Citizenship Case Overview
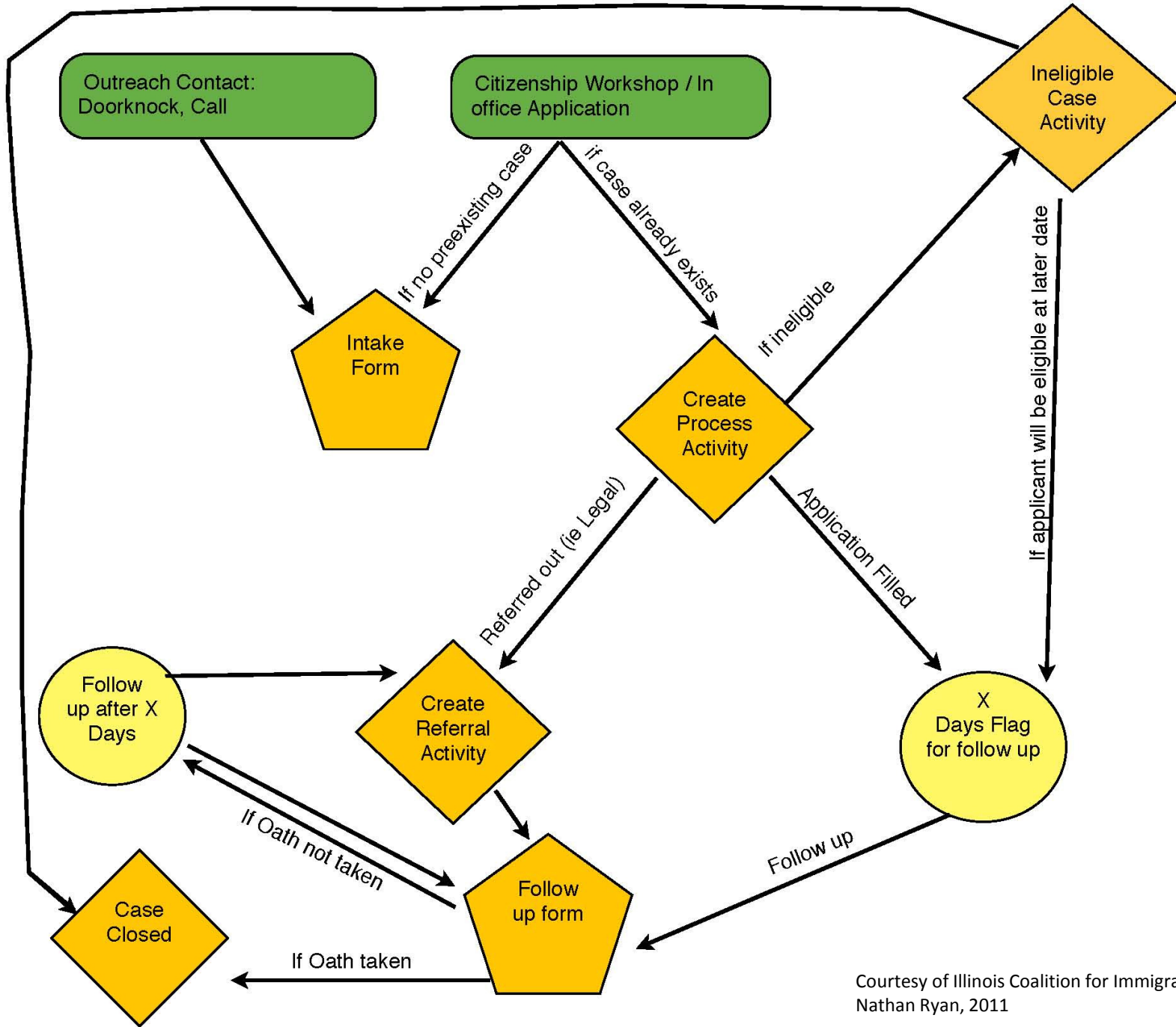
Outreach Contact: Doorknock, Call

Citizenship Workshop / In office Application

Ineligible Case Activity

If no preexisting case

if case already exists

Intake Form

If ineligible

Create Process Activity

If applicant will be eligible at later date

Referred out (ie Legal)

