Engagement Organizing

The Culture and Technology of Building Power

By Matt Price and Jon Stahl

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About the Authors

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I: The Why

Sarah Cobler of Montana Conservation Voters (www.mtvoters.org) looked at their list of 100,000 people in a state with a population of only a million. So why weren't they winning more? She and her colleagues realized that they didn't know enough about the people on their list and what moved them to action. There wasn't a deep enough relationship.

Will Horter of Dogwood Initiative (www.dogwoodinitiative.org) in Victoria, BC thought he was probably working on the wrong things because the tools weren't available to do otherwise. "I kept trying to create power maps on spreadsheets and in my memory, but since the human brain can only maintain approximately 200 relationships I quickly exceeded capacity. I needed new systems."

Rick Johnson of Idaho Conservation League (www.idahoconservation.org) knew his organization was positioned properly on the issues because of public opinion polling and the interest that media was showing in his organization's work. But he also knew that, "In the end, it's vapor. Politicians know we represent the sensible middle, but we didn't have a red button to push to demonstrate it, to make people go nuts or say 'Yipee.' Unless we can do that, we're hobbled."

The challenges these people and organizations face are symptoms of a broader change that is underway between one era of advocacy and another. The shift is being driven by new social and political realities as well as by the rise of new technology and communications platforms.

It's difficult to understand this change fully when we are still in the middle of it, but we believe that the successful organizations of tomorrow will invest time and courage in debating what is happening out in the world so that they can respond with the sometimes hard changes inside the office.

After observing dozens of organizations in the U.S. and Canada, and having the privilege of interviewing several for this paper, we are excited by one emerging response that we are calling "engagement organizing." Like most innovation, there's little if anything here that's truly original, but rather a new combination of familiar elements. This paper is one attempt at describing the elements of that innovation, and we hope that it will advance our collective conversation about how to build organizations capable of driving enduring progressive social change in a networked age.

Leaders need to figure out how to transition from a mentality of 'Whose list is biggest?' to 'How can we leverage our committed supporters to affect meaningful change?'

—Matt Browner-Hamlin

Bell Bottom Blues

Much of the way we do issue advocacy today is rooted in assumptions laid down in the 1970's. Building on the mass mobilization movements for change from the 1960's, the 1970's saw the rise of single-interest membership organizations that worked mainly through Enlightenment-style truth telling, deep issue expertise, and direct access to decision makers who seemed ready to listen.[1]

People could express their civic identity by becoming dues-paying members of issue advocacy organizations. In theory, membership came with a vote in organizational governance, but more importantly, it came with ever more sophisticated direct mail fundraising. And, before the invention of the internet, communication with members at scale was expensive and almost entirely one-way, leading to a reliance on earned media and the rise of the quarterly newsletter. If an organization needed to prove to a decision maker that the public was in support of a proposal, an opinion poll would often suffice. Outside of donating, the role the public played was largely passive.

For a while this model led to progress, with politicians from all sides of the aisle responding with new laws and policies that moved the ball forward, maybe not far enough or fast enough, but still forward.

But times change. The public has become less trusting and more cynical. Politics has become more fiercely competitive. Many political parties have become highly organized, well-funded and ideologically disciplined. As a result, consensus building has been increasingly replaced by partisanship, and many items on the public agenda are quickly co-opted into an all-out war of "us" against "them."

In this environment, truth-telling no longer drives law and policy outcomes, since political "truth" is now more a matter of mobilizing voters than mobilizing facts. It's true that progressive social change movements have won important victories in the courtroom, but court battles can ultimately reinforce polarization and partisanship while failing to build consensus around broadly shared values.

Our problem in a nutshell is that we haven't caught up with these changes, regrounded our social change movements in the hard-won lessons of the 1960's—updated for the networked age—and rebuilt our advocacy model around mobilizing consistently and at scale.

The role of the internet and social media in this shift is a complex one. On the one hand, it has facilitated the fragmentation of social communication based on narrower interests and values, reinforcing the trend away from consensus build-

1 Philip Shabecoff's book *Earth Rising: American Environmentalism in the 21st Century*, offers good background on this history.

ing in society and in politics.[2] On the other hand, the internet has provided a new and easy way of connecting people to causes and to each other, which in turn has lowered the bar to group formation, resulting in an explosion of both new organizations and supporters.[3]

Few single-issue organizations can now fund themselves using the direct mail fundraising models pioneered in the 1970's. The rise of the internet means that communication is now immediate, relatively inexpensive, and many-to-many, rather than a one-way broadcast. This fundamentally changes the strategic possibilities for organizing, as well as opening up new potential pitfalls.

Lately, there has been much soul searching about the difficulty of bridging online to offline, of translating often large email lists to moving decision makers or voters at key moments. These efforts often fall short.[4] We now know that politicians often feel able to discount mass email campaigns.[5] Recent primary candidates in Illinois[6] and Washington State[7] were backed by groups with large email lists relative to the number of votes needed to swing their races, but lost for a variety of reasons, one of which was the perceived inability to translate these lists into the machinery needed in elections.

