

## A BLUEPRINT FOR ORGANIZING

1. **Define your concerns.** What do you want to achieve? What are you committed to? How will you communicate your ideas to others?
2. **Define your community.** Is your community a group of friends, your neighborhood, or workplace? These are all valid starting points for organizing.
3. **Where are the rewards?** Remember that most people, including you, will voluntarily continue to do only what they enjoy or get great reward from. Many will get and stay involved primarily because of the other people they get to work with. Organizing is a social process that works only when it is enjoyable and cooperative rather than stressful and competitive.
4. **Identify existing community organizations and groups.** How will you work with them, and how is your effort different? Organizing means increasing communications and improving relationships. Look for opportunities to cooperate and network. Don't unnecessarily repeat what others are doing, or work against them. Learn about and respect the history of your community and the efforts of people in your community.
5. **Identify available resources and tools.** Is there money available, and/or other kinds of assistance for your work? What information is readily available?
6. **Find out what other people care about.** Most people won't put their issues aside to deal with yours, even if you are convinced your concern is THE most important. An initial phase of all organizing is outreach and issue identification. Don't make the mistake of valuing the ends before the means. You know your perspective. Take time to talk and work with others to find out their perspectives. Don't expect to find short-cuts or quick-fixes. Value the process and the steps you take together as a community.
7. **Find a focus and do something.** While organizing encourages us to keep in mind that everything is connected to everything, we need to keep our perspective by putting one foot in front of the other in order to accomplish our goals. We need to focus our energies and resources. Start working when the community has a goal and is able and willing to begin work.
8. **Identify existing examples.** Gather examples of communities that have done things similar to what you have in mind. Talk with people. Find examples in articles and books. Most of what you can imagine doing has been done somewhere else. People are convinced that something is possible when they see it has already been tried and proven.
9. **Balance short-term versus long-term goals.** Successful organizing means finding short- as well as long-term victories. Do your ideas and plans inspire enough people to give them a chance to succeed? Do the programs the community has planned offer clear and convincing benefits when compared with the status quo or other alternatives?
10. **Organizing is a process.** Organizing is about change and development, not about absolutes but working to make things tomorrow relatively better than they are today.
11. **Stay encouraged.** Among other things, organizing offers the hope that humans are miracles of creation.
12. **Have fun!** You are likely to achieve your goal in a non-harmful manner if you are at peace with yourself and others.

## PLANNING

### Checklist for Choosing an Issue

A good issue is one that matches most of the following criteria. Use this checklist to compare issues or develop your own criteria and chart for choosing an issue.

Issue 1	Issue 2	Issue 3	Will the Issue...
			1) Win real improvement in people's lives
			2) Give people a sense of their own power
			3) alter the relations of power
			4) Be worthwhile
			5) Be winnable
			6) Be widely felt
			7) Be deeply felt
			8) Be easy to understand
			9) Have a clear target
			10) Have a timeframe that works for you
			11) Be non-devisive
			12) Build leadership
			13) Ready your organization for the next campaign
			14) Have a pocketbook angle
			15) Raise money
			16) Be consistent with your values and vision

**Supporters:** Your constituency, or body of supporters.

- Who cares about the issue?
- What do they stand to win or lose?
- What power do they have, and how are they organized?

If the issue you have selected has a constituency – hopefully already organized – determine how to bring them into your campaign. Your overall goal is to develop a long list of potential allies.

**Opponents:** All the groups, individuals, and institutions that stand to lose or be very upset if you win.

- What will your victory cost them?
- How will each actively oppose you?
- What will they do or spend to defeat you?

In a few cases you may plan to neutralize them, but even if there is nothing you can do, it is best to have some idea of what to expect as the campaign unfolds. List the power of each opponent. How does the strength of your constituents measure against the strength of the opponents in the eyes of the people who can give you what you want?

**Targets:** The people on whom you focus in the campaign.

- **Primary targets** are the persons with the power to give you what you want. Because the person is referred to as a target does not mean that the person is evil. It simply means they are the focus of the campaign. Personalizing the target is a fundamental rule of organizing. The target is always a person. Even if the power to give you what you want is actually held by an institution such as a school board or local board of directors, personalize it. Find out the name of the person who can make the decision, or at least strongly influence it. Make that person the target. This helps to narrow the focus of the campaign, and make your organization's members feel that winning is possible. A campaign to change a person's mind is much more believable than changing the policy of a large institution.
- **Secondary targets** are the persons who have more power over the primary target than you do. But you have more power over this person than you have over the primary target. When you list secondary targets, write down what power you have over them, and what power they have over the primary target. For example, tenants in public housing who wanted their buildings painted targeted several members of the city housing authority. When tenants discovered that old lead paint was peeling off the walls, they made the head of the health department their secondary target. She didn't care about the dispute with the housing authority, but the health hazard posed by the lead paint had to be corrected.