Application Filled

Follow up after X Days

Create Referral Activity

X Days Flag for follow up

If Oath not taken

Follow up form

Follow up

Case Closed

If Oath taken

Case Study: Labor/Community Strategy Center Organizing Workflows for Powerbase Planning

Daniel W. Kim, Communications Organizer

Among the many workflows of our basebuilding work in the Bus Riders Union & Community Rights Campaign, we have targeted 3 for initial incorporation into Powerbase because they are the "everyday" foundation of the organizing process:

> **1) Finding New Contacts (field organizing)**
> **2) Following Up (followup conversations)**
> **3) Turning Out Contacts to Event (phonebanking)**
> * Only the first 2 workflows are in the handout below.

A contact who comes through this process attends their first event/meeting and crosses an important threshold to become categorized as a "newly active member." Organizers have a whole other set of "contact development" workflows for this category of members.

Workflow 1: Finding New Contacts

Organizers are out in the field: on a bus, in front of a highschool when school lets out, handing out flyers, starting cold conversations to recruit new members. A typical BRU day of organizing is 4 hrs out on the buses. It looks like this:

1) **Out in the field** (for 4 hrs of organizing, a BRU organizer will bring back 8-10 new contacts recorded on a contact sheet)

> Data collected (table format):
> - name, address, phone, email
> - language (we communicate and send materials in 3 languages)
> - geographic source (where was the organizer: what bus line, area of city; for CR organizers, they need to record what highschool campus they were on)
> - notes about what they talked about—2 essential things are recorded: details to help you remember who the person is when you follow-up later; and topic notes about the conversation so that you know what to talk about later; often you will also make some notation to indicate the especially good contacts to prioritize) NB: access/confidentiality/user-permissions are important: remember that notes you write about new contacts are not private; that person might some day end up as a volunteer working in the dbase in reading what was written about them so long ago)
> - membership sign-up (some new contacts will become members on the spot for either the $1 membership or the full $10 membership)

2) **Back at the office**
   a) enter all the contacts in dbase (need an efficient data entry form/profile)
   b) add all contacts to email list (we want to be able to check a box to add them and generate an automated welcome email)
   c) process all membership sign-ups (triggers another workflow: record in dbase that they became members, of what type… dollar or full member, date became member which triggers renewal

process later, print then laminate a membership card, personalize and print a welcome letter, stuff envelope, affix postage, deliver to outbox)

d) categorize contacts by priority for follow-up conversations (organizers are required to enter all new contacts within one week)

3) **Other sources of new contacts**

- highschool in-class presentation (Community Rights does a lot of these: teacher invites organizers to give presentation to their class; a class of 30 often results in 20 new names on contact sheet)
- called office ("I'm calling because I saw a flyer")
- emailed us (through web "saw your webpage") or phone call ("I saw a flyer")
- school ("we learned about BRU in a class")
- media ("read about you in the paper)
- personal recommendation ("someone said I should check you guys out")
- event/rally/march (sometimes people just show up and we meet them there)
- the point of the above is that while we recruit many of our members directly, many members are organized by us indirectly; we would like to track these "sources" in the dbase so that we can better understand and measure recruitment

Categorizing/Prioritizing New Contacts:

Lead 1—high-priority (high potential; call first; "starred")
Lead 2—not high priority but still viable; should call
Lead 3—do not follow-up; they are no longer interested; could not be reached; or organizer assesses as do not call, or not worth calling (in which case they can remain on email list to keep the door open)

* essentially, anyone who is categorized as either Lead 1 or Lead 2 is a "viable" new contact; non-new contacts are in different categories below

Workflow 2: New contact follow-up

An organizer is expected to follow-up with every new contact by phone <u>within 4 weeks</u>. The desired result of a follow-up conversation is to get the contact to commit to a next step, usu coming to the next monthly membership meeting. With a continuous flow of new contacts coming in, every organizer is trying to stay on top of their "list" by constantly updating/reviewing their list.