If you can't turn out your members to vote, then they aren't really your members.

—Matt Stoller

In the end, as in the beginning, the most effective tool for mobilizing supporters to ever larger investments in action is also the oldest one—talking to them in person. Every one of the organizations we interviewed for this paper described the point of their work as getting to this face-to-face relationship, realizing that this is where the power is. The real art and science of it, though, is doing this consistently and at scale.

Three Guys Walk Into a Bar...

Some groups are figuring this out, and we believe they are pioneering a new model for powerful, cost-effective social change. We call it "engagement organizing." It's not a formula, not a cookbook, but instead a set of general principles. Engagement organizing is firmly rooted in proven, community organizing methods, but it remixes them with new technology and best practices concerning organizational culture and leadership. It's the punchline to a joke that begins: "Saul Alinsky, Mark Zuckerberg, and Jim Collins walk into a bar..."

2 See Eli Pariser's book *The Filter Bubble* and http://thefilterbubble.com/
3 See Clay Shirky's book *Here Comes Everybody*.
4 See Malcolm Gladwell's "Small Change: Why the Revolution Will Not Be Tweeted" (http://www.newyorker.com/reporting/2010/10/04/101004fa_fact_gladwell) for a flawed but important discussion of this.
5 See for example Shayna Englin's talk on "The Advocacy Gap" from Personal Democracy Forum 2012: https://www.youtube.com/watch?v=fhnkEJ6q5Uk
6 http://www.nakedcapitalism.com/2012/04/internet-democrats-take-a-beating-in-illinois.html
7 http://techpresident.com/news/22714-op-ed-darcy-burner-netroots-didnt-lose-washington

The core principle of engagement organizing is that power is built by recruiting and mobilizing relationships between and among supporters, reaching a point where your supporters themselves are leading the charge.

Engagement organizations work on building power in targeted communities and political geographies so that they can hold specific decision makers accountable. Engagement organizing places in-person contact at the heart of the relationship building process, and gets there with technology systems that help organizers target, track and mobilize relationships. Engagement organizing is a process for learning. It emphasizes continuous gathering and evaluation of data, learning from failure as well as success, and rapidly adapting to changing circumstances and new information.

In the next two sections of this paper, we'll draw on several case studies to first introduce the What of engagement organizing—the ingredients for success you need inside your organization. Then, we'll talk about the How—putting the elements into motion out there in the world.

II: The What

Rick Johnson in Idaho realized his organization was avoiding the question: What things do we need as an organization to get better? “In some ways, the status quo was working for us. We made budget, we paid people, and we won a bunch of battles, even during a recession.”

So what are the elements you need in your organization to get better at building power? We believe that there are three sets of ingredients—technical, cultural, and structural—that are absolutely essential elements of successful engagement organizing. For those who think it’s all about the technology, there’s no point in having the latest gee-whiz hardware and software if it doesn’t get used to its potential. But, for those who think technology doesn’t matter, good luck scaling up your power by relying on spreadsheets.

Ultimately, engagement organizing is about the marriage of the human and the technical, equal parts organizational culture and systems. As Dogwood’s Matt Takach observes, “There are many points within these systems where there are real live people who need to do things, and that’s the under-told piece of the story.”

Here, then, are the core ingredients of engagement organizing, broken out into technical, cultural, and structural elements.

If there’s anything that I never want to hear again, it’s this statement from a young man I met last week: ‘...I felt so good after I weighed in and signed that petition. I had no idea it was just going to get me bombarded with fundraising requests.’

—Jake Brewer

If I Only Had A Brain (And Preferably Just One)

An engagement organization’s single most important non-human asset is its database. These databases go by lots of names, but we prefer to call them “citizen relationship management” (CRM) databases, which underscores their most important strategic purpose: keeping track of all of your organization’s important relationships with the people who are the source of your power. A successful engagement organization has a single unified CRM database holding information on all of its people. This database is accessible to and used on a daily basis by most staff in the organization.

That’s database nirvana. But what does it look like when an aspiring engagement organization falls short of full CRM enlightenment? It’s a bit like the start of the book Anna Karenina: “Happy families are all alike; every unhappy family is unhappy in its own way.”

Here is some of the unhappiness we see: spreadsheets, lots of spreadsheets. Maybe an Access database or two, usually used by one or two people—or possibly created and abandoned by previous staffers, effectively losing the information. Maybe the Executive Director has all of the major donor records in her personal Outlook contacts file.

In a larger organization, there might be a donor database, but access to it is guarded by the fundraising staff, who are worried that organizers might mess up "their" donor data. Online organizing tools and the organization's master donor database may never talk to each other. A single database administrator is the only person who can run reports, generate lists, etc. Sarah Cobler in Montana laments the days when election season ran their one database administrator ragged.

