

DIGITAL ORGANIZING HANDBOOK

A photograph of three women in a professional setting. Two women are seated at a wooden table with laptops and coffee cups, while a third woman stands to the right holding a folder. They appear to be in a collaborative meeting.

DIGITAL ORGANIZING OVERVIEW

Welcome to your **Digital Organizing Handbook!** This will be a place for you to check back on what we talked about during the digital organizing training – including strategies and best practices for how to use the internet as you organize.

Good organizers organize online and offline – and this handbook will provide strategies and best practices for how to organize people on Facebook, drive narratives on Twitter, mobilize an email list, cut through the internet with interesting content, and use other tools like texting to organize a community.

ALL OF OUR WORK AS ORGANIZERS COMES BACK TO THREE OBJECTIVES:

1. Building Communities

This includes: strategies for creating and building a Facebook group of community members, growing a Twitter audience, and collecting volunteers' email addresses and cell phone numbers.

2. Engaging Communities

This includes: best practices for engaging the members of a Facebook group, posting content that cuts through the internet, and keeping your community primed and ready to take action.

3. Activating Communities

This includes: strategies to mobilize your Facebook friends, group members, and Twitter followers – as well as how to email and text people to get them to take action.

Remember :

Digital **IS** organizing. As an organizer, your job is to meet people where they are. Increasingly, people are online – so you need to be online too. There's no mystery around this: find people and ask them to do things – whether that's in your office, at an event, or on the internet!



ONLINE STORYTELLING

Stories are powerful. They build relationships, engage supporters, and mobilize people to act. They move hearts and minds – both to vote for your candidates (or vote at all!) and to volunteer.

Just as you tell stories offline, you have to tell them online too. It's simple: tell stories of real people (and yourself!) whose lives are affected by the work you're doing, the candidates you're working to elect, and the policies they will enact. Tell the story of what you do every day (hosting events! Meeting new volunteers! Collecting commit to vote cards!) to generate excitement and make it easier for voters and potential volunteers to connect with the campaign or cause. (And if you're sharing someone else's story, make sure you have their permission.)

REMEMBER THESE FOUR THINGS AS YOU TELL STORIES ONLINE:

1.

Find the connection between your subject and the campaign

For example: I'm the primary caregiver for my mom. She depends on Medicaid. Our candidate has spent her life fighting to protect Medicaid, which is why my mom makes 100 calls every week here in our office.

2.

Create a sense of urgency:

The election is in 150 days. That means we only have 150 days left to talk to voters about why Medicaid access is so critical to people like my mom. I know I don't want to wake up on Election Day wishing I had done more.

3.

Tell people why taking action is critical

We know that talking to voters face-to-face is the most effective way to get them to vote.

4.

And then explicitly ask:

Can you join us Saturday or Sunday this weekend to knock on doors?

A tip here:

Make it easy for supporters to get involved by including a link to sign up to volunteer in your posts.

THINGS TO KEEP IN MIND:

- Be a human. Post stories in your own voice – be genuine and be you!
- Be positive online. Highlight the great work of your fellow organizers and volunteers to keep your audience focused on the goal: **winning on Election Day.**
- Where possible, include images/photos. Landscape photos are best for social media. Make your photos look lively with good lighting and color – and action shots are better than still photos. Show people having a great time!





Facebook is the best place to organize online. Because so many people are on Facebook (more than Instagram, LinkedIn, Snapchat, and Twitter combined!), and because Facebook allows you to do so many things (recruit for events! Post in groups! Message people directly!), it's the easiest and most effective place on the internet to organize people.

Right now, Facebook is making it easier for real people to make connections – and making it harder for brands and companies to post things that people will see. That means what YOU post is more important than ever. You are the face of your campaign or organization, and you will be the entry point for a lot of people who want to get involved and find you on Facebook, whether that's in a group, on a post, or in your Messenger inbox.

YOUR PERSONAL FACEBOOK PROFILE IS MORE IMPORTANT THAN FACEBOOK PAGES

Facebook's new algorithm now shows more content from normal people and fewer posts from businesses or brands. This means that your profile will be the best tool for organizing online – even more than any official campaign page. Use these best practices to build a network on Facebook, engage those people, and activate them to take action.

FACEBOOK GROUPS

Facebook groups can be used to build a community around an issue, a campaign, or a candidate. They're a place where people can meet like-minded people, talk to each other, and stay up-to-date on upcoming events.

Facebook groups are also the fastest place to build a community of people who you can get to take action. Treat anyone in a political-activism-related Facebook group like a hot lead! They joined because they're interested in the cause – now it's up to you to recruit them.

