



## NETCHANGE TRAININGS

# Six building blocks of distributed organizing campaigns

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This worksheet breaks down the six strategic elements and practices behind most successful distributed organizing campaigns. We arrived at this list by drawing on our own experiences as campaigners and through conversations with folks leading today's high-profile distributed advocacy networks across the world. This tool is designed to convey the basics and to lead you and your teams to design or optimize your own practices by checking them against those of other leaders.

# Block 1: Establishing a people-powered Theory of Change (TOC)

Organizations that have launched successful distributed organizing campaigns have established messaging and campaign framing that makes it clear that supporters are the key players in their efforts and that people power is absolutely essential for campaign success. In other words, the campaign needs supporters to step up and become heroes! This is more than a messaging issue. It involves thinking of a people-powered strategy as core to campaign design and the overall Theory of Change. It also involves making that Theory of Change clear to everyone from their first experience of the campaign.

## WHO'S GOOD AT THIS?



[Bernie Sanders campaign video made by volunteers to encourage other volunteers to join.](#)



[ACLU People Power home page](#)



[350.org about page](#)



[Stop Adani campaign website](#)

## WORKSHEET 1: ESTABLISHING A PEOPLE-POWERED TOC

The following are questions you can ask to design or optimize your own approach to this.

Questions	Your campaign notes:
<b>Framing: Does your campaign framing make it clear that people power is crucial for the win?</b>	
<b>Framing: How can each supporter be a superhero in your campaign?</b>	
<b>Are you publicly displaying your people-powered Theory of Change to potential and existing supporters?</b>	

# Block 2: Designing supporter path and roles

As opposed to traditional staff-led campaigns, where supporter involvement is usually an afterthought - ie. “please share this thing we created” – campaigns that plan to make use of distributed organizing put the people-powered process at the center of campaign design. This means building out a campaign idea based on what central role supporters can play in the strategy and how this network of active supporters will be managed by the central campaign group. This also brings up the question of how much supporters will be expected to do autonomously and what kinds of decisions and responsibilities remain with the central (usually staff-led) campaign team.

## EXAMPLES:

The screenshot shows a sign-up form for ACLU People Power. The header includes the ACLU logo and the text 'PEOPLE POWER'. The main heading is 'Sign up to make calls for Amendment 4'. Below this is a paragraph explaining the importance of calling voters. The form fields include 'First name\*', 'Last name\*', 'Email address\*', 'ZIP Code\*', and 'Phone number\*'. A red 'SIGN UP' button is at the bottom. At the bottom of the form, there is a disclaimer: 'By completing this form, you are joining our People Power volunteer program and agreeing to receive emails, calls, or texts from the ACLU, its state affiliates, and their representatives about ways to take action and support the ACLU, as per our privacy policy. Contact us at info@peoplepower.org. Privacy Policy'.

**Balancing autonomy the 350 and Hollaback! way**

**Strategy, training and facilitation are all managed top-down by central staff**

- Framing the “action-worthy” cause and the approach to it
- Creating overall campaign strategy
- Planning collective actions that mobilize local groups
- Creating central communications for collective mobilization
- Creating a digital hub structure and digital action kits for local organizers
- Continually building capacity with local organizers
- Curating and mirroring local content back to the collective

**Local groups have tactical and creative freedom in the following areas**

- Local groups can self-activate
- Local group chapter leaders appoint themselves
- Local digital hubs can be customized to reflect local flavor
- Local groups are free to create their own messaging
- Local groups can devise and execute their own actions

ACLU’s People Power campaign offers concrete and accessible supporter actions

[Breakdown of central and supporter roles used by 350.org and Hollaback! In this Moblab article linked here](#)

## WHO’S GOOD AT THIS?

[350.org](#), [Hollaback!](#), [ACLU People Power](#), [Bernie Sanders campaign](#).

## WORKSHEET 2: DESIGNING SUPPORTER PATH AND ROLES

The following are questions you can ask to design or optimize your own approach to this.

Questions	Your campaign notes:
<b>Who are your people? Where will you recruit them from?</b>	
<b>What are your typical supporter's motivation levels and capacities?</b>	
<b>What can they do to help? (define a range of lower to higher barrier actions)</b>	
<b>What kinds of things can supporters do or decide independently in your campaign networks?</b>	

## Block 3: Establishing a recruitment and onboarding process

In a distributed campaign, supporter time and energy is your primary resource. This means that a good amount of planning should go into thinking of ways to recruit highly-engaged people from your base or from outside your existing networks. It also means that an onboarding process should be set up in advance to welcome new recruits, maintain their enthusiasm and transmit the basic knowledge and skills they will need to start actively participating in the campaign. This is a good time to plan out shared campaign values and a code of conduct so that new joiners will know what the campaigns' politics and culture are and will be much less likely to go off track and off message when acting on their own.

