

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

## **Part I: Who We Are**

- OFA Mission
- OFA Culture and Expectations

## **Part II: Building Strategic Issue Campaigns**

- How a Bill Becomes a Law
- OFA Issue Organizing Strategy
- Power Mapping
- Earned Media
- Digital Organizing
- Talking About the Issues through Personal Stories
- Crafting Your Local Strategy

## **Part III: OFA Chapters and Teams**

- Why Chapters and Teams
- History on the Chapter Program
- Chapter Responsibilities and Phases of Development
- Chapter Structure
- Chapter Role Descriptions
- Team Responsibilities and Phases of Development
- Team Structure
- Team Role Descriptions
- Testing and Confirming Leadership

## **Part IV: Methods for Building Capacity**

- Personal Story
- 1:1 Meetings
- Volunteer Recruitment and Retention
- House Meetings
- Trainings
- Why data is important

## **Appendix A: Step-by-step guides**

- Event Organizing 101
- Organizing a Press Event
- Organizing a MOC Office Visit
- Blizzarding
- Getting sign-on: Petition and Pledge Card Drives
- Writing Letters to the Editor
- Pledge-to-Call Drives
- Taking Strong Photos
- How to organize a House Meeting
- How to organize a Training

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

# 4

## Methods for Building Capacity

Personal Story

1:1 Meetings

Volunteer Recruitment and Retention

House Meetings

Trainings

Why Data is Important

Organizing for Action chapters and teams continuously have two priorities in their organizing — to achieve the goals of our issue campaigns, and to build their local organization by recruiting new volunteers and developing them to take on leadership roles. The methods in this section focus on how to bring new people into our movement, integrate them into the actions of the chapter, and prepare them to take ownership of organizing responsibilities.

### Relationship Building and Our Movement

Relationships are the bedrock of organizing. You can think of each individual in a community like a thread. If the threads have no relationship with one another, they are very weak. If a fabric were woven from the threads but the connection between them was not very close, then the fabric would easily tear. However, if the fabric is woven so that the threads are very close and very tight, then the fabric will be strong. Relationships in organizing weave the individual people in our movement closer together, and combined they are much stronger than they could ever be alone.

When volunteers build relationships they help new supporters connect with the issues we care about and commit to our strategy for advocating for them. Relationships help volunteers commit to each other and keeps them engaged, even when things get tough.

As an organizer, you have to work to develop relationship with your volunteers, but you also have to facilitate relationship building between volunteers. As a result, when we talk about relationship building, we actually think about it in a couple of different “directions.” The tactics we use to move chapters and teams through the stages of development will always either help them connect to the organizer “vertically,” or connect to each other “horizontally.”

Let’s briefly review the tactics we use to relationship build vertically (between you and potential volunteers/team members) and horizontally (amongst potential volunteers/team members). Take a shot at guessing whether each of the below defined tactics builds mostly horizontal relationships or mostly vertical relationships. We’ll dig deeper into these tactics later on in this section.

TACTIC	DEFINITION	MOSTLY VERTICAL?	MOSTLY HORIZONTAL?	WHY?
<b>One-on-One Meetings (1:1s)</b>	An intentional, pre-scheduled meeting with a volunteer or a potential volunteer to discuss work to be done or check in on work that's being done. If it's an introductory 1:1, you share stories and make an ask for the person to get involved. If it is a maintenance 1:1, you can check in on progress to goal. Escalation 1:1s move people into a new role or help them take on a new challenge.			
<b>House Meetings</b>	A meeting of five or more volunteers or potential volunteers. A house meeting occurs in a volunteer's house and usually lasts an hour and a half to two hours. It contains a social component, discussion about how to take action in the community to achieve a specific goal, and next steps.			
<b>Skills trainings in small or large groups</b>	Trainings have set agendas, goals, and visual materials where we intentionally: build relationships, teach important skills, gain buy-in to our strategy, and provide ample opportunities for participants to practice in a safe setting. The length of a training varies.			
<b>Action Planning Sessions</b>	Weekly, bi-weekly, or monthly meetings where core teams (and sometimes additional prospects or volunteers) come together to get caught up on progress to goal and strategize/plan for the future.			