You can either create your own group or join another. **Here are ways to build, engage, and activate a Facebook community**, no matter which option you choose.

IF YOU CHOOSE TO JOIN AN EXISTING GROUP:

- Be an active member of any new group you join: comment on recent posts, message people to introduce yourself, and post content relevant to the group.
- Once you've built those relationships, you can move people from engaging with you to being active volunteers and move them toward taking offline action in a meaningful way. As always, post opportunities for people to volunteer, donate, or attend events by including links in your posts.
- Many groups already exist whose mission may align with yours (Planned Parenthood groups, local Democratic Party groups, etc). You can join these groups – and help build, engage, and activate these members.
- When you join a new group, message the group admins to introduce yourself. If they're local, make plans to meet up offline to build up those relationships and turn them into offline volunteers.

IF YOU CHOOSE TO CREATE YOUR OWN FACEBOOK GROUP:

Create a group based on a specific candidate, issue, campaign, or action, and name it so it's clear what the group is.

Here are best practices to build a Facebook group by adding members:

- Make sure to keep your group “open” so group members can add their friends and family members.
- At the end of the day, set aside a block of time to find and friend everyone you interacted with that day. Set a group member goal and encourage everyone in the group to help meet the goal by adding friends. Each day, give an update of how close the group is to meeting the new member goal, and shout out people who have added the most. Create incentive by offering a prize – a bumper sticker, t-shirt, or first dibs at a walk packet, for example.
- Your volunteers should also add everyone they meet to the group. Sit down with your volunteers and go through their friends list with them, finding people who might be interested in being added to the group.

- Find other Democratic groups, county parties, and regional Facebook groups and/or pages to help promote your content, events, and group.

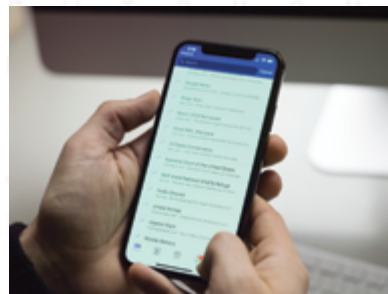


- Add a hyperlink to the Facebook group in your email signature – and encourage your volunteers to do the same.

- Have your volunteers post content to their personal pages – photos, upcoming events, or candidate page content – and then add anyone to the group who likes or comments positively on the post. Utilize the personal networks of your event hosts, friends, volunteers, and connected community members to promote your group and bring in new members.

- Make sure you're regularly screening and approving new group members.

- Add people to your group through other platforms as well – send an email to your list linking to your Facebook group and ask anyone who hasn't joined to join it, and anyone who has to forward the email to friends who may be interested. Tweet the link to join your Facebook group from your Twitter.



Once you've built a big Facebook group, you need to engage its members so they're primed to take action when asked. Your ultimate goal is to get your group members feeling comfortable enough to post to the group on their own, so they're engaged (and feel engaged!). **Here are tips to engage your Facebook group:**

- Be the biggest cheerleader for the group. Post photos of group activities to create a sense of FOMO (fear of missing out) for those who didn't attend, post shout-outs to people you grabbed coffee with or had a phone conversation with, and tag people in posts to create social pressure around contributing to the group.
- Engage with group members both online in the group and offline:

OFFLINE

- To get a diverse number of people posting in your group, ask people offline to post in the groups.
- Ask your volunteers offline to introduce themselves to the Facebook group and share a photo and their personal story. Encourage them to regularly share content to the group when they are in the office or on the doors.
- Make an ask at phone banks or house parties for someone to snap a photo and post it into the group during the event.

ONLINE :

- Welcome every new member to the group with a public tag. Follow up with a Facebook message reaching out, and if you haven't met with the group member before, set up a 1:1. These are hot leads!
- After having a 1:1, post a photo and tag the volunteer in it. Then use that content to encourage them to invite their friends to the group.
- Post albums and tag people in the albums, and encourage others who post photos to tag people in those photos too.
- Post a photo of the office and tag people who you'd like to come to a phone bank that week – or who's scheduled and should bring a friend.



ONCE YOU HAVE A BIG, ENGAGED GROUP, THE NEXT STEP IS MOBILIZING YOUR FACEBOOK GROUP MEMBERS TO ACT:

- Ask current group members to add new group members. Create a goal within a time frame: “We need to add 50 more members by the end of this week. If every group member adds 5 people we can meet our goal.” Once you’ve set a goal, provide updates to create a sense of urgency.
- You don’t have to do all this work yourself. Just as with everything else, delegate and organize yourself out of a job. Ask your most active or most Facebook-inclined volunteers to help you manage the group (or find/engage with other groups) – but make sure they understand why it’s so important and how it needs to lead to offline action.
- Provide links to donate, volunteer, or attend events within the group. Highlight that you’ll be there and look forward to meeting people in person. When you’re at events, post photos of people you’re meeting and tag them online.

