

Getting Started with Distributed Organizing: Petitions

Getting Started with Distributed Organizing

Introduction

People call it different things – distributed organizing, member-led campaigning, wildfire activism. Regardless of the name, there is a central goal: to harness a community’s bottom-up energy to work for changes, large and small, that create leaderful movements more powerful than those directed by centralized or professionalized staff alone.

Many organizations have proven that this way of organizing can work to generate both growth and impact, and there are many more groups who have the potential to benefit from this model. However, these successes don’t mean that you can just set up a platform, snap your fingers, and suddenly have hundreds of successful campaigns run by members. It takes careful planning and an investment across your organization to launch a successful program.

Very few of your members are ready to spontaneously create a new campaign at the drop of a hat. The key to a successful distributed organizing model is to prepare your members so that they’re ready to lead in their communities, and then support them along the way.

Each organization is different, and you’ll want to spend time examining your specific goals and carefully designing a distributed organizing program and launch strategy to achieve them.

Petitions

Open petition platforms allow your supporters to create their own campaigns on your organization’s website.

The key to a successful distributed petitions program using a platform is to prepare your members so that when they have the spark of an idea for a campaign, they remember to come to you and your platform to launch a campaign. It is a process of focusing the energy of your members – who share a broad alignment on your issues and a desire to make change – into strategic, concrete, and winnable campaigns. There are various ways of doing this, including templated campaigns on a specific issue, ongoing storytelling about successful member-led efforts, and a lot of coaching, training, and working directly with members to build their organizing skills.

Each organization is different, so you’ll want to spend time examining your specific goals and carefully designing a launch strategy to achieve them. Below are a few possible outcomes that your organization may wish to achieve through distributed campaigning. Not all organizations focus on all of these outcomes, but you may want to brainstorm how each of them could help further your goals and plan to test a few different approaches to see what works best.

- The ability to work on issues beyond the current capacity of your staff organizers.
- Expanding your reach at the [local](#) level.
- Making campaigns more compelling through the authentic voices of real people, confronting an issue personally, rather than the official voice of an

- advocacy organization.
- Discovering novel ways to talk about issues or policy proposals that resonate more viscerally with members than talking points from insider think tanks.
- Dramatically increasing the volume of campaigns that your organization launches and discovering more viral growth opportunities as a result.
- Growing your supporter list by [tapping into your members' personal networks](#).
- Identifying new and novel campaign ideas from your members that can be [shared and replicated](#) with other supporters.
- [Collaborating with partner organizations](#) that don't have access to sophisticated digital campaigning tools and strategies.
- Tackling campaigns that don't have a single decision maker, but instead have tens or [hundreds of targets](#) that need to be pressured in their own way.
- Developing local leaders or empowering local leaders to run locally targeted campaigns to pressure decision makers in their community.
- Winning more victories that [improve more people's lives](#).

Getting Off the Ground

Your early steps into distributed organizing are about figuring out what works. Be ready to conduct a lot of tests and dedicate more energy and attention to individual campaigns than you would expect to once the program starts to scale. You want to learn what resonates with your members and what doesn't, and that means paying attention to the granular details as well as thinking about eventual growth.

Start with You

Good organizers understand where their members are coming from. What better way to get a perspective on their experience of running a campaign than running one yourself?

You can start by taking some of your existing staff-run campaigns and setting them up as though they were distributed campaigns. You'll get hands-on experience of how the tools work and learn about any challenges you may want to address in training materials. Also, it'll ensure that there's actual campaign content online when members start coming to your site. People will be more inspired to start their own campaigns when they can see examples of what others are doing.

Next, you can reach out to members of your staff or board to see if they have pet projects that would make for good campaigns. Make sure to ask for detailed feedback on their experiences, which can be crucial for identifying and resolving any problems that members may face.

Rolodex / Grasstops Outreach

Once your organization is comfortable using the platform, you can start to expand the circle of users. When the opportunity for a campaign arises – maybe you see something on the news that sparks an idea – you probably know a handful of member activists or partner organizations that would be a particularly good “face” for that campaign. Give them a call or shoot them an email asking them to post a campaign. You'll probably need to hold their hands a bit and coach them through setting up the petition and sharing it with their networks.