Now, take a moment to think about some activities focused on moving our issue campaigns forward. Much of our local strategy will focus around actions like the below. How can you ensure that everything we do with volunteers and teams provides relationship-building opportunities, even issue advocacy events?

TACTIC	HOW COULD YOU ENSURE THIS IS A VERTICAL RELATIONSHIP BUILDING OPPORTUNITY?	HOW COULD YOU ENSURE THIS IS A HORIZONTAL RELATIONSHIP BUILDING OPPORTUNITY?
Press Events		
Blizzarding		
Pledge-to-Call Drives		



OFPA

## Personal Story

All of us have a personal motivation for deciding to dedicate our time and energy to organizing around progressive policies. Policy's real meaning is the difference it can make improving people's lives in communities across the country. Your personal story will build a connection between the policy vision and constituents and potential volunteers in your community. You are the messenger for our movement! It is within each of us to make this connection, to illustrate and bring to life the real stories and impacts this policy agenda will have on everyday Americans.



## Why Do We Use Personal Stories?

Which statement impacts you more:

- 1 The Affordable Care Act is providing an opportunity for millions of uninsured Americans to get access to affordable health coverage and has eliminated discrimination against children and adults with pre-existing conditions.

*Or...*

- 2 Obamacare assures all Americans that they can have access to health insurance; this was important to someone like my dad who has a rare heart disease and needs an expensive medication to keep him alive. We were always worried if he changed jobs that he wouldn't be able to get on a new insurance plan because of his pre-existing condition. Now we know that he'll always have the right to purchase medical insurance.

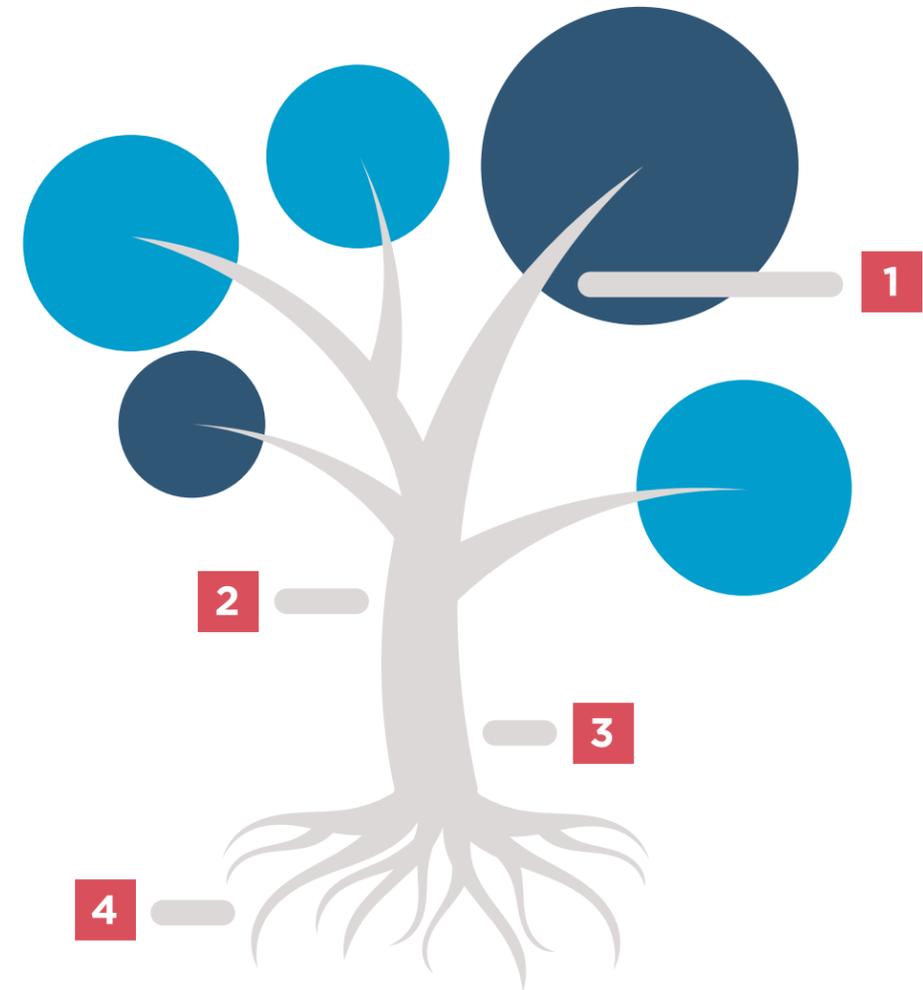
Through the telling of personal stories, our issue campaigns become less about complicated, abstract policy and more about real life. Personal stories are a way of connecting with other volunteers, neighbors, coalition partners, and friends. When we share our motivations, our challenges, our decisions and their impacts, we tap into a more human place and we begin to build a relationship. Building these relationships with as many constituents and potential volunteers as possible helps us drive the narrative on why our position is important for our community, and builds our power to persuade our Member of Congress to support our agendas.