## Goal Setting

Identify goals:

- **Long-term goals:** These are the goals that you eventually hope to win, and toward which the current campaign is a step. Your long-term goal might be to have the education budget well funded to provide the services that educators require. The legislation you are now supporting won't accomplish all of this; it will only close the budget gap in the short-run. However, it is a good step.
- **Intermediate goals:** These are the goals that you hope to win in this campaign. In this case, it is the passage of the legislation you are supporting. A housing group might state its goal as fair housing, and an environmental organization, to end toxic dumping. But these goals are so general that they only restate the problem. Another too-general campaign goal is "to educate people," because there is rarely a way to know when this has been accomplished. Intermediate goals must be specific, such as state mortgage guarantees for low-income home buyers, or mandatory jail sentences for toxic dumpers.
- **Short-term goals:** These are steps toward your intermediate goals. They are necessary because: (1) few groups are strong enough to win a major campaign without a period of building power; (2) in order to sustain your organization in a long campaign, people must see small victories along the way. For a local community organization working on a neighborhood issue,

the short-term goal might be just to get a meeting with the city council member. After that is accomplished, perhaps people will be ready for a next step, a meeting with the mayor.

Goal setting is the foundation of personal and business success. Use the following SMART concept to set effective goals:

- **Specific, stretching, systematic, and synergistic** – a specific goal incorporates an action plan that outlines how you will achieve the goal, and a performance measure that tells you how you will evaluate the goal.

This is the goal-setting formula for ensuring that you're setting a specific goal:

"I will (goal + performance measure) by (specific actions)." For example, "I will increase membership by 25% by..."

- **Measurable, meaningful, memorable, and motivating**
- **Achievable, agreed-upon, action plans, accountability,**
- **Relevant, realistic, reasonable, results-oriented, rewarding**
- **Time-based, thoughtful, tangible, and timely**

## Action Planning

Once you and the client have agreed on tactics, create an action plan. It should include a timeframe, an ordered list of tasks to complete, persons responsible for each task, a list of resources required including materials, facilities, and funds. Keep action plans flexible so you can respond to the unexpected.

Action planning is carefully laying out how the strategic goals will be accomplished. Action planning includes specifying objectives, or specific results, with each strategic goal. Objectives are often associated with a tactic. Tactics are steps for carrying out your goals. They are the specific things that you will do to achieve your goals, and should be clearly worded to the extent that people can assess whether the objectives have been met or not. When you list tactics, determine who will do what, and by when. Every tactic is meant to have an impact. A tactic should not be purely symbolic.

### Criteria for Tactics:

- It is focused on the goal;
- It puts power behind the goal; and
- It meets with your organizational mission. That is, it builds the organization as well as helping to achieve success.

### Checklist for Tactics

All tactics must be considered within an overall goal. Use this checklist to make sure that the tactics make sense given your goal.

- Can you really do it? Do you have the needed people, time, and resources?
- Is it focused on either the primary or secondary target?
- Does it put real power behind a specific demand?
- Does it meet your organizational goals as well as your issue goals?
- Are your members comfortable with the tactic?
- Do you have leaders experienced enough to do it?
- Will people enjoy working on it or participating in it?
- Will it play positively in the media?

## **Information Sharing**

### **Knock and Drop**

How do you tell everyone in your community about an action that your organization is conducting? One option is to knock on doors and invite people to attend. If no one is home, drop off a leaflet. You might also consider putting up a poster, or using a photocopy machine to turn a leaflet into an 11x17 poster suitable for advertising in laundries, community centers, and libraries. If you want people to support your action, the best approach is to ask everyone in your organization to invite or inform friends, family, and neighbors.

### **Newsletters**

A newsletter is one of the most common ways of staying in touch. Community newsletters range in frequency from two to twelve times a year. Most are 8½ x 11 printed both sides or a folded 11x17 sheet printed both sides. Printing is either by high speed photocopying or "instant" offset printing. You may be able to defray printing costs by enlisting the support of local merchants, local government, or community organizations. The big job in putting out a newsletter is finding people who are willing and able to write articles that others are interested in reading. Take the time to search out people with the necessary skills to write and edit your newsletter. Other people should be available to deal with printing, funding, and distribution.

