

Know Your Neighbor Design + Log

July 22 2020 - Sept 1, 2020

Accountable: Nat



Caption: Overhead shot of six disabled people of color at a rooftop deck party. An Indigenous Two-Spirit person with a prosthetic leg smiles directly at the camera and gives a thumbs up while everyone else is engaged in conversation.

Attributed to Disabled And Here. When possible, please link back to the [Disabled And Here project page](#).

How might we get increased acquisition and activation from our 44K members?

How might we develop key member leaders into community organizers?

-- How might we work like a symphony across our internal departments to launch the neighborhood block captain program?

Rather than being a dinosaur in a rapidly changing environment, WACAN will transform and change across tech, organizing and leads teams.

If we train member leaders to text people in their own neighborhood then member leaders will have a leadership role and new members will be jazzed WACAN and the organizers will gain training and follow up skills.

- it will create a stronger affinity and get better results than texting w/out that neighborhood connection.
- it will become a viable alternative to door to door canvassing for membership growth and grassroots fundraising.

This worksheet is designed to help you design and track your experiment. Use it to collect and analyze your data as well as capture lessons learned and decisions made. Contact Alison <alin (at) changeelemental (dot) com> with questions or suggestions for improvement.

Original Strategy Memo concepts:

https://drive.google.com/file/d/1HrdDB89DjcdODCsBMuPaK9OR_iLiYx2/view?usp=sharing

Experiment Design

Note: What you write in these boxes will go into our online experiment dashboard.

Participants <i>Who is involved in the implementation of this experiment?</i>	Nat - WACAN experiment lead Dylan - Baselab consultant (6-8 hours / mo) Matt & Alison - Experiment support
TAGS <i>(org name, baselab/nsn, massbase/deepbase)</i>	Baselab, DeepBase, WACAN, organizers, leadership

High Level Experiment Plan

How will you test your hypothesis/assumptions?

What is the action or activities that you'll undertake to complete this experiment?

Please put more detailed plan below in Detailed Experiment Design

This method is a digital analog to the tried-and-true Block Captain/Neighborhood Team Leader/PCO model. WACAN would recruit and train members as Digital Block Captains (we can find a better name) who are in charge of a certain number (100-200?) voters with valid cell phones in their neighborhood.

We would give members a digital “turf” of nearby voters from the Voterfile, and assign them to cultivate relationships, and donations, from voters in their turf using an ongoing p2p text campaign. Rather than using p2p as a discrete “blast” about a particular event or ask, we could approach it as a conversation-starting/relationship-building tool, driven by members, with the end goal being a donation ask.

How will you **measure the success** of this experiment?

*What would success look like?
What would be a felt sense of success?*

What are the minimum standards of success?

What would failure look/feel like?

How will you collect the data or complete the analysis?

Activation:

- How many Digital Block Captains complete their initial batch of text outreach?
- How many positive responses do we generate?
- How many new members / donors do we generate?

Capacity Calculator:

https://docs.google.com/spreadsheets/d/1Vc_Wx4tVdb7ezlJXboEy6AcbCth4v9Z3d1cw40P5zho/edit#gid=0

Compare to results of more traditional Block Captains

Did we learn if this is a feasible replacement to membership canvas?

Organizers focus in on leadership development of member leaders and expand their capacity.

- it will create a stronger affinity and get better results than texting w/out that neighborhood connection.
- it will inform become a viable alternative to door to door canvassing for membership growth and grassroots fundraising.

Detailed Experiment Plan

What is the action or activities that you'll undertake to complete this experiment?

Include date benchmarks for each step and document the people responsible.

How will you collect the data or complete the analysis?

Example Content

1) Message 1: "Check-in." Hey, this is {{texter name}}; I live over on {{texter street}}

street. I'm a member of Washington Community Action network, a group of community members who work together to fight for our communities. I'm the block captain for our neighborhood, and I'm checking in on our neighbors to see how everyone's doing during this crisis. {{voter name}}, how are you and your family doing? Do you need anything?

2) Message 2: "Agitate." Hey {{voter name}}, this is {{texter name}} again. You doing ok this week? I wanted to let you know that we're working on a plan to allow renters to delay paying rent if they've lost their job, without fear of eviction or punishment from landlords. Do you think that's a good idea? How would that impact you?

3) Message 3: "Hard Ask." Hey {{voter name}}, this is {{texter name}}, your digital block captain with WACAN. We're ramping up our fight to allow out-of-work renters to delay paying until they're employed again. We need to set up a tool to allow people to call their legislators and tell them this is important, but it costs money. I know times are tough - but I was wondering if you could contribute \$5 a month to fund this work? You can sign up here: {donation link}

We could also consider using an affinity texting tool, like Outreach Circle, to allow WACAN members to quickly send these texts from their own cell number, rather than an impersonal, rented p2p number - might be a viable option.