## Telling Your Personal Story

In this movement, personal stories are a foundational piece of our work. This movement is about neighbors talking to neighbors and, through personal stories, we make connections to our own motivations for action on behalf of the policy issues we care about. This tool is a core element of how we build chapters and teams because organization building is all about relationship building. It is also how we connect with constituents — by relating to their concerns and connecting over shared issues and values.

As a volunteer with OFA, you will be asked to use personal stories in various ways and contexts, but most often your story will be the base of your volunteer recruitment efforts and constituent outreach activity.

We think of our personal story like a tree — the roots connect us to our values and formative life moments, the base is our anchor to organizing, the trunk helps us build connection, and the branches are the many ways we can use our personal experience to reach out and touch others. Using this image of a tree, we'll talk about how you can develop your own personal story as a tool for organizing.



- 1 = branches:** the various issues, constituencies, and different ways that you will connect with people
- 2 = trunk:** asking questions and listening, so you can make a connection between you and the listener to build a relationship
- 3 = base:** your core story; the anchor from which you will build other stories from
- 4 = roots:** strong foundation of personal motivations, issues, and key life moments

## Phase 1: Understand the Foundation: Story Tree

All of us have roots—experiences and values that make us who we are. The story tree helps us visualize how we develop, use, and interweave our stories with those of others.

## Phase 2: Understanding your Roots

Everyone has many personal stories. Finding your stories requires reflecting back on a key moment of your life when you were motivated to action, made a decision to get involved, or made a choice that turned your life in a different direction. As a leader, you must familiarize yourself with your own motivations so you can use that passion to motivate others. Take a few minutes to reflect on this. This will become the root foundation of your personal story.

Why have you volunteered with OFA? What motivated you to take action? Reflect on what brought you here and what life moments influenced this.

Next, think about the issues that resonate with and motivate you. Being able to connect your issue interests with your life experiences is a key tactic for illustrating why the OFA agenda is important for the lives of people in your community.

What issues resonate with you? What happened in your life that inspire you to care about these issues? Do they connect with the moments you listed above?

At the core of your personal motivation and the issues that resonate with you, are values that you share with other OFA volunteers. These values get to the heart of why you are volunteering to support OFA's mission and policy agenda. They speak to a belief in a certain ideal.

From the issues you listed above, which values resonate from those issues? Which values of OFA and its agenda do you connect with? What beliefs and ideals do you have?

All of these questions should help you fill out the roots section of the tree. Your values, life experiences, choices you've made, issues that have impacted you, policies that have or will impact your family — they're all a part of your roots.

When you interact with volunteers, constituents, or coalition partners, you will draw from these to relate to them. You'll also use this information to form the base of your tree, or your core story from which you will learn to adjust to different audiences and issues.

## Phase 3: Discovering your Base Story

A personal story, or your base story, is not a life story or history, nor is it a re-telling of all of the things that have happened to you in your lifetime. It is a focused illustration of a key moment in your life motivated you to take action for issue advocacy. You will pick one key moment out of many depending on who you are interacting with and what policy issue you are advocating for. This is why asking questions is so important.