At this stage, a “pile on” – where your organization promotes campaigns via email to your list, social media, and other channels – can also be helpful. The goal is to generate traffic to your distributed campaigns site and let people know that it exists. Don't count on a ton of “organic” activity yet – although maybe you will have a couple of superstar members who are already inspired to start campaigns of their own.

Inbound / Customer Service

We all know that our members are opinionated and will often contact us requesting that we run a campaign on a specific topic. Often, these are great ideas that our organizing staff just doesn't have the capacity to work on. In these instances, it's

great to be able to point members to the distributed campaign site. If you want, you

can even issue a challenge. For example: if they get 50 signatures, an organizer will commit to 30 minutes of coaching on the phone, or you'll email the campaign to a portion of your list.

Efforts or Templated Campaigns

One of the most powerful strategies of distributed organizing is the idea of running a lot of small campaigns against many local targets – where these small victories add up to a big impact.

This approach might involve letting your members run separate, but similar, campaigns targeting individual legislators and asking them to cosponsor or support a bill. While a campaign to “Parliament” may seem daunting, breaking it down district by district, naming each individual legislator, and sharing the responsibility for getting a commitment from each, can be far more empowering.

Other times, there may be opportunities for localizing a larger campaign. Skiftet – a progressive organization in Sweden – was running a campaign to stop public transit fare hikes in the Stockholm region. They decided to open up the campaign on their distributed organizing platform, and [encourage members start local campaigns](#) in their own communities. It led to over 50 active petitions and explosive list growth – with over 42,000 signers – helping them win the campaign and jumpstarting their early-stage organization.

Efforts

[ControlShift's Effort feature](#) makes it easy to launch and manage a national or international campaign with many local leaders and local targets. The organization sets the framework for the campaign – what's the goal of the campaign and who should be targeted – and then recruits local leaders to manage the campaign in their community. Each local leader receives support from the organization and their work contributes to the success of the broader campaign.

Other opportunities you might look for include:

- Asking governors or mayors to make a statement of support on an issue. Everytown for Gun Safety asked mayors to declare a gun awareness day.
- Pressuring media outlets to report fairly by not covering climate deniers.
- Getting businesses to take a product off their shelves or adopt a particular policy. SumOfUs got members to start campaigns asking local hardware stores to stop selling bee-killing pesticides.
- Crowd-sourcing targets where there's no authoritative list. Color of Change ran an effort to [take down Confederate symbols](#) and monuments, which exist in thousands of places, including street names, schools, and other landmarks.

Ongoing Strategies

Once a core set of users are comfortable with the platform and you have a set of active campaigns, you're ready to design your ongoing program. Of course, you can keep working with your early-stage programs too, but you'll also want to expand and determine what tactics, support will eventually scale.

Partner Organizations

Much of our work wouldn't be possible without organizational allies. Opening your program up to allied groups can be a huge win-win – allowing you both to recruit more members and multiply your impact.

You can use your distributed platform as a way to cross-post campaigns, growing both organization's lists in the process. For example, keep an eye out for new campaigns from organizations you work with. When you spot one that's a particularly good match, ask them to post it as a partner petition on your site. You

can send an email to a small portion of your list promoting the petition. Signers can choose to opt in to both your list and the partner's, and you'll both reap the benefit of any organic growth from sharing.

Partners

ControlShift's partnerships feature makes it easy to collaborate with like-minded organizations to run petition campaigns (and events) together. Set up rules for how signature information is shared with the partner and grant partner organization staff access to a special partner portal. Each partner organization also receives their own public landing page explaining who they are, the work they do, and the campaigns that you're collaborating on.