We could go on, but you get the idea: engagement organizations need to have a single master database that is the sole repository of all important information about their organizing relationships, and it needs to be accessible to everyone in the organization who relies on the information in it, which should be most everyone.

Engagement organizing CRM databases also have political smarts: the power to sort and segment people not just by city, state/province and zip/postal code but also by political geography—legislative districts or ridings, and even by sub-units within those geographies to allow for effective targeting.

Rick Johnson from ICL relates a great anecdote about the power of this in Idaho: "A while ago, we were working to influence budget appropriations and targeted a key committee that had a legislator from a rural district on it who we considered un-gettable. But, he announced that he was voting in our favor because he was 'getting a lot of input from people' in his district. We looked up who'd taken action for us, and found that it was exactly two people—proving that it's not about raw numbers; it's about having people in the right place and activating them at the right time."

An engagement organization's CRM database also has to play nicely with other communications systems. For example, an engagement organization's email broadcasting system draws its subscriber lists directly from the CRM database, so that the organization is always emailing an accurate and current list of supporters. When supporters open emails and click on the links, data about these events flow directly back to the CRM database, so that organizers can quickly identify not only the most effective emails when testing, but also the most engaged activists and what they care about.

An effective CRM system tracks both activism and donations together, since a supporter is a single person with a holistic relationship to your mission, if you treat her that way. Information about online donations flows into the CRM either immediately or via an efficient import process. Engagement organizations have refined their data entry procedures so they are as efficient as possible—and preferably not reliant on volunteers.[8]

Finally, an engagement organizing database is able to track and report on how an organization's supporters are progressing up an engagement pyramid or a ladder of engagement to progressively deeper levels of involvement and leadership in a campaign. We elaborate on this more below.

A unified, integrated CRM database is the price of admission for effective engagement organizing, but it's not enough, as we'll see below. It's not always cheap to go all the way to "database nirvana" but more inexpensive out-of-the-box systems are getting better quickly. The most important advice we can offer is this: invest in your database as if your success depends on it. A database that is a source of pain and frustration will not only make it hard to execute successfully on a daily basis; it will also distract you from your core work of imagining and executing creative strategies that depend on it.

Culture is the environment in which your strategy and your brand thrives or dies a slow death.

—Shawn Parr

Culture Jam

You can have what Abigail Doerr of Washington Bus (washingtonbus.org) calls the "shiny Ferrari" of databases, but still not become an effective engagement organization. The other side of the equation involves specific behaviors that build a culture of data, measurement, learning, and authentic relationships with supporters.

Engagement organizations are not political parties, but they do learn from them, while leaving the icky parts behind. "We want to build generalized power for progressives in order to change the political landscape in Washington," says Fuse's Aaron Ostrom. Will Horter at Dogwood is even more explicit: "My dream has always been the non-partisan political party-like organization that can influence decisions at scale," he says.

What's a quality that engagement organizations import from their political cousins? A culture of lists. In political organizations, the voter file is the sun around which all of their work revolves. For engagement organizations, it's the supporter list. Engagement organizations think of their work as being fundamentally about recruiting supporters and inspiring them to ever-higher levels of engagement in advocacy campaigns and ultimately to leading those campaigns.

This is obviously impossible without the strong CRM databases we've described above, but it also implies another cultural quality that is shared by all of the

8 Matt Takach at Dogwood Initiative warns, "Don't expect to able to rely on volunteers for crazy monotonous tasks like petition data entry." Dogwood now has a paid contractor to handle data entry from hard copy petition forms, and one canvasser who even does his own data entry! Dogwood has polished their data entry procedures to the point where they are now actually doing some contract data work for other progressive groups.

engagement organizations we interviewed: a culture of measurement. Engagement organizations are obsessed with being able to measure their work, assessing its impact and figuring out whether they are getting better at doing what matters most.

A culture of measurement enables a culture of learning and experimentation. Engagement organizations know they don't have it all figured out, but like a technology startup, they know that their job is to figure it out by innovating as fast as possible. "It's never over," says Dogwood's Will Horter. "It's a process of constant evolution. We keep track of things we'd like to learn how to do or get better at, and we revisit that list a few times per year in order to quickly cycle from sticking point to solution."

Matt Takach of Dogwood adds, "If you polled our staff, some of them would still say we're not pushing forward fast enough, but at least we've named it and people know that we are always working towards solutions. We're not too anchored to any one tool; we're willing to swap things out if we are convinced that it's worth it." Aaron Ostrom from Fuse agrees, "We were born digital and a culture of measurement is probably more built into our culture than average. That culture can sometimes conflict with offline organizing. Online we get results right away; the feedback cycles take a bit longer for offline work. We've had to learn to be willing to tolerate failure for longer."