### Step 1: Challenge

Pick a key life moment or pivot point in your life that caused you to think differently about the world, brought you closer to a policy issue, was a challenge you faced, or was the motivating factor that brought you to volunteer with OFA. This should be the main event of your story from which you will build the plot and expose something about yourself to your listener.

### Step 2: Choice

This moment should move you to a point in which you will make a decision on which direction you will move towards — taking action on behalf of the issue. It is often an escalation point of your main event in which you are called to make a decision, and choose a path leading in a particular direction.

### Step 3: Outcome

From here, you'll round out your story with the results of that decision. Describe the outcome that emerged. This could exemplify how you ended up volunteering with OFA, or could connect back to the values or issues that resonate with your listener. Either way this element should bring the story to an inspirational close, showing that when make a decision to take action, it can make a difference

### **Practice #1:** Quick Write

Often the details are what make the most effective stories powerful. Before you verbalize your story, take a few minutes to write out some details about steps 1-3 above. What did it feel like, look like, or sound like? Try to describe these key points in your story in a way that helps the listener understand what it was like to be there.

**STEP**

**PERSONAL DETAILS**

**Step 1: Key life moments or “challenge”**

**Step 2: Decision point or “choice” stemming from the key moment**

**Step 3: Results of the decision, or “outcome”**



Like a tree, your story will continue to grow as you become more rooted in organizing your community. As you talk to more of your neighbors and listen to the reasons they support the OFA policy agenda, you’ll learn how to draw upon your own experiences to adjust your story for different situations. As you do so, your organizing relationships with fellow OFA volunteers, coalition partners, and members of your community will strengthen.

Read Cesar's personal story below. What is the challenge he is facing that relates to a problem our country is facing? What has he chose to do in the face of these challenges? And what is the outcome of his choices?



### **Cesar F, Tucson, Arizona**

My name is Cesar. I am a first generation American. My parents came from Mexico, a land of poverty, zero prosperity, and hardship. They came from absolutely nothing to the United States. I have seen first hand with my family in Mexico what it's like to work until your hands bleed, and still not be rewarded for your dedication. My parents at times while growing up in Mexico didn't have shoes. The reasons that people have today for coming to the United States are no different than the reasons the generations of immigrants before us and our Founding Fathers had. They came here because this beautiful land offers a chance, hope, and an opportunity called the American Dream. The United States offers people an opportunity to do big things if your wiling to work hard, the U.S. rewards you like no other country in the world. My mother and father are living the American Dream and they have struggled, but not without reward. My father when he arrived in the U.S. had an elementary education, and knew zero English; he was able to overcome those challenges and be somebody. I am now a college student here in Tucson AZ, and an Organizer with Organizing for Action; I am working on Immigration Reform. I just recently got back from Washington D.C. for the Action August event, and I left with a lot of hope and a fire in my belly because there were hundreds of volunteers and organizers from all over the country fighting for people who are stuck in limbo. I fight everyday with my team for millions who are living in the shadows, and for people who are just looking for a chance. Their pain and struggle is my motivation. My message is to not lose HOPE, to stand with us, and fight along side with us; we will get there!

## 1:1 Meetings

When it comes to community organizing, there is no substitute for direct person-to-person interaction. Personal interaction and shared experience establish the strongest bonds, and provide the most compelling incentive for engagement. This is why one-on-ones are a bedrock OFA technique for bringing new volunteers into our chapters and teams, for developing volunteer leaders, and for maintaining relationships with active volunteers.

One-on-One Meetings (1:1s) are intentional, pre-scheduled meetings with a volunteer or a potential volunteer to discuss the organization, plan work to be done, or debrief completed actions. In OFA we talk about three types of 1:1s:

- 1** **Introductory 1:1s:** This is a personal meeting between a new volunteer or volunteer prospect and a volunteer leader. Often times an introductory 1:1 is a supporter's first interaction with the organization - a point of entry where they learn how what OFA's mission is and how they can contribute.
- 2** **Escalation 1:1s:** When a volunteer has completed the testing process for a leadership role (refer to page 60 to read more about this process), the organizer will hold an escalation 1:1 to confirm the volunteer to their new role. In this meeting expectations are discussed for what the new leader will need to do and how the organizer will support them to make sure the new leader is successful in the role. This conversation ends with a commitment of the newly confirmed volunteer leader to fulfill the expectations of the role.