Open-Ended Member Petitions

At some point, you may want to begin actively soliciting new campaigns from a wider section of your supporters. Although this is probably the most recognized way of doing distributed organizing, it can also be the most challenging. As we said before, you can't just launch a platform and expect a stampede of traffic. Our supporters have busy lives, and finding strategic opportunities for campaigns is a skill that is learned over time. The goal in this type of program is to inspire members to think broadly about possibilities for change, while helping them land on concrete and winnable campaign opportunities. On the one hand, we want them to source new and innovative ideas from their broad experience, while on the other we need to stay true to our organization's goals. This can be a tricky balance.

A core principle of organizing is that most people won't take action unless they're asked. Getting someone to start a campaign is a big ask, and you'll need to conduct tests to determine the most effective means of asking. Email is probably the easiest channel to start with, since it's simple to segment and measure response. You can challenge members of your team to come up with different appeals for campaign starters, send the appeals via email, and measure the actions that are taken in response. Also, think about different segments of your list. Do you get better results from people who have donated, recently taken action, or attended an event?

It's really important to define what constitutes success. Is it more petitions? More petitions that have more than 10 or 100 signers? More campaigns that actually win? Or is it campaigns that attract people who aren't currently on your list and that help you identify new leaders? You may want to look at many of these metrics and balance them against your initial goals when making a decision about what works.

To keep members engaged, some organizations send rolling recruitment emails where each member is prompted to start a petition once every three months. Each of these emails includes an inspiring case study about a different member campaign. Other organizations look for campaign opportunities, and then email members in the relevant location asking them to start a campaign on that specific issue. Another organization sends their members a survey asking them to pick the issue they want the organization to work on and follows up with a prompt for the member to start that very campaign!

Beyond specific solicitation emails, you can also expand into other channels. You can add an ask to the PS line of autoresponders or emails about other campaigns ("Have an idea for a campaign? Start one here. . ."). Facebook ads allow you to target very specific populations. You might text members asking them to start campaigns about an issue in a high energy moment. Across all of these channels, remember to model the behavior by framing petitions, even those authored by staff, as coming from a particular person and always reminding your members that they can do the same thing.

Supporting campaign leaders

Campaigning is a skill that is learned over time. While members are often able to spot raw opportunities for action, it is rare that they can move to a successful campaign without some level of support from your organization.

Many organizations develop a set of how-to content to share with petition starters. A

scalable way to share this information is to include it in the series of emails that go out after a member starts a petition – giving them important tips at different milestones in the campaign. Other effective channels include short video tutorials, conference calls and webinars, and an email list or online group for petition starters where they can ask questions and learn from one another. 38 Degrees has set up a great [resource site](#) for their member campaigners.

Support

ControlShift was built with support for petition leaders in mind. Each petition creator has access to a petition leader toolbox and tips for how to use the tools most effectively. Organizations can refine and customize these tips to ensure that their petition creators are well supported. Similarly, organizations have control over the emails that ControlShift automatically sends to petition creators.

Beyond the written materials, most groups work with the petition starter directly to massage and edit content if they plan to promote the petition using organizational resources. This is a good opportunity to help the petition starter improve their campaign writing skills and open a line of communication with the leader from the beginning.

Additionally, some organizations do direct coaching for particularly compelling campaigns. By scheduling time on the phone with petition starters, they can discuss how to promote the campaign, schedule an event, work with the media, and stage a high-impact petition delivery. While you can probably communicate much of this information via training guides and online resources, there is no substitute for personal outreach.

Mentors

ControlShift's mentors feature makes it easy to assign a staff member who will serve as a coach for a specific campaign. This mentor can contact the petition leader, offer advice, and be available for questions from the campaign leader.

As your program grows, you may have a set of supporters who have run successful campaigns and are interested in supporting future campaigners. Some organizations allow these committed supporters to become coaches for fledgling campaigns. This model not only empowers your supporters to grow their leadership and campaign potential, but it also reduces your staff's support burden. Organization staff will likely still need to step in if a member-coach is unsure of how to support a campaign, or if the campaign is one that the organization finds particularly compelling, but more basic support can be handled by these member-coaches.