Engagement organizations aren't foolhardy, but they tend to embrace risk and see it as an opportunity for learning, and they structure specific organizational practices around the learning cycle. Fuse's Aaron Ostrom says, "Most of what we do is stuff that we tried once as a creative idea and it turned out to work. We've failed at a lot more than we've succeeded." Fuse plans 'in pencil' in six month cycles, alternating its focus between legislative and elections work.[9]

Jim Dawson at Fuse says, "We have regular team meetings to figure out what is and isn't working, and rapid iteration based on that. Our tactics evolve continuously, and at the end of every six month planning cycle, we have a formal retrospective to make sure we're consolidating our learning for the next go-round." Will Horter again: "Our failures are the most important things. They're how we make all of our most important discoveries."

Beyond The Org Chart

In a successful engagement organization, its senior leadership plays a huge role in shaping the organizational culture. They clearly articulate the mission in terms of engagement organizing, build commitment to the theory of change that is

9 Washington Bus, which, like Fuse, has a hybrid C3/C4/PAC model, has a very similar planning cycle.

implied (people power!), and give staff the resources and autonomy to be creative in pursuing success. Engagement organizing leaders help their teams understand the Why while giving broad latitude to figure out the What and the How. Perhaps more importantly, the senior leadership makes the attitudes and competencies we describe above a central part of the hiring process for all positions in the organization, and as a result, build a team that has a strong shared purpose around engagement organizing.

It can be challenging for established organizations—particularly larger ones—to make a rapid shift towards engagement organizing. Managers of advocacy nonprofits tend to be fairly risk averse, which means they are slow to hire when times are good, but also slow to fire people when things aren't quite working out. Changing staff to get the right people on a bus that's now heading in a new direction is something that many groups find hard to do.[10]

The organizational structure also needs to support and reinforce an engagement organizing culture. What to avoid: many established organizations have senior lobbyists and policy analysts (and sometimes fundraisers), but much more junior organizing and communications staffers. This can result in power imbalances that can block engagement thinking, since senior staff may view their role as sustaining relationships with decision makers or high donors and funders, seeing the activities of interacting with supporters and the public as a secondary add-on for somebody else to deal with.

Instead, successful engagement organizations are relatively flat. Dogwood Initiative, for example, has a team leader structure where a person leading one team may manage a colleague who is her leader on a different team. Everybody owns something significant. Dogwood integrates functions as much as possible. For example, they don't distinguish between online and offline outreach, they just have one outreach program. Finally, Dogwood not only creates time for checking in quarterly on big picture strategy, but also puts on "Dogwood University" once a month where a staffer brings a new reading or resource on improving methodology for everyone to discuss.

More generally, in an engagement organization, all campaigning disciplines—management, lobbying, organizing, fundraising, digital, communications—are involved in setting strategy, owning implementation, and holding each other accountable for high performance. Smaller engagement organizations function as a single unified team. Larger organizations form teams centered around campaigns, and avoid functional silos. However, very few things are done solo; these organizations emphasize teamwork and collaboration, often with volunteers and other partners.

By "organizing," I mean an approach that has at its core a day-to-day, direct relationship with the base.… There are simply no shortcuts to this. We know this because we have spent the past twenty years looking for one and have not found it.

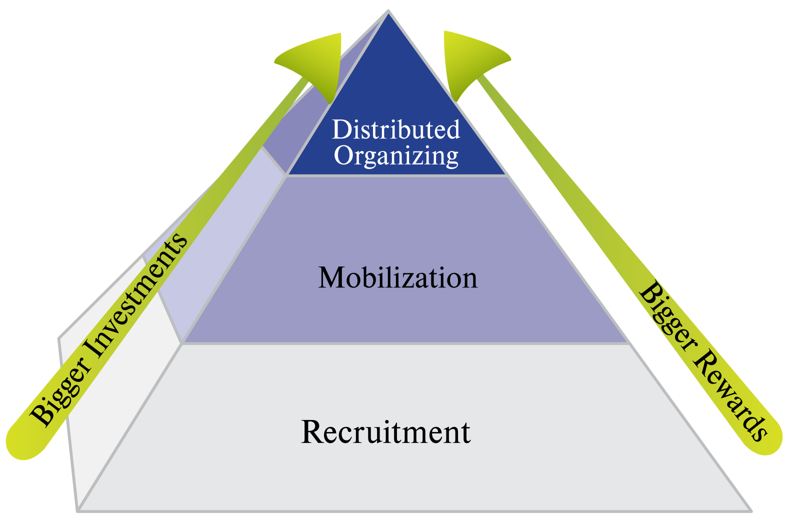
—SEIU Organizer Jane McAlevey

10 See Jim Collins' "Good to Great" http://www.jimcollins.com/article_topics/articles/good-to-great.html for the complete metaphor about "getting the right people on the bus and in the right seats."

This tees up our discussion on distributed organizing just ahead. Engagement organizing intentionally builds towards going beyond a staff-driven model to have super-volunteers helping to lead the charge with the assistance of staff. So, the org chart (and budget) need to anticipate this by making staff time (and money) available for this work.