Workflow for an average night of "*making my followup calls***":**
1) sit down & review who are all my recent new contacts
2) sort them (by priority, also by how old bc "I gotta make sure to call these before they go stale")
3) get ready to make calls (look at notes for each person you want to call to refresh memory of who they are, what's good to talk about)
4) begin calling
5) many calls fail to reach person (no answer; left a message; bad phone number); log the call result
6) the call connects—talk! (goal is to find deeper unity, strengthen human relationship, and ultimately, get them to take next step, usu to come to next monthly meeting or major event)
7) after call, record key pts of assessment in notes, results (add person to event mobilization list if you got a commit; or upgrade from "Lead 2" to "Lead 1"; or downgrade category to "Lead 3" (do not follow-up) if it was no good

Courtesy of OneAmerica, Jazmin Santacruz, 2011

B G O R G A N I Z I N G

Map out area → **Go to area/make contact** → **Set up Community Meeting**

Churches · Local Contacts

When · Where · What · Why

Set up Community Meeting → **Prepare for Community Meeting**

GOAL · Docs · Speakers

Prepare for Community Meeting → **Do Outreach**

COMMUNICATIONS · Churches · Local Media · Local Contacts

Do Outreach → **COMMUNITY MEETING**

Talk to Media · IDENTIFY LEADERS · INTAKE · Take Pics/Video · Tweet/FB

COMMUNITY MEETING → **SMALL MEETING** → **SET UP B.G. MEETING**

When · Where · Why · What

SET UP B.G. MEETING → **Prepare for B.G. Meeting**

GOAL · INPUT DATA IN SALESFORCE · IMMIDIATE ACTIONS · ESTABLISH RELATIONSHIP

Prepare for B.G. Meeting → **1ST B.G. MEETING**

Assign Roles · STICK TO GOAL

GROWTH

STATE WIDE ACTIONS

LOCAL ACTIONS

Organizing | **Communications** | **Fundraising**

HOW DO THEY GET TO US?

- 1:1
- Teach-ins, Forums, Events
- Web sign-up. Email, Action fr Social media & ads
- Main database
- Coalition, Email & web research
- E-activists
- Web research Foundation prospects
- Major donor outreach

HOW DO WE ENTER THEM?

- Enter 1:1
- Excel Template
- List circulated To staff
- Enter 1:1
- Enter 1:1

WHAT DO WE DO WITH THEM?

- Events, Activities, Print & Email Communications
- Coalition & blast email
- Organizational mailings
- Press Outreach
- Online appeals
- Events, Activities, Print & Email Communications, Deadlines

WHO DO WE DEFINE AND FILTER THEM?

- Grouped by Org Type & Prioritized by each Action.
- !no overall 1,2,3 rating!
- More segmentation
- Topic-based Hotlist exported Volunteer Excel Or Google Doc
- !Volunteers not integrated 1,2,3 ranking still in development!
- Synched quarterly W/ main database
- Synched manually
- Individual activist/ Donor, foundation, Other org type
- Not segmented by prospect vs. current vs. past funder

How do we define membership?!

Courtesy of ALIGN, Kristi Barnes, 2011

Organizing Data Workflow

Organizing: Periodic Review of Leadership Zones

Activity

CRM Input Activity

CRM Review Activity

Automated CRM Activity

Organizing

Pull list of all people and their action history → Review action history for each person → Should this person move up or down in leadership zone?

