Leadership Ladder of Engagement Workbook

Purpose

As part of People's Action's Organizing Revival, the network plans to adopt a unified framework of membership engagement. Successful implementation of the framework relies on robust translation of an affiliate's organizing work into data infrastructural practices. This workbook is designed to support affiliate members with this translation.

Overview of the Leader Ladder Framework

The framework includes 5 tiers:

1. [1] Primary/Code Leader
2. [2] Leader
3. [3] Activist/Volunteer
4. [4] New Recruit/Supporter
5. Prospect

Each tier includes a set of criteria that identifies the types of actions a member needs to hit in order to be incorporated into that respective tier. These criteria have a general definition, but organizations need to select the common events they find important to track and measure for each criteria.

Additionally, affiliate members will need to set a threshold for these common events. Thresholds include two components:

1. Minimum count: This is the minimum number of events that we look for a member to accomplish for each criteria.
2. Timeframe: The minimum of events need to be achieved within this timeframe.

If this sounds confusing, we promise that it'll be clearer once we lay out the workbook exercises below.

Before we do so, we want to set some expectations. The ultimate goal of the leader ladder framework is to enable our network to measure our power-building efforts. Systematically collecting the data to track our efforts will not be an easy task. As a result, we don't want to complicate our work more than we need to do so. When considering the common events that we should track, we highly urge affiliate members to consider balancing implementation and impact. Aiming to collect hard-to-implement data points can be impactful, but the resources and capacity dedicated to that project may take away from our organizing and campaign work. How then might we strike a balance between the two?

We created a chart (see Figure 1) to visualize how we're thinking about implementation and impact. Three of the quadrants are relevant to our work.

- *The ideal scenario*: Represented by the top-right corner, these data points are relatively easy to collect and very impactful. Event attendance is one example. Collecting this data can inform us of our members' long-term engagement with our organizations.
- *Vanity metrics*: Represented by the bottom-right corner, these metrics may be relatively easy to collect but they tell little about the impact of our collective work. Often we have to collect these data points, because we need to present them to our funders. Examples include door counts or text messages sent.
- *Multi-day hike*: Represented by the top-left corner, we use the metaphor of a multi-day hike to describe how much more effort goes into collecting these types of data. Sometimes the payoff might be incredible. Other times, the payoff may be less than stellar. It takes a lot more commitment and effort to collect this type of data, so we need to be certain about collecting them. An example of this is individuals' identification with an organization (i.e. Do they feel like they are an active member of that organization?). This is difficult to collect, because we'd have to survey everyone for this information. Even more challenging, we'd have to survey folks multiple times a year in order to determine whether their responses change.

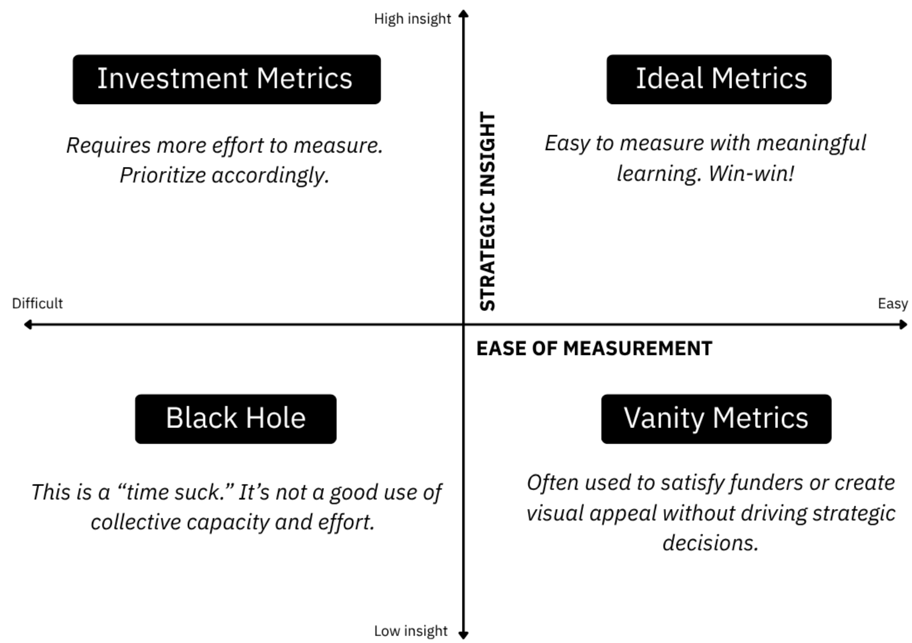

Figure 1: Balancing implementation and impact

Identifying Common Events and Thresholds

In the following pages, we've created an activity to help each affiliate member identify the common events and thresholds that would make up the criteria for each rung of the ladder. These common events should represent the types of engagement that you need from your members in order to make your campaigns successful. *Additionally, don't forget to balance implementation and impact. The easier that we can make implementation for our future selves, the better!*