- 3** **Maintenance 1:1s:** For volunteers fulfilling leadership roles in their chapters and teams, maintenance 1:1s with their OFA organizers are essential for helping them be successful in their roles and develop their skills. Maintenance 1:1s are the best way for chapter leads or neighborhood team leaders to continually work with the leads and captains they coordinate to help them reach goals and plan successful actions.

Because of the different purposes 1:1 meetings can serve, they each have different agendas. However, all 1:1s share these characteristics:

- **Face-to-Face:** 1:1s are conducted in person and in a quiet place.
- **Scheduled:** 1:1s are scheduled in advance for 30-45 minutes.
- **Purposeful:** 1:1s have an agenda and purpose. They are not about chit-chat.
- **Educational:** 1:1s are about listening. The organizer or volunteer leader should absorb where the other person is coming from and seek to understand what they are saying.
- **A Place to Share Strategy:** The organizer should clearly explain how what the volunteer is being asked to do will contribute to a larger strategy for success of the issue campaign.
- **Require Rigorous follow-up:** The onus is on the organizer to follow up afterward and help the volunteer be successful in engaging in action.
- **End with an ask and action item(s):** Organizers should go into every 1:1 meeting knowing a few actions they might want to ask the supporter to take. Then, upon learning more about the supporter's background, skills and interests, the organizer should prioritize the most appropriate ask for the situation.

## One-On-One Agendas

Each type of one-on-one will have a different type of agenda. You don't need to think of these agendas as a rigid structure, but rather as a guide to lead your conversation. Remember that the primary purpose of one-on-ones is to build relationships and personalize our organization to the needs of individual volunteers. Here we'll look at sample agendas for each type of one-on-one meeting, which can be adapted according to volunteers' needs.

### Introductory One-On-One Agenda

**Purpose:** Explain the purpose of the meeting — to get to know them, tell them about the OFA's mission and figure out together how they can be involved locally.

**Connection:** Ask questions about why the volunteer is interested in Organizing for Action. What issues resonate with them? Why do they care about these issues? What has been their past involvement in community organizing? What do you have in common?

**Story:** Share your personal story, relating to the issues or values that you share with the volunteer. Connect your story to how OFA's actions on these issues will make an impact.

**Strategy:** After you find shared values in your stories, explain the overall vision of OFA, and how the OFA strategy nationally and locally will help both of you achieve your shared vision together.

**Ask:** Make a hard ask that the volunteer get involved in a specific activity at a set date and time. A successful 1:1 meeting ends with a commitment to take action that includes a specific date, time, and goal.

## Escalation One-On-One Agenda

**Debrief:** Review the volunteer's last activity. Ask questions in order to understand the result of the event, how the volunteer felt about the result, any challenges the volunteer faced in putting it on, and any resources the volunteer drew upon to overcome challenges.

**Praise:** Look back on all the actions the volunteer has taken since starting her work with OFA. Point out successes and growth over that period.

**Need:** Explain the team's need for a volunteer to take on the leadership role. Connect the volunteer's skills and accomplishments with the responsibilities associated with that role and with the chapter or team's needs.

**Ask:** Make a hard ask for the volunteer to assume that specific leadership role and carry out the responsibilities associated with it.

**Agreement:** Review with the new volunteer leader what your expectations of them will be, and what support they can expect to get from you as the organizer. The new leader should leave with a clear understanding of her role, and a plan for next steps in that role.

## Maintenance One-On-One Agenda

**Debrief:** Ask for feedback about the volunteer leader's most recent activities. Ask questions to probe whether the chapter/ team is growing and more people becoming engaged, or if progress to goals reflects just the work of a few people. Ask about specific actions the leader has coordinated.

**Teach:** Take time to build skills the volunteer leader needs. This can be based on challenges the volunteer has identified during debrief, further skills the organizer sees important to develop in the volunteer for her continued growth, or updates to technology or organizing techniques being introduced by OFA on a national or statewide basis.