### EXAMPLES:



**Starting a Chapter**

The members of your Jolt chapter will organize around issues, get out the vote and, most importantly, have fun building an amazing Latino community.

3 Easy Steps To Start Your Jolt Chapter

- 1 Find 5 Latino friends.\*\*
- 2 Vote on leadership positions.
- 3 Register your group with Jolt.

**That's it – you're ready!**

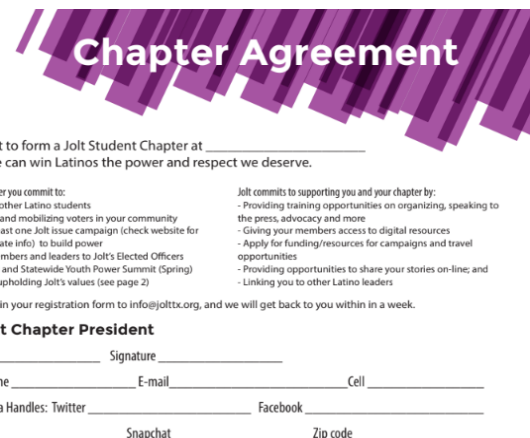
Submit a new chapter application to Jolt. Once you have your five friends and your leaders elected it's time to register your group with Jolt. Fill out the Jolt Chapter Agreement and e-mail to [info@jolttx.org](mailto:info@jolttx.org) and someone from the Jolt team will get back to you within a week.

Once you register, you have to formalize your group's communication by joining the Jolt Students Facebook Group.

Why join Jolt and start a chapter? Want to meet really cool people in your community? Want to educate yourself and find your voice? Want to be involved in fun events? Want to hold elected officials accountable? Want to make change? If you answered yes to any of these questions, Jolt is the place for you. Let Jolt help you create an amazing campaign to build a better future.

**Why must I live in Texas?**  
Jolt is focusing on mobilizing the voice of the Latino community in Texas specifically because it is where we can make the biggest difference politically. Texas is 40% Latino, but that is not reflected in the state's elected officials. We are focusing on building the political power of the Latino community in Texas so it can more accurately represent its population.

Got 5 Latino friends?



**Chapter Agreement**

Yes! I want to form a Jolt Student Chapter at \_\_\_\_\_ so that we can win Latinos the power and respect we deserve.

As a Jolt Chapter you commit to:

- Organizing other Latino students
- Registering and mobilizing voters in your community
- Picking at least one Jolt issue campaign (check website for most up-to-date info) to build power
- Sending members and leaders to Jolt's Elected Officers Summit (Fall) and Statewide Youth Power Summit (Spring)
- Commit to upholding Jolt's values (see page 2)

Jolt commits to supporting you and your chapter by:

- Providing training opportunities on organizing, speaking to the press, advocacy and more
- Giving your members access to digital resources
- Apply for funding/resources for campaigns and travel opportunities
- Providing opportunities to share your stories on-line; and
- Linking you to other Latino leaders

Please turn in your registration form to [info@jolttx.org](mailto:info@jolttx.org), and we will get back to you within a week.

**Student Chapter President**

Date \_\_\_\_\_ Signature \_\_\_\_\_

Printed Name \_\_\_\_\_ E-mail \_\_\_\_\_ Cell \_\_\_\_\_

Social Media Handles: Twitter \_\_\_\_\_ Facebook \_\_\_\_\_

Instagram \_\_\_\_\_ Snapchat \_\_\_\_\_ Zip code \_\_\_\_\_

[Jolt Texas](#) provides a chapter setup guide and requires signoff on a chapter values agreement

### WHO'S GOOD AT THIS?

[Jolt Texas](#), [Team Internet](#) (Free Press and others), [350.org](#), [Hollaback!](#), [Bernie Sanders campaign](#)