### **Telephone Trees**

A telephone tree is a fast, person-to-person information sharing technique. It requires a coordinator, and a list of who-calls-whom. An ongoing message starts with the coordinator who calls a predetermined list of activators. The activators in turn each call another predetermined list of people, who in turn each call another list. It is important to make sure those at the base of the tree are reliable. The coordinator should check by occasionally calling people at the outer tips.

### **Computer Networks**

A new electronic information-sharing network is now available – the Internet. You can use the Internet to put questions to interested people, simultaneously all over the world. Their replies will help you understand what works in other cities. Many schools and businesses have Internet connection. Those who do not have free access can use a dial-up service provider.

### **Fax Networks**

A fax network operates by everyone faxing messages into a central node. They are then sorted and faxed out automatically to a list of subscribers.

### **Autodialer Networks**

Autodialer is an idea for involving large numbers of people easily in an autodialer which sends short messages to answering machines. Subscribers receive the message on topics they designate, when they are not home. The system uses a computer and database directory to digitize voice messages then send them out automatically. Operating on one line, during weekdays, it can deliver a one-minute message to 5,000 people per week. Evenings and weekends, people can dial back to get further information automatically through a touch tone system. Besides being an effective local broadcasting system that guarantees message delivery, an autodialer network can also be used for election polling.

## **Guidelines for Delivering Your Message**

### **Targets**

- Negotiate with recognizable targets and recognizable institutions.
- Educate your targets, so they understand the issues.
- Express your concerns and give several options for response.
- Research the bad, but appeal to the good. Give your targets a chance to look good.
- Focus your energy and anger on the issues, try to avoid personal attacks.

- Be careful not to slander people (gets you in legal or ethical trouble).
- Show respect for all targets (even the “enemy”).

### **Proactive Actions**

- Move beyond blame and negative attitude to solutions. It’s good to get together and talk about the problems, but most people will get tired of dwelling on the negative and want to start doing something positive about the situation.
- Are there needs/desires which cause the problem?
- Are there other ways to meet these needs/desires?

### **Accountability Measures**

- Be objective and honest.
- Be evenhanded; some people are willing to blame and attack others, but don’t want to be as strict with themselves as they are with others.
- Spend time thinking about how you can improve your own situation, even before anyone else changes.
- Be fair or you will lose credibility.
- Seek out fair individuals outside your organization. You can call them with ideas to seek if you are being fair to the issues and people with whom you are working.
- Work with a variety of different personalities, occupations, and ethnic groups. It helps you to be more open with your methods and attitudes, and encourages creativity.

## **Success Criteria**

**Purpose:** A definition in measurable terms of what must be done for the project to be acceptable to the local and stakeholders.

### **Fitness Checklist:**

- Are all criteria measurable?
- Is each criterion individually realistic?
- Are the criteria as a group realistic? For example, high quality, early delivery and low cost may have conflicting goals.
- Do the success criteria form a complete list of criteria to define what will constitute an outcome that is acceptable to the client?

### **Suggested Content:**

- Target dates
- Major functions
- Personnel level required to operate a deliverable
- Performance levels
- Capacity
- Accuracy
- Availability
- Reliability
- Costs
- Timelines

### **Notes:**

Success should be judged in relation to objective and measurable criteria established at or soon after the plan’s inception. Together, the plan manager’s and client’s expectations will form the foundation of the project’s success.

The use of key performance indicators will provide the plan with objective criteria against which it can be measured. For example: (1) client and stakeholder satisfaction; (2) productivity; (3) mutual learning; (4) training; (5) political & economic risk; (6) legal & contractual risk; (7) financial risk; and so forth.

## **Assessing Client Relationships**

These questions help to highlight aspects that are perceived to be working well and those that require attention.

- To what extent is the client involved, or invited to become involved, in internal planning or other activities?
- Does the client perceive the partnership to be operating well?
- To what extent are communications perceived to be operating effectively?
- To what extent is information shared freely and openly between the parties?
- To what extent are feedback channels perceived to be working between the parties?
- How effectively are conflicts being managed?
- To what extent are performance measurement systems accessible to the client?
- To what extent is adequate monitoring information being provided?
- How high are the levels of client satisfaction and positive perceptions of the partnership?

If you answer “fully” or “largely” to these questions, the relationship is going well. If you answer “partly” or “not at all” to any question, that area needs your attention.