III: The How

The concept of an engagement pyramid[11] is one way to explain how to put the pieces we've outlined in the previous section into motion. Sarah Cobler of Montana Conservation Voters says, "We already had a strong culture of organizing, and the engagement pyramid gave us a tool to measure our work and to make sure we are being deliberate."



A Simplified Engagement Pyramid

As organizations climb, they must invest more, but reap bigger rewards. Each group must define the levels of the pyramid for itself, but seek to graduate supporters from recruitment through mobilization to distributed organizing.

At the wider bottom of the pyramid, potential supporters are aware of your activities, and the first step is to design activities that recruit of a portion of these observers to your list.[12] Then, at higher levels of the pyramid you work to mobilize these supporters to ever greater investments, whether it's donating, taking action, or even leading action on your behalf. At the pinnacle of the engagement pyramid, you reach the stage of distributed organizing where your mobilized supporters are themselves initiating and leading activities that recruit and mobilize others, and your campaign is able to punch well above its weight (and budget).

11 For much more on this, see: http://groundwire.org/blog/groundwire-engagement-pyramid.

12 Creating awareness and recruitment can and often do happen in an integrated fashion. This is a simplified engagement pyramid.

Let's be fair: one reason that not many groups are doing this well yet is that climbing beyond the bottom rung isn't easy and it doesn't happen unless organizations devote significant staff time and resources to it. The further you go up the pyramid, the harder and more resource intensive it is. But at the same time, it is at these heights where the magic happens. The upper levels of the pyramid are where you raise more money, where you scale beyond your paid staff and out into a much larger network of supporters. It's where you get your power.

Recruitment: The First Date

Before you start building your pyramid, give careful consideration to where you are going to build it. In terms of influence, not all geographies are created equal. For example, Fuse Washington saw a big gap with very little organizing happening in the swing political districts of the Seattle suburbs—a battleground that decision makers care deeply about—and so decided explicitly to work there.

It is equally important to make smart choices about the issue or issues to build on, and to lead with the underlying values they represent. Rick Johnson in Idaho talks about "building power," when his group, for example, recruits doctors and nurses and their supporters to fight the use of cyanide in mining, and of "bleeding power" when they get involved in divisive litigation, even if the lawsuit is successful. Some campaigns widen your base of support to make you stronger for the future, while others can narrow or weaken your base.

Washington Bus, with a youth mandate, knew that working on marriage equality was a winner for them after they saw polling that showed a young person in conservative Mississippi is four times as likely to support it than a senior in progressive Massachusetts. So, know your audience and where you want to end up with them before you develop your tools to reach them.[13] Engagement organizations are always keeping their finger not only on the pulse of their supporters, but on events in the world, and looking for the place where their audience's passion connects with moments that provide the opportunity to build power.

Recruiting supporters can be as old fashioned as circulating a petition at a country fair and as newfangled as the latest social media app that captures names through Facebook. It's about the low risk and low resource first date. Many organizations now do this well, particularly online. Where we tend to fall short is on what happens next.

Recruitment isn't recruitment until a supporter's name and contact information is safely stored in your database. When you get someone's phone number at a party,

...our [political staffer] interviewees were unanimous in their assessment that fewer contacts representing a higher level of commitment from each constituent are more powerful than large numbers of contacts that represent nothing more than a click."

—Shayna Englin

13 This paper does not take up the critical need for values-based messaging and for a storytelling approach to communications—much is already available on these topics.

you might write it down on your hand, but you better get those digits into your address book, or you're not going to be able to ask for a date.

Abigail Doerr from Washington Bus told us about her biggest recruitment regret: losing several entire events' worth of sign-in sheets before entering the data. Maybe a name needs to be transferred from a sheet of paper or from a spreadsheet, or perhaps your online petition automatically feeds into your CRM database, but either way you need to know how this will happen and put somebody in charge of ensuring that it does, and quickly. The more you can do this electronically, even at events, the better.

Mobilization: Breaking Out The Power Tools

Now your engagement and mobilization plan kicks in—you need to be back in touch with your new supporters quickly, both to thank them and then to give them progressively higher bar opportunities to plug in. The longer you wait, the less likely they are to engage.

Mobilization is one of those words that can mean whatever you want it to mean. Here's what we think it means. Mobilized people are actively investing time, energy and resources in taking civic action that helps drive your campaign forward. Signing up for an email list is not mobilization. (That's recruitment.) Neither is signing a petition. (Ditto.) A one-time $10 donor is not necessarily mobilized. (A repeat donor, perhaps.)

Mobilized people are people that you can engage in a series of increasingly intensive or high-commitment actions that build your campaign's power. For example, people getting onboard Washington Bus' actual bus to ring doorbells in support of marriage equality are mobilized—especially if they go more than once.