Activity: Outline

This activity is broken out into 6 steps:

1. Identify common events
2. Identify roles
3. Common events & criteria matching
4. Define thresholds
5. Visualization exercise
6. Reflections and further questions

Step 1 - Identify Common Events

If you have an existing leadership ladder, use it as a reference for this step. List and identify ways that members can engage in your organization (e.g. "attend a monthly committee meeting). We'll call these "common events." Please have the common events be *as specific and discrete as possible*. Making them too broad will make it harder for future steps (i.e. "The person engages with us online" is too broad. A better common event would be "The person is subscribed to and clicks on our newsletter.")

Step 2 - Identify Roles

In this step, please list out all the major roles a base member in your organization can hold. Again, feel free to refer to an existing ladder if available. Provide a short description (1-2 sentences). This list does not need to be exhaustive. This exercise is meant to help us reflect on the myriad ways that members currently learn about organizations, engage in them, and/or take leadership.

Major Roles	**Description**	**# Of Members Currently In Role (Best guess)**

Step 3 - Common events & criteria matching

Now that we have outlined all the common events and roles in your organization, let's translate them to the Leader Ladder framework. Compare the major roles and common events you've listed above with the Leader Ladder framework's rungs and criteria. Which rungs are most similar to existing major roles? Which criteria seem to best encapsulate one or more common events?

In the following worksheet pages, identify which rung of the ladder you're working on at the top. Then, list the common event in the first column and the corresponding criteria in the second column. For now, *skip the third and fourth columns.* We'll return to them when we get to Step 4.

Remember that you are able to repeat a criteria as many times as needed in order to cover all of the common events you've listed. It is also not required that every criteria needs to have a common event associated with it. This is meant to be a universal framework so not all criteria in the framework will be relevant for every organization, take what you need and feel free to leave the rest. Use the Leadership Ladder Analysis Final document for example references for the criteria. As a reminder here are the rungs and the corresponding criteria available for them:

Prospect

- Have had at least 1 interaction with the organization that signals interest in the work.

New Recruit/Supporter [Rung 4]

- Minimal attendance at events/meetings
- Financial contributions
- Basic communications

Activist/Volunteer [Rung 3]

- Moderate to considerable attendance at events/meetings
- Financial contributions
- Volunteers to take on a role at an event or support event turnout
- Has had a 1:1
- Identifies with the organization

Leader [Rung 2]

- Takes on membership and recruitment role - is building their own base of relationships
- Financial contributions
- Attends one or multiple leadership trainings
- Provides comms support
- Attend a conference and/or participates with local/state coalitions or with national networks

Primary/Code Leader [Rung 1]

- Takes on membership and recruitment role - is building and cultivating their own base
- Financial contributions
- Takes on a mobilization or action leadership role
- Takes on a leadership role and assists with strategic planning
- Conducts 1:1s of others
- Participates in National Network Activities
- Provides training support

Here is an **example** of how an organization might begin to fill out this table:

Rung: New Recruit/Supporter ____________

⬇️ STEP 3 ⬇️		⬇️ STEP 4 ⬇️	
Common Event	**Criteria**	**Threshold**	**Notes**
Contributes $50 in annual membership dues	Financial contributions	____ number of occurrences over ___________ period of time	
Makes a call to state senator	Basic communications	____ number of occurrences over ___________ period of time	

Now, it's your turn to give this a shot!

Rung: ______________________________

⬇️ STEP 3 ⬇️		⬇️ STEP 4 ⬇️ Only fill out after reading step 4	
Common Event	**Criteria**	**Threshold**	**Notes**
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	

Rung: ____________________________________

⬇️ STEP 3 ⬇️		⬇️ STEP 4 ⬇️ Only fill out after reading step 4	
Common Event	**Criteria**	**Threshold**	**Notes**
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	

Rung: ______________________________________

⬇️ STEP 3 ⬇️		⬇️ STEP 4 ⬇️ Only fill out after reading step 4	
Common Event	**Criteria**	**Threshold**	**Notes**
		____ number of occurrences over __________ period of time	
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		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	

Rung: ______________________________

⬇️ STEP 3 ⬇️		⬇️ STEP 4 ⬇️ Only fill out after reading step 4	
Common Event	**Criteria**	**Threshold**	**Notes**
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	

Rung: ______________________________

⬇️ STEP 3 ⬇️		⬇️ STEP 4 ⬇️ Only fill out after reading step 4	
Common Event	**Criteria**	**Threshold**	**Notes**
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	
		____ number of occurrences over __________ period of time	

Step 4 - Define thresholds

Organizations ultimately will need to decide on the unique combination of common events and accompanying thresholds that comprise a criteria. These can vary for an organization. For instance, organizations can decide to set very different thresholds for "Being a dues paying member." Some possibilities may include:

- Has paid at least $20 within the last 12 months in donations
- Pays a monthly membership fee OR pays annually for their membership
- Has paid a specific membership fee anytime within the last 3 years
- Has paid their membership fee within the last 12 months OR has a membership credit on their account within the last 12 months

Organizations may have thresholds different than the ones we've listed above. We don't expect the thresholds to be the same for all organizations, because each organization will need to decide based on their communities and local needs.