**Goals:** Review the chapter/ team's progress to goals, and set specific goals for the volunteer leader. Assess whether the team is on track to meet goals, or if other secondary goals need to be established in order to meet larger goals (e.g. in order to have more attendance at the next event, make a goal to make more volunteer recruitment calls). Clarify and repeat back what support the volunteer leader needs to be successful in achieving these goals.

## Following up on 1:1s

After you've had a 1:1 meeting, follow-up is essential to both building the relationship and ensuring action. Organizers must follow up on 1:1s to express gratitude, ensure completion of initial commitments, and deepen relationships. Follow up includes but is not limited to:

- **Expressing Gratitude:** Write thank you notes, send emails, or make follow-up thank you calls. You can also mention people you have a 1:1 with on social networks.
- **Reinforcing Commitments:** Follow up with reminders about commitments made during 1:1 and monitor progress to those goals.
- **Keep promises:** During your one-on-one meeting, keep a list of any commitments you make to the volunteer. Make sure to fulfill these commitments in a timely manner. Relationships are built on trust, and you build trust as an organizer when you keep the commitments you make to volunteers.
- **Deepen the Relationship:** Add introductory 1:1 volunteers to your email lists and social networks. Call them periodically to check in and ask them for help in future endeavors.
- **Build a Relationship Beyond the Local Team:** When possible, follow up with non-asks. Call to give general updates about the organization and talk large-scale strategy. But keep it social as well.

## House Meetings

House meetings are gatherings of supporters in a neighborhood location. The purpose of a house meeting is to persuade, organize, motivate, and activate volunteers. House meetings are particularly effective at expanding the OFA supporter network and bringing new people to our movement, because through them hosts invite their personal social network to learn about OFA. House meetings are effective in motivating new supporters to take action and also to become grassroots donors to OFA.



House meetings are effective not only at recruiting new volunteers, but building horizontal relationships between volunteers in a chapter or team. They are an effective technique for chapters or teams that are in the first or second phase of development because it brings new people into the organization and can help transform a group of individuals into a coordinated team.

House meetings can be powerful tools, but they must be run properly in order to be successful. OFA house meetings have four main goals:

### House Meeting Goals

- 1** Build neighborhood teams by bringing like-minded members of communities together to hear about OFA's issue campaigns and strategize together
- 2** Generate enthusiasm and build relationships
- 3** Aid in the identification, testing, and development of potential volunteer leaders
- 4** Develop clear Next Steps:
  - Plan how the team will build for and execute action
  - Establish associated events needed to reach attendee goals for those days of action, identify leads

*See the appendix for a guide on the process of planning, executing, and following up from your house meeting.*

House meetings build community among volunteers and bring new supporters into the OFA family, so they are a great technique for building a team or chapter and motivating new volunteers to take action!

### Trainings

Trainings are another key organizing technique for building capacity in our organization. Trainings can be educational about the issues or hands-on in training on new skills; the audience can be experienced leaders developing their skills or brand new volunteers getting their first taste of phone banking; the length can be all-day, several days, or just a couple hours. Trainings are essential in a grassroots-led organization because they prepare volunteers to execute well-organized actions and prepare volunteer leaders to plan, strategize, and lead those actions.

*Every OFA training has four overarching goals:*

- 1** Build relationships
- 2** Teach concrete skills
- 3** Earn buy-in
- 4** Lead to action

By facilitating volunteer trainings with these goals, trainings become not only an opportunity to present information, but a venue to strengthen teams, develop leaders, plan strategically, and prepare volunteers to take their next steps with applying what they've learned.

### Organizing a Training

When organizing a training for your volunteers, it's important to consider what information, skill, or planning will help grow or develop your local organization.

Let's consider an example of a phase 2 chapter. This chapter has successfully organized an action once every two weeks and has about twelve volunteers who come to an event once a month. When an action happens, the organizer will talk to various members of the group about taking on certain roles, but none of the volunteers consider themselves to have a special expertise or confirmed role on the team. You want to use a training to prepare more of the regular volunteers to take on leadership roles. This will move your chapter towards phase 3 of development.

What does this chapter need to move from phase 2 to phase 3?

How could a training be used to accomplish these goals?