The ultimate goal of mobilization is people who feel a strong sense of commitment to and ownership of your campaign. Highly mobilized people will find creative new ways to contribute and lead, like the Dogwood volunteer who created the "This Is Not An Enbridge Animation" viral video.[14]

Washington Bus begins with a low-bar recruitment conversation with young people asking them whether their voter registration is up to date, but as soon as that business is concluded the person is offered the opportunity to plug into a campaign. Once a month the organization puts on a fun "welcome wagon" evening in their office with beer and snacks. Oh, and attendees are also given three stickers to place on a volunteer sign up wall against activities they are attracted to.

14 http://dogwoodinitiative.org/blog/not-an-enbridge-animation

One thing we've noticed is that, unlike many political campaigners and community organizers who have figured this out, advocacy organizations don't use the phone enough, either for fundraising or for mobilizing. We want to get to the necessary face-to-face interactions with supporters, but getting there from a purely online relationship isn't easy. Using the phone within a week of recruitment is a relatively inexpensive and effective bridge to get there, and valuable in itself both for raising money and for activating people at key moments. Modern phone tools also make it possible to ask people questions and collect instant feedback—a great way to "listen at scale." All of this information can and should flow back into your CRM database to build your base of information about your supporters.

Robocalls made to a targeted segment of the public are cheap, but annoying. Washington Bus, though, has had good success reducing hang-ups by making them funny. Telephone town halls are now relatively inexpensive and are a good way for supporters to deepen engagement, particularly when you can offer value on the call, such as relevant experts, decision makers, or celebrities. In addition, texting can be an inexpensive, medium-touch way both to send and receive information, especially for younger supporters.

It's time for the next evolution in software and software-as-service, and providers working with advocacy organizations to bake in processes that drive more effective advocacy.

—Shayna Englin

Fuse Washington will quickly follow up with a person who has taken an online action by calling them to thank them and to ask whether they might like to attend a local movie screening. This is a simple and quick escalation from low-touch to high-touch communication: from online to phone to face-to-face. Only a proportion will come along for the whole ride, but done repeatedly, the numbers begin to add up to an army of more passionate supporters who will help at big moments.

The phone is also one of the most cost-effective ways to turn your supporters into donors. Some groups do this in-house, setting aside concerted blocks of time for staff and volunteers to ask for monthly donations. Other groups contract this out to call centers. This pitching should, of course, be part of an integrated plan for supporters, rather than Campaign department handing names over to Development department, never to be seen again.

Mobilization begins to turn into real leverage when your supporters help you deploy political power tools at scale when it matters, and without breaking your budget. For example, you have developed enough engaged volunteers to run a phone bank, or to go out canvassing. Washington Bus' office has a stage for bands to play during parties, but can also be turned into a phone bank at the right moments. Their converted Greyhound bus also delivers canvass teams into targeted neighborhoods during campaign season, and this is possible because they've invested heavily in their volunteers along the way.

Alternatively, you may now have credible supporters in key political districts who will go and meet with their elected officials. These are the kinds of activities that get the attention of decision makers and hold them accountable, by speaking to their constituents at scale, and speaking to them directly in ways that command respect.

Each organization should define for itself the lines that separate the various levels of the pyramid—when a person graduates from one level to the next. Perhaps a supporter has taken online action consistently. Perhaps he or she has donated once, or five times. Perhaps he or she has turned out in person to something, or met with their elected decision maker. These activities draw people up the pyramid, where levels can be defined and where a person's engagement can be measured and given a value that is then recorded in the database.

Montana Conservation Voters has defined an engagement pyramid with six levels, and now has supporters in all six levels. People at level five are "owning" the mission, and people at level six are "leading" activities for the organization. Senior staff identify supporters belonging to these uppermost levels using more qualitative measurements.

Movements aren't built on individual people—they are built on relationships.

—Jackie Bray
Obama 2008 Ohio Field Director

Distributed Organizing: Going Big

In May 2011 the staff at the Dogwood Initiative was exhausted. They had just run a successful voter education campaign in a political district in the federal election, but their staff had worked flat-out for weeks on end. They realized that if they were going to have influence beyond just one place, then they had to move from such staff-driven campaigns to something else.

The top of the pyramid is a place where an organization can harness the power of a distributed, organized and motivated volunteer network, at least during critical pushes. The pillars of distributed organizing are the leaders or super-volunteers who themselves then lead teams of other supporters, with paid staff and systems dedicated to assisting and holding it all together.