As organizations set thresholds for each criteria, they can also decide the unique combination of criteria that individuals need to meet in order to be counted as being on a particular rung of the latter. Here is an example. Let's say that an organization is defining thresholds for new **Activists/Supporters**. They're expecting individuals to be actively engaged in meetings or contacting their elected officials, as well as pay dues. Their thresholds could look like this:

- At least one of the following is true:
  - Attends 2 events (large-scale action, committee meeting, monthly meetings) within the last 12 months
  - Has contacted their elected officials (e.g. letter, phone call) two or more times
- And they must be paying dues in one of the following ways:
  - Donated $50 once within the last 12 months
  - Has a recurring monthly donation for membership dues of $5/month in the past year
  - Has an approved membership fees waiver on their account within the last 12 months

Organizations have a lot of flexibility on how they adapt this framework when setting thresholds. We recommend keeping it simple at the beginning. It will ease the process of building the data infrastructure. We can always add more complexity later.

For this step go back to the table in Step 3 and fill out the Threshold column (the third column) for each common event. If the thresholds for a series of common events should be considered together, add that in the Notes (the fourth column).

Here's an example of what this might look like

Rung: New Recruit/Supporter___________

⬇️ STEP 3 ⬇️		⬇️ STEP 4 ⬇️	
Common Event	**Criteria**	**Threshold**	**Notes**
Contributes $50 in annual membership dues	Financial contributions	_1_ number of occurrences over _12 months__ period of time	This or "has waiver"
Makes a call to state senator	Basic communications	_2_ number of occurrences over _12 months_ period of time	
Has membership dues waiver on their account within last 12 months	Financial contributions	_1_ number of occurrences over _12 months_ period of time	See $50 annual dues

Step 5 - Visualization exercise

Now that we have built out the rungs with common events, criteria, and thresholds, let's gut check what's in the table above with our organizing experiences. Does this resonate with our understanding of what it takes to win a campaign? In this step, please do the following:

1. Pick a rung on the ladder of engagement and a member who you believe is on that rung.
2. To the best of your knowledge, check common event by common event and validate if that person is meeting each threshold.
3. Did they pass the thresholds that you've set?
    a. If Yes – Great now repeat this test again with the next rung up and a new leader

   b. If No – Then there is a mismatch between the lived experience of the leader and the way the common events and thresholds are written down. Please go back and make adjustments as needed
4. After you are able to run through all of the rungs successfully then you are ready to move the framework to a broader org-wide roll-out!

Step 6 - Reflections and further questions

This workshop and activity are meant to be a starting point in the adoption of the standardized framework for the leadership ladders we have across the People's Action network. It will require continued collaboration at the organizational level and network level to ensure full adoption and ultimately a stronger network where we are scaling our tactics, testing our strategies, and ultimately growing our power. As we continue down this work here are some additional questions to take back to your organization and keep the conversation going:

1. What excites you the most about the potential of this framework?
2. How can you involve your community in shaping how this framework is used?
3. What vision do you have for your team's data culture in the next year? In the next 3 years? In the next 10 years?
4. How could better data and data structure help your team make more strategic decisions?
5. What specific organizing goals could be improved with the framework we are discussing?
6. As we improve our data collection and management practices based on this framework, what insights are you excited to draw from the data? What are you excited to test?
7. With a framework like this, how can data automation reduce the amount of redundant data tracking work that organizers currently may be doing?
8. How do you envision this framework impacting the relationships with your community members, volunteers, or coalition partners?
9. Who is responsible for managing and maintaining your data? How well-defined are their roles? Do you currently have the internal capacity needed to adopt a framework like this to your existing CRM software (customer relationship management)?
10. What data are you currently collecting about your organizing efforts? How is it being used?

11. What small steps can you take immediately to align your team with this framework?
12. What ongoing commitments (time, staff, resources) are you willing to make to maintain the framework?
13. What training or resources would your team need to fully implement this framework?
14. What barriers do you anticipate during implementation, and how might you address them?
15. What support or collaboration do you need from other teams, departments, or People’s Action national?