Sample Organizing Plan for a Team of Three

Leadership Structure

Functional Tasks (as described in [Organizing Your Sister District Leadership Team](#)):

Email Editor	Misty
Welcome Wagon	Misty
Mobilize	Brock
Fundraising Lead	Brock
Phonebank Lead	Ash
Postcard Lead	Ash
Texting	Misty

Goals for the Year

Qualitative:
1. Recruit more volunteer leaders to join leadership team and solidify roles and responsibilities clearly
2. Build out volunteer team

Quantitative:
1. Fundraising: $5,000
   - State Bridges: $1,500
   - Candidates: $3,000
   - HQ: $500
   - Generally 1 project/month
   - Heavy focus on friendraising from own networks and gathering matching dollars
2. Phonebanking: 42,000 dials/140 shifts
   - Starting in May, 1 weekly recurring weekday or weekend phonebank
   - Starting up for October, 1 weekly recurring weekend phonebank and 1 weekly recurring weekday phonebank
3. Postcards: 500

Fundraising

January and February we will focus on raising funds for Sister District HQ. March through July, we will focus on State Bridges and candidate Early Money to "help our candidates build winning campaigns". We have frontloaded a majority of our fundraising for the cycle, aiming to raise $2,000 in this phase. From August through October, we will be working to "help our campaigns build Winning GOTV Programs" with a final $1,000 raised.

Month	Fundraising Event/Project	Amount Raised
Jan-Feb	Sister District HQ - Each leader will send a friendraising email to their networks to explain why Sister District is an organization worth investing in. - Highlight Sister District's political strategy and long term grassroots support.	$500
March	State Bridges - Email invites for March State Bridges event - Send text to invite folks 2 weeks before with ActBlue link to donate via text - Send text reminder 2 days before event with ActBlue link to donate via text	$1,500
Spring	24 hour Donation Blitz - Use this to introduce the candidate and promote first Meet the Candidate event - Email day before "gearing up", morning/afternoon of, day after with results - Texts sent late morning/midday Friendraising Email - Misty, Ash, Brock to reach out to friends/family and get pledges for matching dollars for first candidate fundraising event	$500 Candidates
Summer	Candidate Appearance Event #1 - Plan an in person house party with a virtual zoom appearance from your candidate - Make it fun! - Utilize matching dollars - Send Hustle texts to invite folks 2 weeks before - Email invite 3 weeks before, 1 week before, day of -	$1,000 Candidates

Fall	[Donor Resolicitation](#) - Reach out to donors who gave $50+ to commit for matching dollars for house party Candidate Appearance Event #2 - Plan an in person house party with a virtual zoom appearance from your candidate - Make it fun! - Utilize matching dollars - Send emails and texts to invite folks 2 weeks before House Party - Send reminder email/texts one week before Special Guest Event for GOTV feat. Staff - Email invite 3 weeks before, 1 week before, day of - Send Hustle texts 2 weeks before	$1,500 Candidates
TOTAL	5-8 fundraising pushes	$3,000 total

Phonebanking

Ash, our phonebanking leader, can run a 2 hour phonebank on a weekday evening or weekend morning. We will be adding a 2 hour weekday or weekend phonebank during GOTV. Training will focus on dial efficiency to increase dials throughout cycle. Check out the [Sister District Guide for Phonebank Leaders](#) for a full guide.

We will send phonebank invite texts through texts 5 times throughout the cycle.
We will include phonebank invite in general newsletter and phonebank specific throughout the cycle.

Ash will stay connected to SD Organizing Dept staff for any and all phonebanking-focused calls, trainings, materials.

To reach our goal of 42,000 dials/140 shifts, we planned the following with conservative estimates of what we can do at each phonebank.

Month	Phonebanks	Dials / Phonebank	Total Phonebanks	Total Dials
May	1 phonebank every week 5 attendees / phonebank Average of 1,400 dials per phonebank	1,400	4	5,600

June	1 phonebank every week 5 attendees / phonebank Average of 1,400 dials per phonebank	1,400	4	5,600
July	1 phonebank every week 5 attendees / phonebank Average of 1,400 dials per phonebank	1,400	4	5,600
August	1 phonebank every week 5 attendees / phonebank Average of 1,400 dials per phonebank	1,400	4	5,600
September	1 phonebank every week 5 attendees / phonebank Average of 1,400 dials per phonebank	1,400	4	5,600
October	1 phonebank on a weekday AND weekend 5 attendees / phonebank Average of 1,400 dials per phonebank	1,400	8	11,200
November/ GOTV	2 phonebank over final 4 days until election 5 attendees / phonebank Average of 1,400 dials per phonebank	1,400	2	2,800
TOTAL			30 total phonebanks	Estimated4 42,00

Postcarding

We estimate that we have the capacity to complete 500 postcard over the course of the cycle. We will run our program following the suggestions in both the [How to Guide: Postcarding](#) and [Tips from Sister District CA Peninsula's Postcarding Program](#).

Our Postcard Leader, Ash, will stay up-to-date on any postcarding opportunities and attend any postcard related HQ calls.

Email Editor

Misty will send:

2 General Newsletters per month which include:
- 3 topics of focus, one clear CTA and always contains the "can't make it, donate" ask
- Celebrate fundraising successes
- Celebrate phonebank and postcard volunteers following an action

3 Single issue newsletters as necessary each month for specific fundraising events or to recruit for the phonebank

Texting for Volunteer Recruitment

Misty will utilize Scale to Win texting to recruit volunteers for events.

We will send texts for every big fundraiser (6 events) and 5 times throughout the cycle for the phonebanking program. Your Organizing Staffer can train you on everything you need to know to successfully use Scale to Win texting.