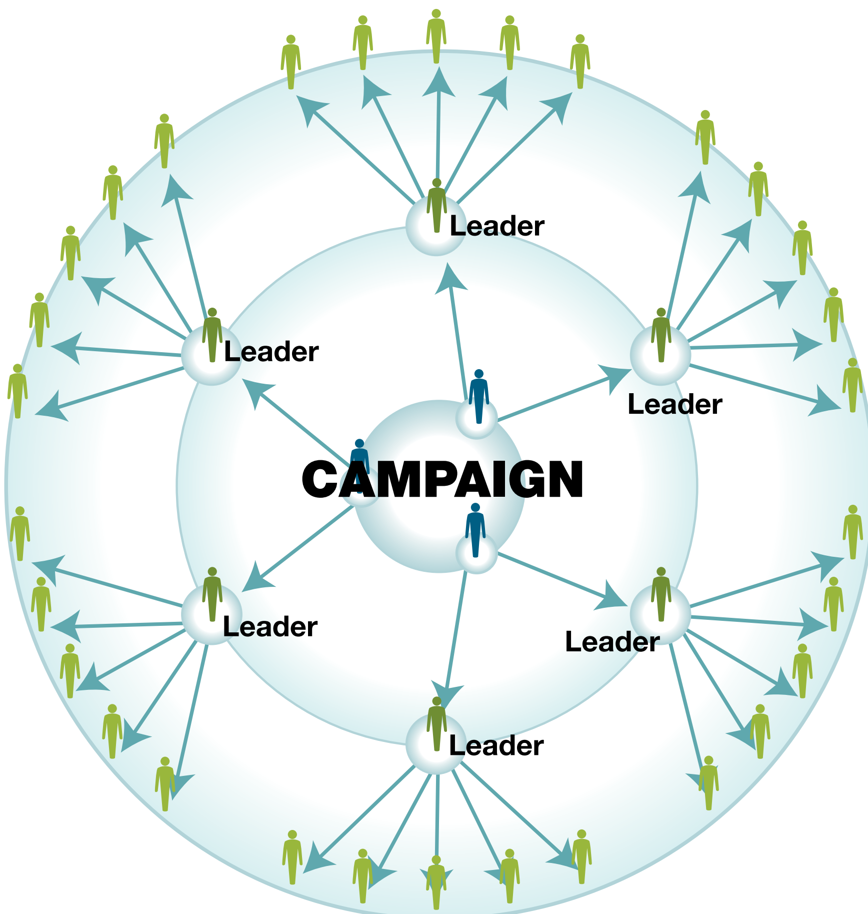
Dogwood answered with its Finding Allies program, sending out kits for an issue campaign to people who commit to a certain number of hours, and also calling them up to offer assistance and to invite them to a barbecue so that they meet one another and share experiences. By doing all of this, Dogwood is identifying and training super-volunteers in key geographies who will allow it to run campaigns far bigger than its small staff could handle by itself.[15]

Perhaps the most successful distributed organizing effort to date took place within the 2008 Obama campaign, and advocacy groups can glean many lessons from Zack Exley's account.[16] Important is one of his conclusions that other attempts

15 See Brafman and Beckstorm's The Starfish and the Spider for much more on the power of distributed organizations. http://www.starfishandspider.com.
16 http://www.huffingtonpost.com/zack-exley/the-new-organizers-part-1_b_132782.html

at distributed organizing "failed because they were either so 'top-down' and/or poorly-managed that they choked volunteer leadership and enthusiasm; or because they were so dogmatically fixated on pure peer-to-peer or 'bottom-up' organizing that they rejected basic management, accountability and planning."

Exley also focuses on the critical need for in-depth training for volunteer team leaders. The Obama 2008 campaign didn't just give two-hour training sessions, but fullweekend sessions where team leaders were brought into the big picture strategy as well as given nuts-and-bolts skills and the ability to do training themselves, thereby fully empowering them to be able to then go run their own show. The trainings, and the execution were run around the mantra of "Respect. Empower. Include." that was drilled into everyone at all levels.



Distributed organizing relies on the building of super-volunteers or leaders who will in turn lead teams of other volunteers. It lets you go bigger at key moments. Image adapted from the New Organizing Institute's *Campaining to Engage and Win.*

CRM tools have advanced considerably over the past few years, but there is more to be done. We believe that distributed organizing calls for the next frontier of technology development—smart, lightweight, easy-to-use tools for distributed networks of organizers that give them specialized access to the database (such as names of supporters in a certain geographic area), a set of clearly-scoped activities, and tools for recording results back into the master database. Since these tools are being used by non-professionals with minimal training, they need to be streamlined and user-friendly. We're starting to see some of these tools in the 2012 U.S. presidential campaigns, but much work remains to re-purpose them for wider use.

A barrier for many organizations in getting to distributed organizing is that it does involve a certain letting go of central control, trusting your supporters and living with some brand risk and messiness in order to gain more leverage. This will raise challenging questions to which there are no clear-cut "right" answers: do you allow your supporters to develop strategy and tactics? What if they want to do tactics that you believe are counterproductive? Do you let people fail in critical campaigns? You need to find a balance between risk and reward, where you are minimizing the former through things like training, and maximizing the latter by adding significantly to your capacity.

In the middle of a good organizing campaign, volunteers will stop and tell you that they are becoming better people.

