



# OFA TRAINING

Welcome to today's webinar.  
We will begin shortly.

For audio, please make sure  
to also join the call.

Dial-in here

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License.  
To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to  
Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.

# LOGISTICS



We will meet for 90 minutes



This is an **interactive training**.  
You will work in pairs today.



A recording of this video and  
call will be available on the

Access bookshelf



It's cool if you Tweet --  
**#OFA**Fellows

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License.  
To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to  
Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.





# CREATING CAPACITY

W/ JENNIFER WARNER

## GOALS FOR TODAY

Understand what organizing model  
is most effective and efficient for  
your campaign needs and goals.

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License.  
To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to  
Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



## GOALS FOR TODAY

Be able to assign campaign goals  
based on your target universe and  
organizing model

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License.  
To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to  
Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



## GOALS FOR TODAY

Feel confident assessing  
performance as measured by goals  
to manage your program.

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License.  
To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to  
Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.





Agenda for today

Overview

Types of Organizing Models

Setting Goals

Managing Your Organizing Model

Debrief and Close

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



# Expected Turnout

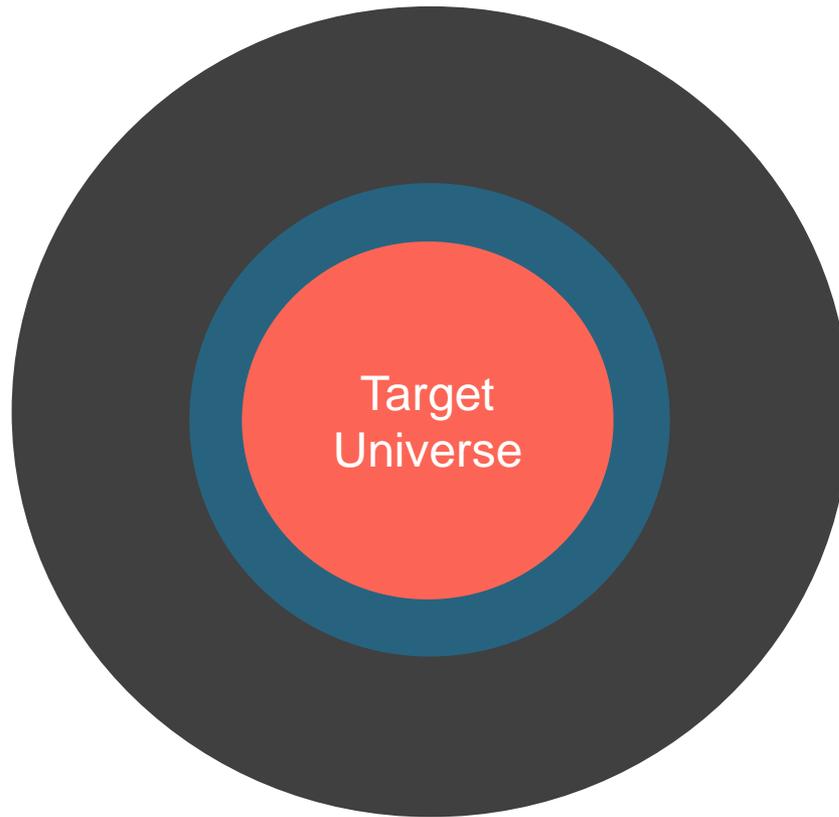
This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.





This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.





This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.





**YOUR QUESTIONS:** Jose del Rio



**Where do we get more information to narrow our target universe?**

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.





## YOUR QUESTIONS: Jose del Rio



**Where do we get more information to narrow our target universe?**

- Budget and staff size plays a key role in this decision
- Volunteer capacity also helps – the more people you have, the more people you can reach in your target universe
- An organizing model that helps you get the most people can help

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.





## Your Turn!



Experiential Activity #1

5 Minutes

**Working in teams, determine which communities, leaders, groups can help you build the capacity you need to hit your target universe goal. Explain the role of each “actor,” and be as specific as possible.**

Open workbook

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.





# Your Turn!



## DEBRIEF



Press 1 on the phone

OR



Type in chat box

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.





## Agenda for today

Overview

Types of Organizing Models

Setting Goals

Managing Your Organizing Model

Debrief and Close

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.