What topics would you train on for this purpose?

Who would the best trainers be for this training?

What action will come result from your training?

One way you could use training to move this chapter from phase 2 or 3 is train volunteer leadership prospects on specialized skills that would relate to their future role. For example, you could design a training that includes these modules:

- Earning Media Coverage
- Telling the Story
- Digital for Issue Organizing

After providing this training, your action might be a press event where you can test a potential press lead by letting them do the pitch calls and setting up the event and a potential digital lead by asking her to take photographs and post them to social networks. A training can give the prospects the skills they need to pass tests for leadership positions.

*See the appendix for a step-by-step guide on organizing a volunteer training for your chapter or team.*

## Metrics Driven

At OFA we talk about our organizing as being “people-centered and metrics-driven.” We’ve already discussed how important relationship building is to organizing. Equally important, however, is keeping track of all the types of contacts we’re making in our community, actions we’re taking on our issues, and volunteers we’re preparing to take leadership. Keeping track of data in our volunteer database allows us to keep track of what we’ve accomplished over time, follow up on work, keep track of our relationships, and build our organization in a data-driven, strategic way.

The bulk of OFA data is tracked in our database, which is our supporter database. Through our database, we track the attendees to our events, the types of events we’re planning, information we learn about new volunteers during one-on-one meetings, where volunteers are in the testing process, the roles volunteer leaders are playing within their chapters and teams, and volunteer prospects who can be called and asked to take action. Tracking this information in our database allows us to assess our organizational strength and potential in each area of the country, and strategize about how we can grow and develop. Data also records the interactions we’ve had with supporters so future volunteers will have a history to reference when they follow-up with those supporters in the future. Well-maintained data is a legacy that chapters and teams are passing down to the OFA organizers who will come after them because it maintains the history of their organizing work and allows future volunteers to build upon that work.

Each team and chapter should determine the best strategy to make sure that their work is accounted for in this volunteer database. Most chapters test and confirm a data lead who pursues in-depth training on our database and can then coordinate additional chapter and team volunteers in making sure data is entered back in our database and pertinent data for actions can be accessed from the database.

Keeping accurate data allows us to evaluate ourselves to ensure we spend our resources in the best way possible. We have different reports, each one summarizing and displaying specific data from our database, which we use to hold ourselves accountable on a day-to-day basis. Those reports also help us determine our strengths and weaknesses as a program. If we are not doing well, we strategize how to do better. This is how we are able to implement winning strategies to advocate for our issues, and ensures that our organization is working in the most strategic and effective way.

Let’s consider how this cycle of people-centered, metrics-driven organizing would work on a particular event. Let’s say your chapter is trying to persuade a member of your state legislature to support marriage equality in an upcoming vote.

You **strategize** that the best way to use your resources is to make sure the Representative knows you're getting the word out in the community and that he has a lot of constituents who support the measure. So you decide to go to his neighborhood to collect petition signatures of his constituents who support marriage equality. Next, you **organize**. You know you can't make a very big impact by yourself, so you use our database to pull a list of volunteer prospects in your neighborhood. After you call them, you mark the result and use the calendar in our database to schedule the people who've agreed to come to your action. Now the time has come to actually **collect** your petition signatures. The volunteers you contacted join you, and you start approaching people to sign. After the event it's time to **report**. Immediately you want to provide a soft report, so that your organizer knows how the event went in terms of petitions signatures collected and how volunteers engaged with the event. After your soft report, you'll enter data into our database so that we know who our petition signers are and we know what volunteers showed up today for our action. After all the data is entered, we begin to **analyze** it. The point of collecting data is to be able to use it to inform our decisions. During the analysis stage, you should look at the data to see if there are patterns that impact your strategy. Finally, we come back to **strategizing** — making a plan for the next action that is based on an understanding of what happened during the first action. In our petition collection example, if 80% of the volunteers who said they'd come to your action didn't show, you might change the way that you're making the volunteer ask or look at what kind of reminders people might need.

For every action we take as an organization, it's important to report data so that it can be analyzed and our strategy adjusted to be even more efficient and impactful. This is how as an organization we're able to use data to become increasingly better organizers.