Workflow:

<i>Participants</i>	<i>Activities</i>	<i>Inputs</i>	<i>Outputs</i>	<i>Outcomes</i>
<i>WACAN Staff</i>	<i>Recruit, Train, and Support Members</i>	<i>Develop Training curriculum, Develop Recruitment rap, Set up texting universes, monitor p2p</i>	<i>Trained Leaders</i>	<i>Ongoing Digital Block Captain program makes 1st touch with hundreds of voters in key neighborhoods</i>
<i>WACAN Members</i>	<i>Attend Block Captain Training training</i>	<i>Receive digital turf w/ 100 voters, training on p2p texting and being a block captain</i>	<i>Message 100 voters 3x, receive response from 20(?), donations from 3(?)</i>	<i>Ongoing relationship with donors, activists, and voters in neighborhood</i>

Tools needed:

- *P2P texting app (Relay, Hustle, Spoke) OR*
- *Relational Organizing app with affinity texting (Outreach Circle)*
- *Voter file*

Budget:

- *P2P: Send 3x outgoing messages to 5,000 voters, receive 1,500 messages back = 6,500 messages = \$325-\$520.*

- *Affinity: “ as above, + \$300/\$400 month for app*
- *Voter File: ? Depends on relationship with Win/Win or access from another source*

Training plan:

- P2P texting training for Organizers
 - Goal by second week of August for organizer trainers.
- Program overview training for Organizers
 - Goals, metrics, tasks, timeline
- Developing a training for organizers to deliver to volunteers
 - What is the follow through for those who express interest?
 - How are organizers staying in touch w/ leaders?

Data

Enter and store your feelings, experiences, observations and outcomes from your experiment here.

Analysis

Reflect on your experiment and the data above.

Initial Learnings and Insights

- Mary and Nat - rather than putting out to three regions, focus on one city where have a deep base, right size this for the first iteration. . ***Pivot to focus on Federal Way with one organizer.***
- Connecting data director to CIL
 - Solidified that as an org we have a disconnect between data system (eg where canvas data goes into but data isn't connected to organizers/program side) Lots of rich info in organizing not tracked at all is in the heads of organizers - but many organizers are new 1-2 years, no numbers or emails. Etc, Passive organizing. 5-6 years of organizing info that is not there . This meeting solidified that insight.
 - Getting basic info, name address, phone would be helpful from organizers. If there are community meetings, unless go into zoom and says who registered with zoom link and these 5 are in the meeting. ***We need a sign up and tracking!*** There hasn't been a system in place when Nat joined.

- Recognizing there are a lot of moving pieces in the experiment I could use help w/ need to tap into Dylan more on technical pieces. (ex setting up an API key). Different pieces I'm learning for the first time.

Member tags are able to create a lot with Civi(**what is the name of the system the canvas side is using?**)

Once get familiar with data systems can match to what system will serve WACAN best.

Review of Peer to Peer texting systems

- **Can use the P2P for fundraising**
- **Do another experiment iteration on canvas side for fundraising.**
- Annual member drive- something that staff and members can use. 44K members - that would be a massive event. Emailing might not be what makes most sense.
-

Turf and Data

- Need to gain higher clearance in voter file to append it with Harold's list.

ActionBuilder Demos --

https://actionsquared.zoom.us/webinar/register/WN_B43zvghoQ8qXRzbf4aVmrA

As go through TMC joining, could integrate with ActionBuilder.

Nat is running point and bottom lining and giving updates to organizer in Federal Way. Bring Ashley into next meetings for reflection.

Haven't started yet the script - **invite Ashely and Saul (field director) into the Baselab convo on developing the script**

Collaboration within the org is absolutely different, first time there is cross department communication that is necessary to move the experiment forward. Speechless. Opportunity to shine light on patterns and opportunities for change - open to growing. Run this way a very long time - and opening up possibilities for being different and more effective. (historic default, gear towards campus, retraining all muscles to support deepbase organizing- to get the muscle to move the other way is not automatic - appreciate this and commitment to working it out)

Debrief, Reflection, Learnings

*What were the most impactful 3-5 **lessons learned** from this experiment? Be concise!*

In order to right size the experiment, made a decision to focus on one neighborhood rather than 3.

We may consider the power of the P2P texting tool for our canvas team, including fundraising in a future iteration.

We need a basic way to collect data on our deepbase organizing.

This experiment reinforced the lack of data infrastructure within the organizing team over the past 5 plus years that the current Organizing team inherited.

This experiment has required cross department collaboration in historic ways, eg. data, organizing, canvas, comms teams.

This experiment is creating openings to shine light on patterns and opportunities for change and growth for more cross departmental collaboration and especially the organizing team.