## **Evaluation**

You will need to evaluate both projects and processes if you wish to improve your effectiveness and stay on track.

### **Don't evaluate when trying to create**

Avoid evaluating and criticizing when trying to generate ideas. If you are facilitating a meeting, prohibit criticism when the group is brainstorming.

### **Make honest evaluation a part of your organization's culture**

Make a habit of asking what worked and what could be better for your actions. Consider a special time to evaluate at the end of meetings. If you don't ask for honest feedback, you may not get it. Unhappy people will simply drop out. To get the most honest feedback, make responses anonymous, and obtain responses from people outside your organization.

### **Check on benefits to members of your organization**

At the end of actions, ask participants about the benefits. Did you learn anything? Did you have too little or too much to do? Did you have fun? Did you feel like part of the group?

### **Compare results with objectives**

Is there a gap between what is happening and what you want to happen? If there is a persistent gap, you might consider getting help from a professional organizer. Another way of dealing with a persistent gap is to revise your strategy.

## **Evaluation Tools**

You should regularly reflect on the extent to which your goals are being met and whether action plans are being implemented. Perhaps the most important indicator of success of your plan is positive feedback from your clients. Following are several diverse tools that can be used to facilitate the evaluation process.

### Evaluation Matrix

Although by all appearances, the Evaluation Matrix is a very simple tool, it has a powerful purpose. It helps you to consider a wider range of data collection methods than you might otherwise consider in relation to each of the questions addressed by your evaluation. Evaluators sometimes get into the habit of using one or other data collection method (e.g., an end-of-training questionnaire, without considering the advantages of alternative methods). This tool prompts you to consider each evaluation question and to decide which of the many data collection options have the greatest potential for providing the desired information.

#### Instructions for Use:

- List your questions on the vertical side of the matrix.
- List the feasible data collection methods on the horizontal side of the matrix.
- Consider each question carefully and choose the most appropriate data collection method.

#### Data Collection Methods

Evaluation Questions	Anecdotal Records	Expert Review Checklist	Focus Group	Formative Review Log	Interview	Questionnaire

### Anecdotal Record Form

Observe incidents or listen to reports of incidents which relate to the development and impact of the plan. It is important that this kind of anecdotal information be systematically recorded so that the story of the development and outcomes of the plan can be understood. Therefore, you should complete an Anecdotal Record Form whenever you witness or hear of a significant incident relating to the progress and accomplishments of the plan. An anecdotal record is a verbal account which exhibits these characteristics:

- a. Each anecdote should be limited to a single incident.
- b. It should contain a factual, non-inferential description of the observed or reported incident. (For example, "The trainees said 'I've never enjoyed using a computer before,'" instead of "The trainees expressed dissatisfaction with the training system.")
- c. It should include a description of the situation in which the incident occurs, so that the meaning of the behavior can be understood.
- d. It should be written as soon as possible after witnessing or hearing about the incident, so that all important details can be included.
- e. It should include a separate section describing your interpretation of or feelings about the anecdote. Your personal evaluation is important because your judgments about the plan are valued highly.



### Expert Review Checklist

Expert review is one of the primary evaluation strategies used in both formative (How can this membership plan be improved?) and summative (What is the effectiveness and worth of this membership plan?) evaluation. It is often a good idea to provide “experts” with some sort of instrument or guide to insure that they critique all of the important aspects of the plan that you want reviewed. This tool will help assure that the experts reviewing the plan will focus on variables of most interest to you. (Of course, they will usually provide you with additional aspects of the plan. That’s why they’re called experts!)

### Instructions for Use:

Please circle your rating and write comments on each aspect of the membership plan. 1 represents the lowest and most negative impression on the scale, 3 represents an adequate impression, and 5 represents the highest and most positive impression. Choose N/A if the item is not appropriate or not applicable. Use additional paper for comments.

NA=Not applicable, 1=Strongly disagree, 2=Disagree, 3=Neither agree/nor disagree, 4=Agree, 5=Strongly agree

#### AREA 1: FEASIBILITY OF PLAN

- |  |     |   |   |   |   |   |
|--|-----|---|---|---|---|---|
| 1. This plan provides stakeholders a clear knowledge of the plan objectives. | N/A | 1 | 2 | 3 | 4 | 5 |
| 2. The tactics in this plan are appropriate for the objectives.              | N/A | 1 | 2 | 3 | 4 | 5 |
| 3. The pace of this plan is appropriate.                                     | N/A | 1 | 2 | 3 | 4 | 5 |

#### AREA 2: PLAN FUNCTIONALITY REVIEW

1. This plan is motivating and engaging.
2. This plan is comprehensive and reflects our mission.
3. This plan enables us to continuously identify and prioritize issues/goals.