Facebook groups also have a few newer features that you can take advantage of. These tools have “badges” that allow members to easily identify one another – who the admins, moderators, and new members are. For instance, if you’re a group admin, you can now periodically post a welcome post that tags new members who have joined your group.

Take advantage of this feature to introduce new members of the group to everyone else

and prompt them to share something about themselves. Asking them why they joined the group or which neighborhood they live in may encourage other group members to connect with them.

There are also group security settings that allow you to monitor the group. As the admin of your group, if you find that a member’s posting has become problematic, you can temporarily disable their posting and commenting abilities.



FACEBOOK EVENTS

- Because so many people are on Facebook, it's a great place to post and recruit for events – and Facebook events are a great way to do that. When people RSVP for a Facebook event, you can message them, you can tag them in the event, you can ask them to share it, and you can post updates – and they'll get a confirmation notification from Facebook. And the best part – every time someone says they're going to an event or interested in an event, their friends will see that in their news feed.
- The event guest list is a great way to engage with people who are interested in coming to an event or are coming to one you're hosting. You can use Facebook Messenger to message an entire event list to provide them with updates or to ask people to sign up for specific tasks related to the event.
- If you create a Facebook event, be an active host; invite every person in the area to your event. Make it public so others can find it online, even if they're not friends with you. Ask people to mark that they're "interested in" the event or "going;" this will make the event show up in their friends' news feeds and help spread the word. Tag people in posts and get them excited to attend your event. Post photos of event supplies arriving or of you and your friends decorating the event space to get it ready.

FACEBOOK MESSENGER

- To build your Facebook group, message people who you see are online and ask them to add friends to the group. You can also recruit people for 1:1s and events using Facebook Messenger, and you can confirm them quickly for 1:1s and events they're already scheduled for. Everything you'd do over the phone, you can also do over Facebook message – test if this is an effective way to reach the people in your turf. Anytime a new individual engages in your group – even if it's as small as 'liking' a post – reach out to him or her via Facebook Messenger and ask them to come to your next event.
- Facebook Messenger lets you send personal messages directly to someone on Facebook. Messenger can be used to build relationships and expand your network by reaching out to people individually to invite them to events, engage with them in conversations related to your organizing work, and follow up with them about any comments or posts they've made that you want to chat with them about – and what's great about it is, if you're friends with them, they get a notification.
- You can also build a custom Facebook friends list in order to quickly message a specific segment of people within your group. First add those people to a Facebook List – like a list of active volunteers, or a unique list for high schoolers – and then you can message that list with events and updates that pertain to them. That's the key with Facebook Messenger: you have to be Facebook friends with them so it doesn't go into the 'other' folder (which no one checks). Add people on Facebook first, wait until they add you back, and then message them. You can use Facebook Messenger to build your Facebook group, engage them, and activate members.

WRAPPING UP FACEBOOK:

So many people are on Facebook that you also need to be there. It's the best space to organize people.

If it's right for your turf, the more you invest in it – in your personal page, in **Facebook groups** (yours and others you join), in **Facebook events**, and in using **Facebook Messenger** – the more you'll get out of it.





Twitter is a social networking platform that lets users post tweets of 280 characters or less. Twitter's functionality isn't ideal for organizing work — it's hard to only interact with people in your turf, and it doesn't get great conversion rates — but it still has value for two main reasons: shaping the narrative online (think visibility!) and letting you communicate and celebrate the work of other organizers. With 330 million monthly active users, it's worth being on Twitter and telling the story of what we're doing — even if you can't recruit shifts or talk to people in your turf.

That being said — in some cases (like fellowship recruitment, contests, etc), Twitter has produced large numbers of hot leads. Reporters and influencers congregate on Twitter, and it's where news breaks — the perfect place for us to try to show that we're excited and we're running a strong on-the-ground campaign.

WHY IS TWITTER IMPORTANT FOR DIGITAL ORGANIZING?

Twitter is a powerful platform for two reasons:

1.