*Record any **decisions made** during or upon finishing this experiment. For example, "We will now keep meeting notes for all of our internal and external meetings."*

*What **questions** do you have as a result of your experiment?*

Will you do another iteration of this experiment? (Yes/No)

Notes + Date

Aug 27 check in call

- Affirmed decision to test both OutVote and ThruText. Could be good for two options for staff and members to try out. And getting feedback from them on which was more user friendly.
 - Would be a kind of sub experiment within the experiment.
 - Next steps is Dylan is making the connections w/ OutVote and ThruText.
- Data next steps:
 - Connecting Dylan to Michael on their data team to look at the capacity for data work. Dylan can give a clearer perspective on what the needs will be. Will have that meeting next week.
 - Matt will loop in Harold and we will see if he or Matt can join that call next week.
- Was a Stable Homes initiative WACAN supported in Federal Way last year that generated a lot of good lists. → Unclear what specifically this list is. They did use Hustle a lot, Nat will follow up w / Mary on it.
- WACAN current data → Currently get access through an in state partner that gives access to other groups.
- Going to focus primarily on Federal Way for the initial testing. Then look at expanding to Seattle and other nearby areas.
- Training pieces:
 - Outvote as part of their package we'd get two specific trainings from them.
 - Not as clear yet for ThruText. But can work on that separate.
 - Will likely need a more detailed training to support the Organizers in getting started.
 - Because we're focused on Federal Way we'll be mainly working with Ashley, and she has in mind 2 leaders who she thinks will be likely involved.
 - Already has a community meeting in mind Sept where she plans to make an ask.
 - Each organizer can be a member leader in Federal Way so they can learn alongside the member leaders. Likely 6-7 people right now to get started.
- **Timeline:**
 - We will be set up pretty well to kick things off the week of Sept 21st.
 - Ashley community meeting the week of Sept 16.
 - Question about how and if we will incorporate any GOTV messaging if the experiment gets into October.

- But main focus will be specifically for base building and not just GOTV.
- Organizing vs Fundraising side of the experiment?
 - Currently there's not really someone driving this on the Fundraising side of the organization. So unsure that they're going to be part of this experiment right now.
 - Decision that we'll not include them and the fundraising team can pick it up after if interested.
- Budget:
 - Initial budget is \$9K (for now).
 - But now we're getting the grant that's likely expanded!
- What other support would be useful?
 - Support around the data questions and targeting has been and will continue to be support helpful.
 - Dylan has been super helpful and timely on making introductions.
 - Main focus for Nat is likely connecting the dots. + Matt looping in the TMC folks.
 - Getting things into a workplan.

Next Steps

- Matt will connect Harold w/ Dylan and Nat for the mobile number append convo.
- Nat will schedule call w/ Michael, Dylan + Harold to figure out data targeting and systems.

Aug 9

Nat updates:

- Brought it up for the WACAN leadership. Initial feedback from the team was they are super excited and it's something they could have implemented a while ago but are eager to build some structure around it.
- REally excited to hear there's some metrics and hard tangible metrics that organizers can use in their work.
 - Nat is personally excited about that the most as it'll give a clear director's role to manage the team. And be more directive w/ the team.
- Feedback from the organizers is there's some hesitation around setting the bar too low, most want to aim higher than just contacting a few hundred per week. They think they could go higher and would have more opportunities to organize. -> Good to hear as the initial worry was it could seem overwhelming.

- Played around w/ the metrics calculator as a resource for planning out how they're going to meet the goalposts.
- As a team Nat is working w/ each organizer to put together an action plan. And part of it will include the action item of planning out their part in this experiment. Still working on how to formally incorporate it into plans.
- Meeting w/ Dylan on 8/21 to talk through the P2P texting program and tools.

Alison -- thinking about how the TAMN organizing director built out a dashboard to collectively see all the metrics. Do you all have something you can use to track?

- Not at the moment, we'll be setting up the whole system. Need to get the data team to fully buy into the program. Not that they're opposed, but getting them to change workflows is hard.

Options for data:

- Build off calculator and add a reporting things.
- Example reporting workflow:
 - Leader sends texts, submits report to Organizer → Organizer fills out a daily/weekly reporting form → Form combines team metrics and makes them visible to the whole team.
- Will need to do some intentional work to build stronger relationships between organizing and data team. Could it be useful to have Matt (or Dylan) connect w/ the WACAN data team? → yes I think so. Right now I don't have a good sense on data things.
 - Could be a good way to incorporate CIL Grant and their support on this as well.
 - Organizing team will need to work w/ Data team to determine the criteria for lists to pull. Will need to

Nat to check in with Gina Owens about feedback on experiment

Organizers recruit Neighborhood leads. This is bigger than a shift, it is about messaging neighbors and being in conversation over a number of days, on your own time.

