NDTC

Relational Organizing Toolkit

Our Toolkit

Thanks for downloading the NDTC **Relational Organizing Toolkit**! Your campaign, party, or organization is well on its way toward establishing a solid Relational Organizing Program.

This document will give you a rundown of the toolkit's contents and how to set it up for the use of your campaign, party, or organization. It will also walk through the optimal workflow when it comes time to get the ball rolling on **your** relational organizing program!

Table of Contents

Make a Copy of the Toolkit

If you haven't already, make sure that you copy over this toolkit to your own personal Drive:

1. Open the Relational Organizing Toolkit folder.
2. Click and drag your mouse over **all six files** to select them.
3. Right click, and select "Make a Copy."
4. Once the files have finished copying, click on **My Drive** from the left-hand sidebar menu.
5. You should now see all of five files from the toolkit in your personal Google Drive, as well as an **additional form** titled "Copy of R.O. Volunteer Resources Form." Create a new folder to house your toolkit's contents and share in the necessary folks from your campaign, party, or organization.

Toolkit Contents

Lead Organizer-Facing Resources:

- **Toolkit Instructions and Workflow Guide:** This is your basic instruction book on how to download, set up, and effectively implement the Relational Organizing Toolkit.
- **Volunteer Training and Relational Organizing Manager:** This is the spreadsheet managed exclusively by the volunteer or precinct captain(s) who will oversee the relational organizing program and train incoming volunteers. You will use this Google Sheets workbook to record volunteer information, track their training progress, and follow up on the progress they are making toward their goals.
- **R.O. Volunteer Resources Form:** This is a google form that you'll always want to send to volunteers entering your relational organizing program **before** their initial training. It will give them access to all of the

volunteer-facing resources from this toolkit, all of which will help them to achieve each of the four core relational organizing skills.

This form will also enable your volunteers to share their personal Friend & Family Trackers with you, the links to which will automatically populate into your R.O. manager for efficient oversight.

Volunteer-Facing Resources:

- **NDTC's Personal Network Map:** This PDF document will enable your volunteers to start brainstorming about the folks who occupy their different personal and professional networks **ahead** of being trained and using their Friend & Family Tracking sheet.
- **Friend & Family Tracker**: This spreadsheet will be the essential tool when it comes time for volunteers to use data to set and track their outreach goals. You should walk through this document **during** the initial training, and continue to reference them during your 1:1s in order to hold your volunteers accountable.
- **Supporter Conversation Guide:** This downloadable PDF offers some key points and considerations when it comes to having values-based conversations. You should make volunteers learn the importance of values based conversations **during** training, but this is a resource that they will be able to hold onto and reference when they start their own outreach.
- **(PDF) Friend & Family Tracker:** Sometimes you'll encounter volunteers who don't have the bandwidth (or the desire) for fully digitized data tracking, but that doesn't mean they can't help you build out your base. This printable version of the Friend & Family Tracker will enable low-bandwidth volunteers to keep track of their outreach goals; they can even bring their tracker with them during their scheduled 1-on1s to ensure the usual accountability measures.

Update Sharing and Automation Settings

Before fully implementing the toolkit, you'll need to take a few quick steps to set up your copies of the **R.O. Volunteer Resources Form** and the **Friend & Family**

Tracker. Completing these steps is necessary for proper communication between the Google form and your volunteers.

1. From your toolkit folder, open the **R.O. Volunteer Resources Form.** The form should open in a separate tab.
2. Update the text in section 1 of 3 with the name of your candidate, party, or organization
3. In section 2 of 3, you'll need to paste in the share links for each of the respective volunteer-facing resources.

Set up share links:

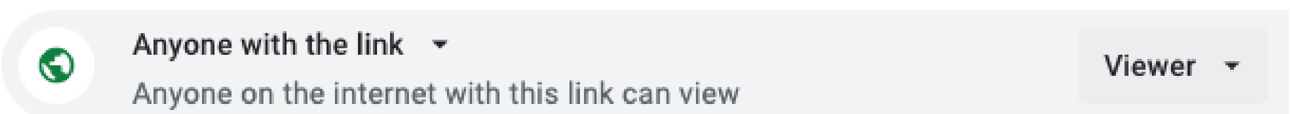
a. Navigate back to the Toolkit tab on your browser.

b. Select one of the volunteer-facing resources and right-click.

c. Select "Get link."

d. Click "Change to anyone with the link" at the bottom of the dialogue box that appears.

e. Ensure that anyone with the link is just a **viewer**, not an editor or commentor.



f. Click **Copy link.**

g. Switch back to the tab with your R.O. Resources From and paste the share link into the appropriate line of section 2.

h. Repeat this process for the remaining two resources.

You're all set! Your contact tracker and the respective google form are ready to be shared.

Workflow Guide: How to Implement Your Toolkit

Now that your share settings are properly updated, your toolkit is ready to support a solid relational organizing systems-design. This workflow guide will walk you through the optimal procedure for using this toolkit as the foundation of your relational organizing program.

1. Recruit and/or Take Stock of Your Volunteers

Whether you are recruiting new volunteers, or transitioning existing volunteers into a new relational organizing program, you'll want to take stock of their information on your **Volunteer Training and R.O. Manager**. You'll want to use the first sheet, the **Volunteer Masterlist**, when recording initial information.

Volunteer Masterlist		
First Name	Last Name	Pronouns

Columns to Note:

- **Resources?:** This column is meant to track who in your relational organizing program has received the **R.O. Volunteer Resources Form.** Remember, this form is how your volunteers will receive the volunteer-facing resources and how they will share their individual Friend & Family Trackers back with your campaign or organization.