The first is to showcase what you're doing and influence journalists when they write stories (that your volunteers and voters will see!) by trying to push your narrative. Think of it like online visibility – you're getting attention for your candidate, issue, or cause. Think about this cycle: people on Twitter will see and retweet you, local reporters will see it, the reporters will write about it, and it will end up in a traditional news outlet where volunteers and voters see it. This will be especially important during big, campaign-wide moments like debates, endorsements, and weekends of action.

2.

The second reason Twitter is important is to build a campaign culture across the district or state. When you're in your turf in a rural part of the state and you haven't seen another organizer in person in a few days, and you tweet the story of what you're doing, other organizers will see it and engage with it – and the campaign staff can connect every day. As you tweet about your work and your day, engage with other organizers, regionals, fellows, and volunteers who are also on the ground. Celebrate them, retweet them, and tweet back at them.

Next, we'll talk about how to build your Twitter following, engage your audience on Twitter, and activate your Twitter followers.

HOW TO GET MORE TWITTER FOLLOWERS:

- **Put your Twitter handle everywhere.** Include your Twitter handle in your email signature so people can follow you when they get an email from you — and you can promote it in your Facebook group if you're going to be live tweeting an event.

For example: "Tonight's the debate! If you aren't joining us in the office for our watch party, make sure to follow the following Twitter handles: @[candidate] and @[your handle]!"
- **Following strategically.** In order to gain followers (and the *right* followers), follow everyone who follows you. Offline, you should be asking all your volunteers if they're on Twitter — and if they are, follow everyone who follows them. Online, you can also follow the followers of small businesses, liberal organizations, and local Democratic Twitter accounts in your area. These will likely have followers who would be interested in following you.
- **Advanced search and hashtags.** You can use Twitter's advanced search to geo-target keyword searches and find people who are in your turf. Search one of the campaign hashtags and follow people who use it or have it in their bio. Use hashtags yourself too so others can find you.

HOW TO ENGAGE YOUR TWITTER AUDIENCE:

- Tweet a lot! The more you tweet, the better you'll get at it – and the better you are, the more engaged your audience will feel. Remember: tweet in YOUR voice. Don't just repeat talking points. You are the most powerful messenger. Be a human – and don't worry about posting a bad tweet. If it's positive, it's enthusiastic, it's kind, and it's in your voice, it's okay. It's more important that you just do it.
- Pair your tweet with a good photo. Tweets that include images/photos/gifs typically get a higher engagement and impressions rate. Photo tips reminder: landscape mode (flat) is better than portrait mode (up and down), and action shots with good lighting are best.

The same goes for hashtags. Use them if you want, follow them if you want – but don't get tripped up on deciding if you should use one. Your message and/or your photo is more important.
- Live tweeting big events is another way to attract new followers, put out good content, and tell the story of the campaign. If you're at a rally or a particularly good volunteer event, live tweet about what's happening. Think about before-during-after: tweet what's happening before the event (set-up, materials laid out, empty house, excited host); what's happening during the event (people talking, phone bankers calling, canvassers being trained); and what happens after the event (group photo from the event, pile of commit cards, empty food plate, thumbs up from the host).

HOW TO ACTIVATE YOUR TWITTER AUDIENCE

- Make a hard ask, just as you do offline. Talk about why you're making the ask. Talk about why it's urgent. Talk about what's at stake. Include links for people to take action – and directly tag people in posts or tweets to engage with them. Just as offline, hard asks online will increase the number of people who take action.
- You can also tell people what to do and they'll do it. Tell people to click the link, tell them to sign up to volunteer, tell them to follow the state account, whatever you want them to do. Just ask!

DIRECT MESSAGING (DMING)

You can direct message (DM) people on Twitter. It's a great way to directly ask someone to do something – whether that's retweet a tweet, attend an event, or meet you for a 1:1. You have to follow one another to DM, and only the two of you will see the interaction. The upside of DMing: it's more personal, since it's a message just for them.

But the downside: if you're trying to celebrate someone, it won't have the same public accountability that tweeting at someone (instead of messaging) does.

TWITTER ANALYTICS: FIGURING OUT WHAT YOU'RE DOING

Twitter recently opened up their analytics platform to every Twitter user – so if you want to see how many retweets, impressions, favorites, or link clicks you received in a given period, all you need to do is go to analytics.twitter.com. These are mostly vanity metrics, so don't sweat them.

SOME OTHER TIPS:

- Don't engage with trolls – it's not worth it.
- Don't tweet campaign numbers. It's okay to tweet that one of your volunteers knocked on 150 doors in a weekend – but don't tweet any campaign metrics.