— no →

— yes → Record a potential change → Discuss proposed changes as a group → Make decided upon leadership zone changes → end
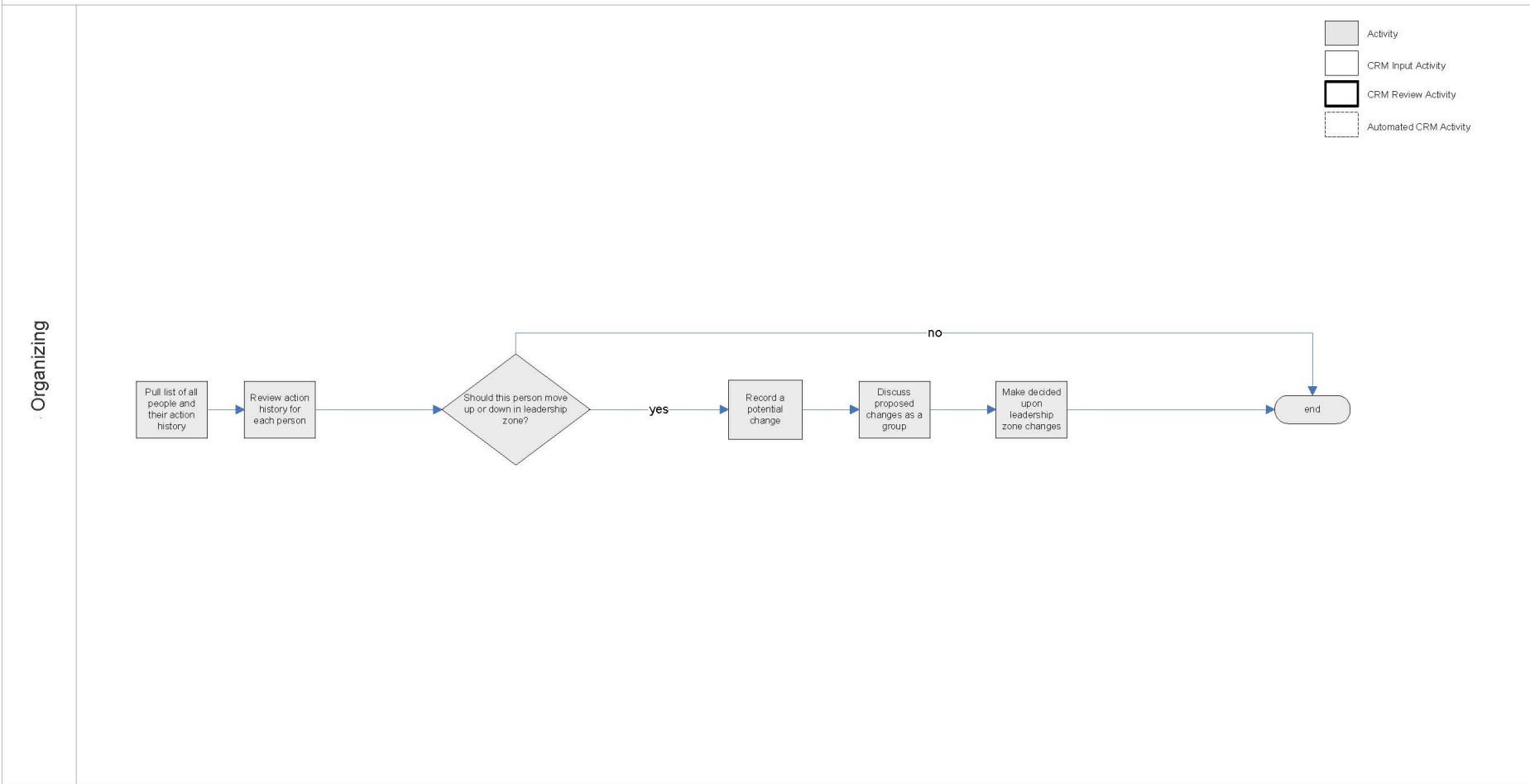
New Major Donor Data Workflow

New Major Donor

Legend:
- Activity
- CRM Input Activity
- CRM Review Activity
- Automated CRM Activity

Donor Management

Donor campaigns: 2 focused effort by staff and board. Do we hold off on the prospect until next donor campaign?

New donor prospect → Research into Donor → Should we hold off for next donor campaign?

Should we hold off for next donor campaign?
- **yes** → Record as part of next donor campaign → end
- **no** → Should someone other than Donor Manager (or ED) be lead?

Should someone other than Donor Manager (or ED) be lead?
- **yes** → Assign to appropriate board member, etc. → Ask Board member for involvement
- **no** → Intro email/ phone call/ letter → Mail merge: Info form letter

Intro email/phone call/letter → Initial Call/ Meeting → Invite them to events → Set up reminders for appropriate check back → Follow up and send materials → Another cultivation step necessary?

Follow up and send materials → Annual Report / Issue Specific info / Newsletter / Brochure

Set up with complimentary trial membership

Another cultivation step necessary?
- **yes** → Set up with complimentary trial membership → Initial Call/ Meeting
- **no** → To Ask Process

Board Member

Jane... has to follow up with Board Members to make sure this happens

Does board member accept assignement?
- **yes** → Board Member may email before hand
- **no** → Assign to appropriate board member, etc.

Courtesy of Steve Andersen, ONE/Northwest