# WORKSHEET 3: ESTABLISHING A RECRUITMENT AND ONBOARDING PROCESS

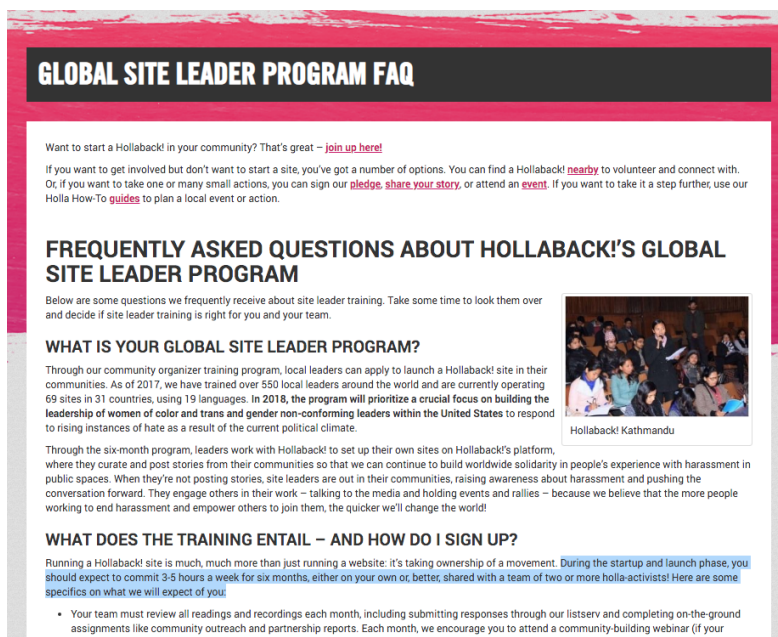
The following are questions you can ask to design or optimize your own approach to this.

Questions	Your campaign notes:
<b>What happens as soon as someone new signs up? (onboarding)</b>	
<b>What do orientation sessions look like?</b>	
<b>Do more experienced supporters mentor new recruits?</b>	
<b>Are you getting signoff on shared values/code of conduct?</b>	

## Block 4: Setting up coaching and support for distributed supporters

Time and time again, groups deploying distributed networks have found that a totally hands-off approach to their supporters is not helpful because movement ties and morale break down over time and people tend to drop off. Regular interactions and support are essential in distributed organizing, especially as the network grows. These interactions can happen between central staff and active supporters or between highly-engaged supporters acting as mentors to new joiners. For smooth running, training agendas and materials should be planned in advance and a regular schedule of group calls and check-ins, most often via videoconference, helps keep distributed networks grow and learn together.

### EXAMPLES:



The screenshot shows a webpage titled "GLOBAL SITE LEADER PROGRAM FAQ". It includes a link to "join up here" and a section titled "FREQUENTLY ASKED QUESTIONS ABOUT HOLLABACK!'S GLOBAL SITE LEADER PROGRAM". One question is "WHAT IS YOUR GLOBAL SITE LEADER PROGRAM?" with an answer that mentions training over 550 local leaders in 31 countries. Another question is "WHAT DOES THE TRAINING ENTAIL – AND HOW DO I SIGN UP?" with a bulleted list of requirements.

[Hollaback!](#) has set up a sophisticated training program for new chapter leaders

### WHO'S GOOD AT THIS?

[Team Internet](#) (Free Press and others), [350.org](#), [Hollaback!](#), [Bernie Sanders campaign](#)



# WORKSHEET 4: SETTING UP COACHING AND SUPPORT FOR DISTRIBUTED SUPPORTERS

The following are questions you can ask to design or optimize your own approach to this.

Questions	Your campaign notes:
<b>Do you have staff or supporters ready to take charge of this?</b>	
<b>Do you have a training plan, with materials ready for new recruits?</b>	
<b>Do you have a plan for regular coaching sessions or check-ins with your network?</b>	

# Block 5: Platforms and tools to support a distributed community

From what we see out there in the world, technology supporting distributed organizing efforts serves largely as a connective tissue between organizers and remote groups and participants. The innovators who have made such systems work for large organizations are certainly tech-savvy but not focused primarily on digital technology. Rather, they display a utilitarian approach to the platforms they work with, often choosing tools that are simple to adopt, affordable to own and already used by a large segment of their peers. If there is one common principle employed throughout the technological design of such programs, it is that the platforms and tools chosen must present the least friction when it comes to adoption and use by organizers and supporters.

## EXAMPLES:

### Distributed ‘tech stack’

The table presented here is a compilation of tools and platforms used by leading organizations that run distributed organizing systems including: The [ACLU’s People Power](#) program, [350.org](#), [Indivisible](#), [Movimiento Cosecha](#), the Bernie campaign, Canada’s [Dogwood](#) Initiative, [Sierra Club](#), [Hollaback!](#), Team Internet - [Free Press](#) and the [Stop Adani](#) network in Australia.