Volunteer Recruitment and Engagement

Misty, Ash, and Brock will
- Co-host one community building event per month starting in March
    - This could be a volunteer orientation/interest meeting, a happy hour, coffee hour, etc.

Month	Event	Location
March	New Volunteer Orientation	Brock's home
April	Monthly Happy Hour	Local beer garden
May	New Volunteer Orientation	Brock's home
June	Monthly Happy Hour	Local beer garden
July	New Volunteer Orientation	Brock's home
August	Monthly Happy Hour	Local beer garden
September	New Volunteer Orientation	Brock's home
October	Monthly Happy Hour	Local beer garden
November	Volunteer Thank You Party!	Local beer garden

Template Organizing Plan

Goal: Mobilize volunteers through fundraising, phonebanking, postcarding, and other events to build community, support candidates and build progressive power.

Week 1-2: Kickoff & Team Building

1. **Volunteer Recruitment & Team Formation:**
   - **Action:** Reach out to existing supporters and recruit new volunteers through social media, email lists, and community outreach.
   - **Goal:** Form dedicated volunteer teams, assigning specific roles (canvassing, phone banking, events, etc.).
2. **Initial Team Meeting:**
   - **Date:** Week 1
   - **Agenda:**
     - Introduction to the campaign goals and timeline.
     - Overview of key roles for volunteers.
     - Assign initial tasks (phone bank shifts, canvassing routes).
     - Discuss the importance of fundraising and how to get involved.
   - **Location:** Virtual or in-person (e.g., someone's home, community center).

Week 3-4: Early Voter Engagement & Fundraising

1. **Phone Bank: Early Voter Outreach**
   - **Date:** Week 3
   - **Action:** Set up phone banking sessions to reach out to likely voters and introduce the candidate. Focus on building relationships and gathering support.
2. **Fundraising Event: Virtual or In-Person Campaign Fundraiser**
   - **Date:** Week 4
   - **Action:** Host a small fundraiser (virtual or at a local venue). Introduce the candidate, the race and its importance.
3. **Postcard Party:**
   - **Date:** Week 4
   - **Action:** Host a postcard writing party where volunteers write personalized messages to voters about the importance of voting and supporting the campaign.

Week 5-6: Expanding Outreach & Building Visibility

1. **Phone Bank: Voter Reminders & Engagement**
   - **Date:** Week 6
   - **Action:** Continue phone bank sessions focused on reminding voters about the importance of supporting the campaign and upcoming events.
2. **Team Meeting: Progress Check-In**
   - **Date:** Week 6
   - **Agenda:**
     - Review the results of canvassing, phone banking, and fundraising.
     - Address challenges and brainstorm solutions.
     - Update volunteers on upcoming events and new action items.

Week 7-8: Intensifying Voter Outreach & Fundraising Push

1. **Fundraising Event: House Party or Virtual Fundraiser**
   - **Date:** Week 8
   - **Action:** Host a house party fundraiser or virtual event with the candidate, featuring testimonials, campaign updates, and a fundraising pitch.
   - **Goal:** Meet or exceed fundraising goals for the final push.
2. **Postcard Party:**
   - **Date:** Week 8
   - **Action:** Hold another postcard-writing session with volunteers to send reminders and updates to voters. Include important election dates and how to vote information.

Week 9-10: Final Push & Get-Out-the-Vote (GOTV)

1. **Phone Bank: Get-Out-the-Vote (GOTV)**
   - **Date:** Week 9
   - **Action:** Focus all phone bank efforts on GOTV. Volunteers call likely supporters to remind them of the election date, encourage turnout, and provide voting information (polling locations, early voting options).
2. **Canvassing: Final Door Knock**
   - **Date:** Week 9
   - **Action:** Final door-to-door effort to connect with any undecided voters and remind supporters to vote.

3. **Team Meeting: Pre-Election Motivation**
    - ○ **Date:** Week 10
    - ○ **Agenda:**
        - ■ Motivate and energize the team for the final stretch.
        - ■ Discuss logistics for Election Day volunteering.
        - ■ Review GOTV plan and how volunteers can help on election day.
4. **Fundraising Event 3: Final Fundraising Push**
    - ○ **Date:** Week 10
    - ○ **Action:** Host a final fundraising event, aiming for a push to cover last-minute campaign expenses (ads, materials, etc.).
    - ○ **Goal:** Raise funds to secure the campaign's final push.

Week 11: Election Week — Final GOTV Effort

1. **Canvassing: Election Week Push**
    - ○ **Date:** Early Week 11
    - ○ **Action:** Organize a final canvassing event to remind voters to get to the polls. Use early voting data to target supporters who haven't voted yet.
2. **Phone Bank: Election Day Reminders**
    - ○ **Date:** Election Day (Week 11)
    - ○ **Action:** Final phone bank push for reminders to vote, offering support for transportation to polling stations if needed.
3. **Election Day Team Check-In & Support**
    - ○ **Action:** Ensure volunteers are prepared for Election Day duties (poll watching, transportation, etc.). Set up a communications channel (e.g., group chat) for updates.
    - ○ **Goal:** Keep everyone engaged and informed throughout Election Day.

Ongoing Tasks:

- **Social Media Engagement:** Encourage volunteers to share campaign materials and events on their personal social media channels.
- **Volunteer Recognition:** Regularly thank volunteers in meetings, via email, and on social media to maintain morale.
- **Data Tracking:** Ensure accurate tracking of volunteer hours, voter contact, and donations for follow-up and reporting.

This plan provides a roadmap to activate and maintain momentum for your grassroots volunteer team, ensuring consistent engagement, strong voter outreach, and effective fundraising throughout the campaign. Feel free to adjust the dates and specifics based on your team's schedule and campaign needs!