**What organizing models have you used in the past? Explain their pros and cons.**



Press 1 on the phone

OR



Type in chat box

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



**YOUR QUESTIONS: Shivanna Harridan**



**How do you make the target universe an achievable goal?**

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



## YOUR QUESTIONS: Shivanna Harridan



### How do you make the target universe an achievable goal?

- If your goal is talk to everyone in your target universe multiple times based on their tier, you can use your organizing model to distribute the goals among as many organizers and/or volunteers as you can.

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



## SCENARIO 1

Representative Charlie Dent of Pennsylvania is undecided on supporting a comprehensive immigration reform. Dent represents a moderate district with an important immigrant population.

**What organizing model can you use to mobilize his constituents to pressure him to support immigration reform?**



Press 1 on the phone

OR



Type in chat box

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



## SCENARIO 2

Your goal is to turn out 150,000 people to vote for a Marriage Equality ballot initiative in Rhode Island.

**What organizing model can you use to reach out to all 150,000 voters in your target universe multiple times?**



Press 1 on the phone

OR



Type in chat box

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



Scenario  
1

Scenario  
2

Whether you are running an issue campaign, or an electoral issue campaign, you need an organizing model that helps you reach out to the people in your target universe effectively and efficiently.

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



## TYPES OF ORGANIZING MODELS

Paid Canvass

More staff needed, which limits volunteer capacity

Volunteer Model

No or limited community stakeholders

Team Model

High turnover

Some paid canvass models are more engaging than others

Useful for short term, less exciting races or issues

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



## TYPES OF ORGANIZING MODELS

Paid Canvass

Volunteers complete tasks

Volunteer Model

Volunteers are not empowered w/ leadership roles

Team Model

Staff does not focus on volunteer capacity

Useful if there is significant lack of volunteers

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



## TYPES OF ORGANIZING MODELS

Paid Canvass

Staff empowers volunteers to run the program

Volunteer Model

Focus on locals who can function as messengers

**Team Model**

Volunteers are more likely to feel engaged and return to help

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



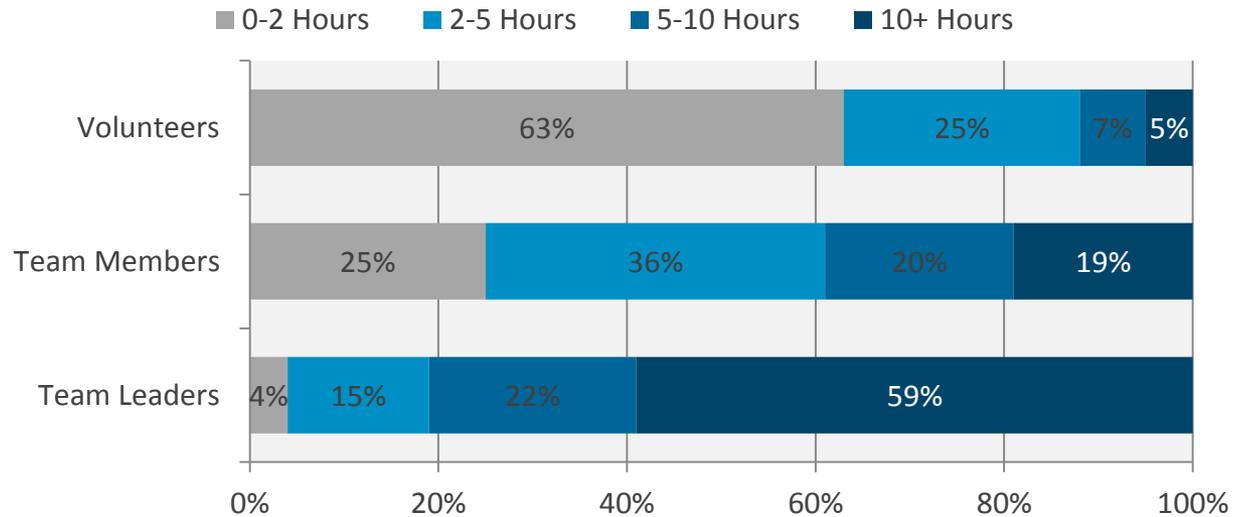
## TYPES OF ORGANIZING MODELS

Paid Canvass

Volunteer Model

Team Model

Volunteer Hours per Week by Role



**Volunteers organized in teams dedicate more time to the campaign!**

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



## TYPES OF ORGANIZING MODELS

Paid Canvass

Staff empowers volunteers to run the program

Volunteer Model

Focus on locals who can function as messengers

**Team Model**

Volunteers are more likely to feel engaged and return to help

Better recruitment - neighbors talking to neighbors

Reaches more people in target universe

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



## TYPES OF ORGANIZING MODELS

Paid Canvass

Volunteer Model

Team Model

**1 Organizer = 200 Phone Attempts Daily**

**1 Organizer = 3 Teams of 5 Volunteers Each**

**15 Volunteers = 3,000 attempts in a day**

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



## TYPES OF ORGANIZING MODELS

Paid Canvass

More investment on the front-end

Volunteer Model

Typically requires supplemental programs in areas where it's harder to find and train volunteers

Team Model

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.





## Your Turn!



Experiential Activity #2  
10 Minutes

- 1 Choose an organizing model from the campaign you outlined on Assignment 1**
- 2 Explain your rationale for your organizing model**