- **Training Date:** If desired, you can record the date at which your volunteer will receive their initial training. We recommend grouping together volunteers in batches and giving them all the same training date. This way, you can be sure to send them the Resources Form at a set date (e.g. volunteers will be sent the form 3 days before their training).

- **Pre-Training Email Template:** If you scroll over to Column I, you'll see a starter template that you can use to email your volunteers ahead of their training session to guarantee that they get the Resources Form and other necessary information.

2. Train Your Volunteers

Remember, the goal of a full fledged relational organizing program is to develop your supporters into self-sufficient organizers. The more complex and integrated the tactics, the more important it is that you have a comprehensive training program for your volunteers.

Your initial training session should ensure that volunteers walk away able to meet the following learning objectives:

- **How to evaluate and document their social networks**

  Relational tactics depend on pre-existing social bonds. That means supporters need to be able to identify the folks to whom they are already connected in their daily lives.

  Ideally, your volunteers will have started to fill out the **Personal Network Mapping Template** before attending the training. If they haven't, encourage them to take a few minutes to brainstorm.

  Once your supporters have taken stock of their networks, reintroduce the **Friend & Family Tracker.** Your supporters should transfer the names they thought up to the first column of their trackers. Once they leave the training, your supporters should feel prepared to start reaching out to these folks.

- **How to engage others in values-based conversations**

  More systematized approaches to relational organizing train supporters to engage their personal networks in conversations about the issues that actually shape our lived experiences. These values-based conversations are the cornerstone of grassroots political action. It's **imperative** that you prepare your supporters to engage their networks in values-based conversations during their initial training.

  Your volunteers should have already been introduced to the Supporter Conversation Guide. Feel free to use this guide as part of your training, and make sure your supporters know that they can reference it at any time.

- **How to ask people in their networks to take action**

  Once your supporters start a values-based conversation, the goal is to end it with an ask! Use the same resources from the previous learning objective to drive this point home and prepare your volunteers to start making hard asks.

- **How to use data to set and track outreach goals**

  Finally, once your supporters have evaluated their networks and been prepared on engaging those folks in some values-based conversations, you'll want to make sure they understand the importance of using data to **track those conversations.**

  Circle back to the **Friend & Family Tracker** and explain how the "Escalation Outreach Goals" columns will allow your supporters to easily monitor the outcomes of their conversations and follow-up when necessary.

  Remind them that, if they haven't already, to use the google form to share their trackers with you, the volunteer or precinct captain. You'll want to be able to reference their progress when you begin to have your maintenance and accountability 1-on-1s.

3. Maintenance and Accountability 1:1s

Once supporters have successfully set goals and feel confident that they have the skills necessary to engage their networks, you'll start scheduling regular maintenance and accountability 1:1s with your supporters. During these 1-on-1s, you'll be able to follow up on their progress toward their outreach goals and help them address any roadblocks they might be facing.

You should use the **Maintenance and Accountability** sheet of your **Volunteer Training and R.O. Manager** to track the outcomes of your 1-on-1s. Remember, it's important for you to keep track of data as well, as the performance of your volunteers can inform future training opportunities and identify volunteer leaders who are ready to move up your campaign's or organization's ladder of engagement.

Maintenance and Accountability Tracker

Volunteer Name	Volunteer's R.O. Tracker

Columns to Note:

- **Volunteer Name and R.O. Tracker:** These columns will populate automatically when your volunteers submit their **Resources Form** responses.

  If you need to add in volunteers manually (e.g. low-bandwidth supporters who are using printable Friend & Family Tracker), there's a certain way it **must** be done:

  - ❏ Right-click on **row 6** and select "Insert 1 Above."
  - ❏ Add your new volunteer into the new, top-most row.

  Repeat this process **every time** you manually add a volunteer in order to ensure that the Google form continues to populate responses correctly.

4. Data Entry — A Continuous Improvement Cycle

In the same way that it's important for you volunteers to use data to keep track of their outreach goals, it's equally important that you as volunteer captain have a way to monitor this data as well.

Remember, relational organizing programs are sustained, multifaceted efforts, involving ongoing feedback, data management, and long term strategic planning. Understanding the performance of your R.O. program is a necessary step toward constantly improving it. Keeping an eye on the performance metrics of your supporters will also help you to identify folks who are ready for elevated responsibility and leadership positions.

You can use the Quick Look Metrics sheet of your **Volunteer Training and R.O. Manager** to keep track of how many volunteers are in your R.O. program, and how each of these volunteers are performing.

Quick Look Metrics		Use this sheet to quickly take stock of how many volunteers you have within your RO program. You'll also be able to see the total number of volutneers they have converted, the voters that they have secured, and how many conversations they have had to date.		
Number of Volunteers in your R.O. Program:	**0**			
Volunteer Name		**Total Number of Voters Secured?**	**Total Number of Conversations Had**	**Total Numbers of Volunteers Brought In?**

Like with the Maintenance and Accountability Tracker sheet, you may need to add volunteers manually here as well. The process is nearly identical, but involves a few extra steps:

- ❏ Right-click on **row 6** and select “Insert 1 Above.”
- ❏ Add your new volunteer into the new, top-most row.
- ❏ To ensure that your new volunteer’s metrics will update automatically, copy (ctrl+c) cells C6, D6, and E6 and paste (ctrl+v) into cells C5, D5, and E5.

Repeat this process **every time** you manually add a volunteer in order to ensure that their metrics update correctly.