Nat to assign to Ashely : Conversation Tress/Preloaded messages (a series) - developed and then loaded into app. Want it simple for the volunteers to choose from it. People to be trained to also do edited messages to get more personal.

Develop Criteria for successful conversations

- Canvas team: Goal to get person signed up as member and donor
- Organizing Team : Goal to surface what issues care about and commit to being an activist.

Training for organizers on App

Create Slack Community - to answer questions + invite organizers + leads into it

Training for Leads on App

Data team creates lists + sends to specific organizer →

→ Organizers load assignments, then organizers assign assignments to a neighborhood lead
---> lead texts people through P2P app (sends 1st loaded text by pressing the button 500 times to send the 500 texts!)---> 24-72 hours -- lead completes convos via text (there are other preloaded texts to choose from).

Reports from App is about how many preloaded texts were sent/responded too (Y, M, N).

--- then after this the organizers will then follow up with specific folks, eg. people who want to do more around immigration and another who wants to learn about housing.

Organizers schedule a follow up debrief with each Neighborhood lead to debrief their conversations and their experiences.

July 2, 2020

Program side of staff - where the organizers lie and Nat's team. Looking at how we've learned how to organizer. Different wave length than canvas team. Eventually about canvas type work goal, not quite there, No tools for organizers to do job- like lists.

Canvas side of staff:

- In terms of our current member leaders -- all of them are directly impacted so all of their neighborhoods are diverse and directly impacted.
- For the Digital Block Captains -- do you want to also test it in a traditional fundraising upper class canvassing neighborhood? Could it also be used to test those issue alignment questions?
 - What team of folks will be involved? Organizing team driving it? Or other teams? Are there two sets of teams doing this w/ two different focuses?
 - Does doing two that are focused help more than doing one big one?
- Looking for deep base on scale! Want a big pool to start.

https://docs.google.com/spreadsheets/d/1Vc_Wx4tVdb7ezlJXboEy6AcBcth4v9Z3d1cw40P5zho/edit#gid=0

Apartment complex

1 member per 100 or 50

Set up for 1 per 10.

- Then from there 3 people who want to organize around something
-

How are organizers going to manage that level of people!!!!

Turf Size

- Precinct
- 5 miles
- Larger turf is more learning.

Audience for each of the Turfs

Training Materials are We giving to member leaders?

- What kind of training for organizers need to train member leaders?
 - Peer to Peer texting
 - Organizers to training other people
 - Follow up with people who are expressing interest
 - What is the immediate action that you're asking people to do

First experiment is on Training the Organizers!!!

Train the trainers by 2nd week of August

- On thrutext - with HMK
- On program - work, metrics, timelines

Immediate next steps:

- ***Nat decides TruText or something else. Dylan can inform.***
- ***Meeting with Dylan to outline training on app and hmk.***
- ***On program - work, metrics, timelines: Dylan and Matt's support with organizers to weigh in***
 - ***Turf:***
 - ***Who:***
 - ***Vision:***
- ***Matt to confirm saying spend time here.***
- ***Nat holds 2 times with organizers for trainings.***
- ***Data director needs training on this, learning about inputting into ThruText, will need to generate a list and then export those mobile numbers (usually from voter file and can supplement from own member list, any screens for age, race, class). Then input those into thrutext and screen through. Nat will talk with Micheal.***
- ***Matt create new experiment log for this first experiment***
 - ***Pull from HMW questions above***
 - ***Pull in lessons from GC training experiment.***

Success:

- Will feel like team that is looking forward to the work, excited that there is a medium to do outreach and member development. Organizers feel ownership.
- Nat will feel relieved, accomplished.
- Matt - we feel confident in training and organizers are ready to go and feel equipped for success
- Success: trepidation and goes in it anyways, believe in the mission and the work and community.

Public Facing training

- To the member leaders
- Each organizer does one or centralized - 3 trainings a week

ThruText/Hustle

- Data and text management side
- Will need to load it in,
- Does cost per message
- Matt recommends ThruText

Outvote

- Can send messages to strangers
- Can also do relational organizing - can sync up messages for all folks in phones.

Some kind of Slack Group to replace physical meeting space

- Chat directly there.
- Volunteer leaders can see each other, celebrate that sent 500 members
- Community building
- Join default channel and share 1 thing they learned and what are jazzed about at WACAN, then get into more main channel and say I'm ready. Then get the log in. You'll get 500 to send, then reply to them, if you want another 500 then go.
- Organizers are going to have to figure out a regular debrief schedule with block captains (zoom or phone call)

Determine engagement ladder

- What is the first ask?
- Is there a member meeting or orientation to learn more about WACAN and political education. Meet other members.