[\\*\\*\\*Full page pdf of this stack available here](#)

Function	Typical tools used
<b>Recruitment, getting names on lists through low-barrier digital actions</b>	Campaign CRMs with mailers like <a href="#">Action Network</a> / <a href="#">Nation Builder</a> etc., <a href="#">Mailchimp</a> , Facebook groups, Facebook Messenger, SMS short code systems like <a href="#">TextMarks</a> , sometimes paper to digital signup process at public events later transferred to digital spreadsheets
<b>Serving low-barrier digital actions / identifying high-action takers</b>	Hosted online petitions like <a href="#">ControlShiftLabs</a> , action tool suites like <a href="#">New/Mode</a> , built-in action tools within <a href="#">Nation Builder</a> / <a href="#">Action Network</a> etc., Peer to peer texting systems like <a href="#">Hustle</a> and <a href="#">Relay</a> , Phone-banking tools like <a href="#">CallHub</a>
<b>Campaign signup / sign-on</b>	Microsites either hosted independently or signup pages generated by <a href="#">Action Network</a> + <a href="#">Nation Builder</a> etc, <a href="#">Google forms</a> / spreadsheets
<b>Finding local actions</b>	Dynamic event or chapter maps, either generated by tools like <a href="#">Action Network</a> / <a href="#">Nation Builder</a> etc. or custom coded, Facebook Events
<b>Coaching, mentoring, checking in with supporters</b>	Videoconference software, most often <a href="#">Zoom</a> or <a href="#">Maestro conference</a>
<b>Internal informal comms / coordination within the network of supporters</b>	<a href="#">Slack</a> , WhatsApp, Facebook Groups
<b>Planning docs, timelines, managing events etc.</b>	<a href="#">Google docs / sheets</a> , <a href="#">Air Table</a> , <a href="#">Eventbrite</a> , Facebook Events
<b>Tracking + contacting larger groups of supporters</b>	CRMs with mailers like <a href="#">Action Network</a> / <a href="#">Nation Builder</a> (especially these two because they allow for distributed control), <a href="#">Mailchimp</a>

## WORKSHEET 5: PLATFORMS AND TOOLS TO SUPPORT A DISTRIBUTED COMMUNITY

The following are questions you can ask to design or optimize your own approach to this.

Questions	Your campaign notes:
<b>Are the tools you are choosing overall easy to adopt and to manage? (reduce friction)</b>	
<b>What tools/platforms will handle supporter recruitment and signup and maintain lists?</b>	
<b>What tools will handle onboarding and orientation?</b>	
<b>What tools will permit you to do rapid callouts to mobilize your supporter base?</b>	
<b>Do you have tools/platforms that permit collective creation and / or distributed management by supporters?</b>	

## Block 6: Defining the milestones + moments of a distributed campaign

A distributed network may contain many semi-autonomous groups that plan and lead their own activities some of the time but once in a while, it's important to align all groups around certain milestones or moments of truth. This can take the form of 'days of action' that synchronize activities from every group in the network at certain dates or some kind of collaborative project, where all groups contribute to a larger whole. These collective actions and projects are a powerful kind of glue that binds the network together over time. Just as important as planning and executing these actions and projects are opportunities to mirror back what the whole network is producing or achieving. Showing the diversity of the network, the multitude of voices it has mobilized and the collective power of the group is a powerful engagement driver that can also give the network shared purpose after peaks of campaigning activities have passed.

### EXAMPLES:



Internet users from across the globe have come together to create a crowdsourced vision for free expression online. Over 300,000 people from 155 countries worldwide helped shape our roadmap for a Digital Future that includes us all.



Open Media's [crowdsourced policy project](#)

### WHO'S GOOD AT THIS?

[Open Media](#), [Support. Don't Punish campaign](#), [350.org](#), [Stop Adani campaign](#)

## WORKSHEET 6: DEFINING THE MILESTONES + MOMENTS OF A DISTRIBUTED CAMPAIGN

The following are questions you can ask to design or optimize your own approach to this.

Questions	Your campaign notes:
<b>What are your collective mobilization moments? (milestones)</b>	
<b>When do you mirror back the impact/collective voices of the network so people can see what they have accomplished together?</b>	