- 3 Determine what metrics/goals you would give your staff and/or volunteers to hit your target universe using the model you selected**

Open workbook

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.





# Your Turn!



## DEBRIEF



Press 1 on the phone

OR



Type in chat box

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.





## Agenda for today

Overview

Types of Organizing Models

Setting Goals

Managing Your Organizing Model

Debrief and Close

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



## YOUR QUESTIONS: Francesca Austin



What organizing activities will help us reach our target universe?

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



## YOUR QUESTIONS: Francesca Austin



### What organizing activities will help us reach our target universe?

- Whatever activities you choose to incorporate into your organizing model, they should always help you build the type of relationships you need to (1) grow capacity and (2) talk to voters

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



## TEAM MODEL PHASES

Phase 1

Phase 2

Phase 3

Phase 4

Building Relationships

April - June

**1:1 Meetings:** Start with as many 1:1s as possible to build relationships.

**Recruitment:** Identify supporters and potential volunteers -  
How can I plug you in?

**House Meetings:** Build relationships with people who could become team members and work together to talk to voters.

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



## TEAM MODEL PHASES

Phase 1

Phase 2

Phase 3

Phase 4

### Voter Contact and Capacity Building

May - September

Continue recruiting volunteers and building capacity to do voter contact.

**Phone Banks:** Volunteer recruitment to do voter contact.

**Canvasses:** Voter contact - ID and Persuasion

**Voter Registration:** Expand target universe

**Pledge Cards:** Expand or contact target universe; identify volunteer prospects

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



## TEAM MODEL PHASES

Phase 1

Phase 2

Phase 3

Phase 4

### Leadership Testing and Confirmation

May - September

As volunteers start to run events, organizers can test and confirm them.

**Leadership Test:** How well can the volunteer handle certain responsibilities

**Leadership Confirmation:** After two tests, volunteers who demonstrate they can handle responsibilities on their own, are asked to fill leadership roles both prior to and on Election Day.

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



## TEAM MODEL PHASES

Phase 1

Phase 2

Phase 3

Phase 4

GOTV PREP AND GOTV

September - November

Focus on turning out voters.

**Staging Locations:** Start looking and locking E-Day staging locations.

**Staging Location Directors:** Confirm leaders who can run SLs on E-Day.

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.





## Agenda for today

Overview

Types of Organizing Models

Setting Goals

Managing Your Organizing Model

Debrief and Close

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.





## Your Turn!



Experiential Activity #3  
15 Minutes

- 1 Individually, review the scenarios**
- 2 Determine your management approach given the phase of the campaign in which the situation is happening**

Open workbook

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.





# Your Turn!



## DEBRIEF



Press 1 on the phone

OR



Type in chat box

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.





Agenda for today

Overview

Types of Organizing Models

Setting Goals

Managing Your Organizing Model

Debrief and Close

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.





## What was your biggest “aha” moment?

---



Press 1 on the phone

OR



Type in chat box

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.





NOVEMBER 3<sup>RD</sup>

# BUILDING A RAMP AND TIMELINE

W/ DANNY LUCIO

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.



# OFA TRAINING

Thank you for joining today's webinar.

Find the materials we covered, including a video and audio recording of the webinar, on the bookshelf.

See bookshelf

This work is licensed under the Creative Commons Attribution-Non Commercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.