—Zack Exley

Some might equate distributed organizing with the chapter-based model that some organizations already have. In some respects this is correct, but there are also some potential differences rooted in form vs. function. A chapter brings a governance structure (form) to a local place and to a set of people—the structure can live beyond any one event. Distributed organizing, in contrast, allows for the rapid coalescing of volunteer leaders and volunteers around a particular campaign (function), with that grouping perhaps then fading back into the woodwork when the push is over.

This is not to say that chapters can't be instruments of distributed organizing with the right systems and practices, and indeed there may be some value-added such as the greater local credibility that comes with a consistent local presence, or the assigning of roles or titles to super-volunteers to encourage engagement. But, care must be taken to avoid the silo effect that often comes with chapters, recreating the kinds of functional barriers we saw above in the discussion on organizational culture and structure. Chapters should be nodes in a network, rather than mini-fiefdoms.

Even Pharaohs Need Gold

How do you pay for all this pyramid building? A fundamental aspect of engagement organizing is the opportunity, and some would say the necessity, of aligning your theory of change with your financial model. That is, that same set of people who will help push an issue or a decision maker will also fund the effort through donating. Indeed, this is a practical feedback loop to let an organization know whether it's resonating with its supporters.

It takes a new attitude to do this, though, one that shifts away from the traditional direct mail model. As Rick Johnson in Idaho says: "This is anathema to many development folks, but our new job is to talk to anyone who wants to be communicated with, regardless of whether they are giving us money. We're going to figure out how to move them into donors, activists, and deeper engagement from there."

Few have yet achieved this, but in theory there is a steady state, a point where an organization can build a perpetual motion machine, relying solely on its own supporters. This can be achieved through the magic of monthly donors.

In early 2012, Dogwood Initiative passed the point of having 100,000 people on its list, and Executive Director Will Horter believes that, because of Dogwood's improving processes for moving from recruitment to mobilization, these people are strongly motivated, manifested through much higher-than-average email open rates and online action completions. Horter believes that Dogwood can use the phone to convert three percent of its supporter list to $15 per month donors, which, if successful would yield an annual budget of $540,000, about the same as Dogwood's overall core staff expenses today.

There is a lesson here for groups working in rural locations, since it implies there might be a kind of carrying capacity based on the overall population of an area. A certain percentage of the general population will be interested enough to be on your list, and in turn a certain percentage of that list will be keen enough to become monthly donors, so your mission and geographic scope needs to be relevant to a large enough overall population to support your planned budget, unless you plan to rely on outside funding. For urban or suburban groups, though, the pool of potentially engaged people is potentially quite large. We think the opportunity is there, waiting to be seized.

IV: The End

Rick Johnson sees his organization grappling with the real challenges of moving towards an engagement organizing model, but knows it's worth it. "I just saw a guy in a coffee shop wearing a t-shirt that said 'Do Epic Shit.' This isn't an incremental thing. It is when we are doing the most ambitious and aspirational things that we usually succeed and have a blast. I'm certain this is one of those times." So are we.

Some Recommendations

1 If you are in a new or small organization wanting to do engagement organizing, the good news is that you have the opportunity to build the necessary culture and organizational structure from scratch. Spend the extra time and energy to hire those who embrace the model, but also know that you don't need to build as large of an organization if you're systematically pushing more of the action out to volunteers. The bad news is that the technical side may be harder for you–wielding good tools requires money and time–so don't lowball your budgets and time spent on this. A tip, though: major donors who are successful entrepreneurs often have a visceral understanding of the importance of strong systems, and many would love to fund this stuff for you–if you ask.

2 If you are in a mid-sized or larger organization or an organization with a history, your biggest challenge may be teaching new tricks to an old dog, particularly if things are feeling comfortable right now. Your existing staff may want to change the world, but not everyone wants to or is able to embrace the kind of work described in this paper. Don't shy away from making staff changes if you need to. For those who stay, it's critical to involve all of them in a robust conversation about both the Why and the What of changing direction so that the details of the How are embraced rather than resented. Don't skimp on tools upgrades, but don't do this in isolation of the cultural and structural stuff.

3 If you are already successfully doing engagement organizing, link up with others who are too and tell stories. Test, measure, and share your results. It's better to learn from the relevant mistakes of others, freeing you to explore new directions rather than spending your own time and money failing. Challenge yourself to reach the stage of distributed organizing, and have the courage to 'let go' to make that work. Experiment and take risks.

Most power occurs because one side is better organized than the other.

—Seth Godin

4 If you are a funder, ask for robust measurement and reporting on engagement activities, and reward those doing it well with multi-year general support funding to execute and innovate, rather than narrower annual program funding. Consider making fewer, bigger bets and spend more time ensuring their success. Fund things that help organizations develop a funding base that isn't you. Bring your grantees together to talk openly about not just success, but also failure. Reward political savvy even if you can't reward political activities.

5 Be epic.

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