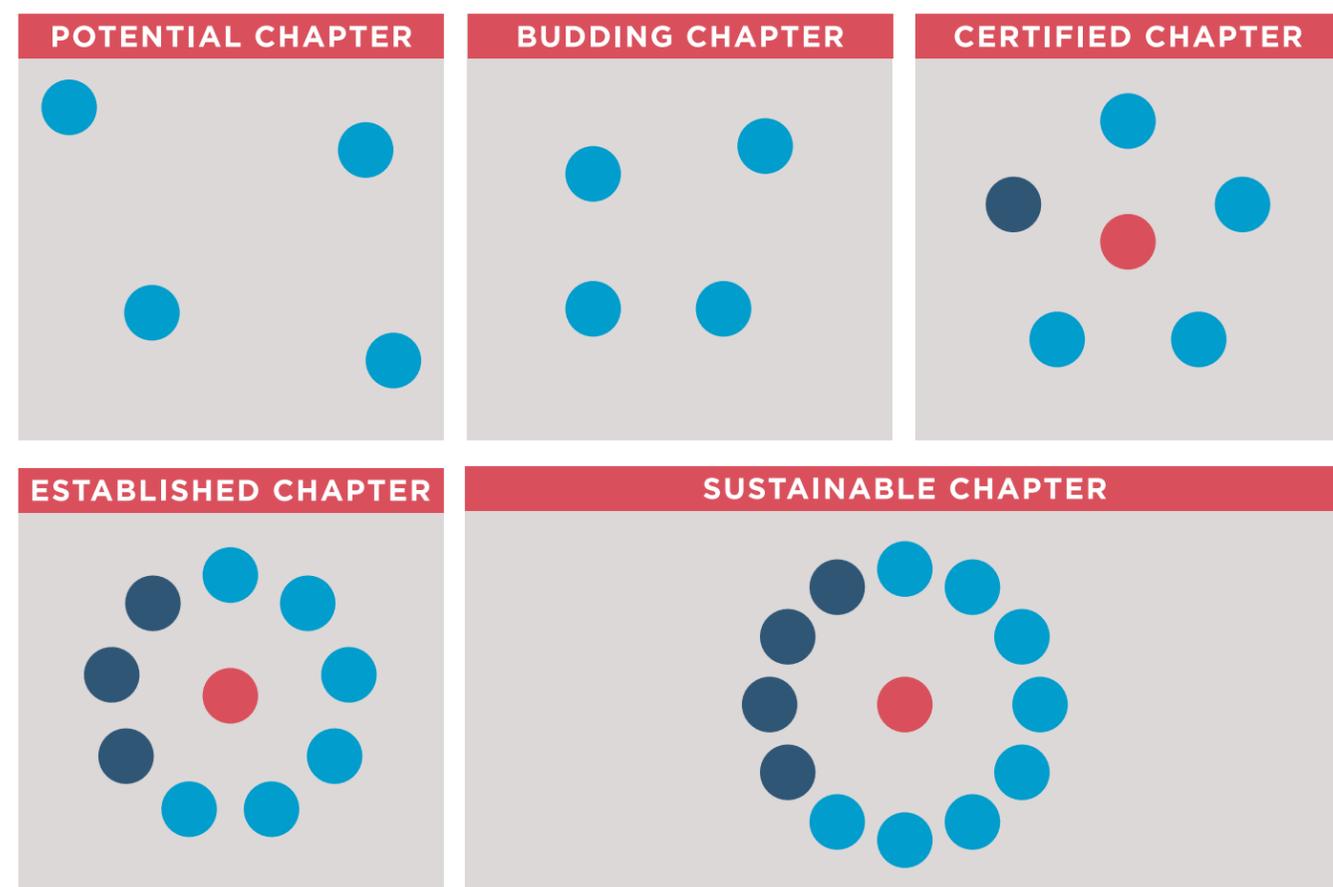
Phase 1 (Potential): Volunteers and volunteer prospects exist, but are not working together to carry out any of the functions of a chapter.

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

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

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

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

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

Team Responsibilities

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

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

Team Role Descriptions

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

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

Team Structure and Development

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

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

Testing and Confirming Leadership

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

PROSPECT

- PERFORMS
- SKILLS ASSESSED
- INTRO 1:1

TEST 1

- ASSISTS
- TRAINED
- COACHED
- ESCALATION 1:1

TEST 2

- LEADS
- TRAINED
- COACHED
- ESCALATION 1:1

CONFIRM

- ORGANIZES
- TRAINING ONGOING
- COACHING ONGOING
- MAINTENANCE 1:1

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

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

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

APTITUDE & WILLINGNESS