Teams

ControlShift's teams feature allows organizations to create different levels of permissions – allowing member-coaches to have access to only basic admin tools, or to segment campaign support by geographic area.

Supporting Digital Organizing Broadly

Supporting your members through each stage of their involvement is essential to your success. While learning from early tests and homing in on the program structure that best resonates with your members should allow you to scale and increase efficiency, distributed organizing will still need plenty of care and feeding. Depending on the size of your program, you will probably need at least a half-time person – and potentially several staff members – to ensure ongoing results.

Moderation

At a minimum, you'll need to keep a close eye on what comes in on the platform – at least on a daily basis and ideally closer to real-time. Quickly reviewing new campaigns signals your support for your members' work and will ensure that their campaigns and other actions can advance in a timely manner. You may consider

staffing this on a rolling basis – with each team member being responsible a day or a week at a time.

Slack Integration

ControlShift integrates with Slack and allows fast-moving teams to be notified of new campaigns that require moderation as soon as they are created.

Some organizations also have a daily review of new campaigns. They sit down, walk through each new or updated campaign, and assign follow-ups for editing, coaching, PR or other support.

As your program grows, you may find that you need additional tools to manage the relationship between your staff and your leaders. Groups have successfully used Trello, NationBuilder, and Salesforce.com for relationship management.

Integrated Data

ControlShift's native integrations and flexible APIs make it easy to send platform data to the other tools that your organization is using.

Rapid Response

As you build capacity for distributed organizing, it can be an extremely valuable resource in key moments. You'll want to make sure your full staff is aware of the possibilities and trained on the platform so that they can quickly tap into the capacity of your member leadership when it really counts.

Case Studies & Storytelling

Success stories are vital for inspiring members and showing your leadership that the program is worth the time and money. You may want to assign someone who can keep track of successful actions and write compelling stories about what worked. These stories can be shared with staff, your board, and the media to paint a picture of your program's impact.

Equally importantly, these stories should also be shared back to your supporters. Nothing as effectively captures the power of your supporters as a concrete example of when a regular member, just like everyone else on your list, was able to effect change. These stories don't just provide encouragement, but they can also spark new life into supporters and can turn passive recipients into newly recruited leaders.

Ongoing testing and optimization

You will also want to keep a close eye on the overall health of the platform. This means setting up analytics to monitor important paths and funnels, like how many people who land on the petition start page actually complete the process.

Data Analytics

ControlShift is built to easily connect with analytics tools like Google Analytics, Matomo, and Segment.

Beyond aggregated numbers, the most successful organizations will also perform targeted surveys of leaders and/or people who have taken particular actions. The action takers in your distributed organizing program are the best source for feedback about what's working and what needs to be changed. Incorporating this feedback into the program is an ongoing process that's integral to successful programs. The support you provide to your leaders will change over time and constantly refining your program to meet the ongoing needs of your supporters is key.

If one of your organization's primary goals is to grow your supporter list, also you'll need to regularly monitor activity, promote the best campaigns and actions to your list, and track which type of content is recruiting the most new members.

Broad Integration

Once you've tested and established your ongoing program, you'll want to make sure that distributed organizing is fully integrated into your organization. Many organizations link to their platform from their homepage, which makes it easy for organic action takers to get going. You might also consider adding a prompt to start a campaign to your standard email templates.

Integrated Data

ControlShift's front-end JSONP APIs, and other integrations, make it easy to integrate our platform with the rest of your site. Color of Change has done this with their OrganizeFor.org homepage.

Our pre-built CRM integrations also ensure that member data flows seamlessly to your existing databases and mailing lists.

Final Thoughts

Trusting our members to take the lead in organizing and giving over control might be a large shift from the way your organization has worked in the past, but it's also a great opportunity to expand the work your organization is able to accomplish. This style of organizing is about making our movements big enough to win even if it means our campaigns can't be perfect as a result. The challenges progressives and our society face are too enormous not to open up and invite everyone to help.

If you're interested in how distributed organizing can help improve your organization's impact, [get in touch!](#)