#### AREA 3: DESIGN REVIEW

1. This plan was generated in collaboration with the client.
2. This plan allows for unexpected changes.

### Focus Group

Focus groups are a powerful means of collecting data about stakeholder reactions to your plan. However, focus groups need to be carefully planned so that you get the kind and quality of information you are seeking. The tool below is merely a template. You should modify it as needed for your distinct purposes.

1. Using a focus group is a type of survey activity. Conducting a survey should be done systematically. The overall steps in the survey process are:

- Organize the survey team.
- Determine the survey goal.
- Select a representative sample.
- Generate the questions.
- Construct the instrument (questionnaire, interview, or focus group).
- Test the instrument.
- Administer the instrument.
- Analyze the data.
- Share and use the results.

2. Consider collecting evaluation data with more than one method if time and resources allow. For example, a questionnaire can be used to collect information about global reactions to an interactive multimedia program. Then, either interviews or focus groups can be used to collect more detailed

information. Alternatively, interviews or focus groups might be used to identify the most important evaluation issues that will be included in a questionnaire sent to many people.

### **Formative Review Log**

The Formative Review Log is a simple instrument that can be used by anyone you have asked to review your plan in its formative stages. The instrument has three columns, the first for recording the dimension that the person is reviewing, the second for writing down observations (e.g., concerns, confusing points, or ideas), and the third for recording what actions have been taken in reaction to the feedback provided.

### **Implementation Log**

It is one thing to plan and develop a good interactive program. It is entirely another thing to implement it as planned. Many programs have failed because implementation factors (such as motivation) were not considered. It is essential to make every effort to collect information regarding the actual use of your program as compared to the planned use. The "Implementation Log" tool has been designed to make that comparison a little more systematic.

In addition to space for indicating what program is being implemented and other types of site-specific information, an implementation log should include the following:

- a column for describing what is planned to happen during the implementation;
- a column for describing what actually happened;
- a column for commenting on the differences between planned and actual activities (if any); and
- spaces for additional questions that might be important in the context.

### **Interview**

Interviews are a powerful means of collecting data about stakeholder reactions to a new initiative. However, interviews need to be carefully planned so that you get the kind and quality of information you are seeking.

The tool below is merely a template. You should modify it as needed for your distinct purposes.

1. Using an interview protocol is a type of survey activity. Conducting a survey should be done systematically. The overall steps in the survey process are:
  - Organize the survey team.
  - Determine the survey goal.
  - Select a representative sample.
  - Generate the questions.
  - Construct the instrument (questionnaire, interview, or focus group).
  - Test the instrument.
  - Administer the instrument.
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2. Consider collecting evaluation data with more than one method if time and resources allow. For example, a questionnaire can be used to collect information about global reactions to an initiative or program. Then, either interviews or focus groups can be used to collect more detailed information. Alternatively, interviews or focus groups might be used to identify the most important evaluation issues that will be included in a questionnaire sent to many people.

## **Questionnaire**

Questionnaires are undoubtedly the single most frequently used type of evaluation instrument. Poorly designed questionnaires are often administered at the end of an initiative as a "smilometer" or "happiness indicator." If the only thing you find out about your initiative or program with a questionnaire is whether the stakeholders liked it, you are not making good use of this strategy. Used properly, a wealth of information can be provided by a well-designed instrument.

Questionnaires can take many forms (e.g., checklists, rating scales, multiple-choice questions, open-ended questions, and so forth). Most instruments include a combination of several different types of questions or items. You should design an evaluation questionnaire very carefully so that you get the information you need without requiring the persons completing the questionnaire to spend too much of their time.

## **Evaluation Report Sample**

The Evaluation Report Sample presents one way of structuring an evaluation report. Evaluation reports are notorious for being weighty volumes that few people read. Consequently, lengthy reports have little effect on decision-makers. This tool illustrates a strategy for dividing an evaluation report into two-page sections that each include four parts:

- 1) an attention-getting headline;
- 2) a description of the major issues related to the headline;
- 3) a presentation of data related to the issues; and
- 4) a bottom-line recommendation or summary of the findings.

People who receive a report in this format can take two or three sections at a time and make them agenda items for their team meetings. In this way, the evaluation findings are much more likely to have an impact on practical decisions.