TO SUM UP:

As organizers, we are meeting people where they are – and even though you might not get a ton of sign-ups or volunteers off of Twitter, Twitter is another place where people are, so it's a place we need to be. Twitter is how we can control the narrative by influencing reporters – and it's a great place to celebrate the work of other organizers.

EMAIL

Email is a way people communicate, a lot— so we should communicate with people over email too. Especially during the day, when your volunteer targets might be at work and unable to answer their phones, they can see and respond to an email — or mark your message unread for later. Email isn't always the best way to reach every person — but there's a reason campaign digital teams use it: it's fast, it's easy, most people use it and read their emails, and it's another way to reach people you can't otherwise reach.

Running your own small email program is pretty easy. It's a great way to recruit people quickly for events, or shift people quickly for weekends. It's also a great way to celebrate your volunteers (and hopefully motivate other people to get involved). Think about how you already email people — but just do it at scale!

Here is how to grow your email list (by collecting email addresses), how to engage your email list (with tips for how to write a good email!), and activate your audience (how to get them to take action — and how to make sure they're taking action).

HOW TO GROW YOUR EMAIL LIST:

Every email address you collect is valuable. It's a quick way to reach someone and ask them to attend an event or volunteer. Here are some strategies to collect email addresses:

- Ask for email addresses on offline sign-in forms at events — and on any online sign-up form.
- Ask for email addresses during 1:1s and add them to your list.
- Ask people to add people to an email, or to forward an email to friends with a sign-up form.
- Ask grassroots group leaders to email their own email lists asking to add folks to your list. These people are already used to getting emails about progressive causes so this will feel natural to them. Then, collect their contact information and reach out one by one — these are new hot leads.

HOW TO ENGAGE YOUR EMAIL LIST:

Once you've got an email list, you want to keep it engaged so people are primed to take action when you ask them to. Digital teams who run email lists have best practices here: they don't only ask people for money. Every few fundraising emails they throw in a feel-good email about reaching goals, weekend "wrap ups," etc. It's not just that we want people to feel good — if you engage them, they'll be more likely to take action when you ask them to.

HERE'S HOW TO WRITE A GOOD EMAIL:

- Keep it short and clear. Include photos and graphics.
- Link to stuff. (More than once!)
- Include a fun subject line to try to get more people to open it.
- Have a clear ask! Most people will only read your email for 8 seconds – so make sure it's catchy and they know what you want them to do.

HERE ARE WAYS TO ENGAGE YOUR AUDIENCE:

- Send out volunteer celebration emails (this is also a good way to peer pressure your audience into volunteering more).
- Send out recaps from your weekend (with fun photos!) to generate FOMO.
- Send out campaign announcements, like big endorsements.
- Send out emotional stories from supporters about why they're supporting the candidate.
- Send out content that you like from the Facebook page, like new videos.

HOW TO ACTIVATE YOUR AUDIENCE:

You're building your email list so that you can make asks of people. Here are actions you should ask your audience to take:

- Obviously volunteer (and volunteer MORE).
- Join a Facebook group.
- Attend an event (office opening, house party, surrogate event).

SEGMENTING YOUR AUDIENCES:

Asks are more effective when they're specific to the person getting it. Just like when you're cutting lists in VAN, you should think about sending different emails to different groups of people. Here are some examples of how to segment your list:

- Send volunteer recruitment emails to people who haven't signed up for a shift yet
- Send re-shift emails to people who have completed shifts
- Send flake chase emails to people who flake for shifts
- Send confirm emails for people who are confirmed for a shift

TRACKING WHO CLICKS YOUR LINKS:

Campaigns are driven by metrics — and there's a way to track what's working and what's not working with email. [Bitly](#) is easy — it's a free app that does two things: It's a link shortener that makes your links look cleaner, and once you create a bitly account, when you shorten a link, you can track how many people click it so you can see how successful your ask was.

TO SUM UP:

It doesn't make sense for you NOT to try to use email to organize people in your community. If you collect email addresses from people and engage them over email so they're primed to take action (and they know the asks are coming via email), you can recruit for shifts and events, confirm people for shifts, and anything else you want to ask people to do. Don't overthink it: just figure out what works for you and for the people you email!



INSTAGRAM

Instagram isn't going to be very helpful in terms of organizing. People don't click the 'links in bio,' even when asked — and it's hard to build and activate an audience there.

That being said — if you're on Instagram, it's another way you can help tell the story of our campaign. Your followers look at your photos and watch your stories. Post there to make people feel the enthusiasm behind your campaign!

TIPS:

- Use the campaign hashtag in your post. People who can search the hashtag will see it.
- Use the photo tips from above to capture excitement. Make your photos pretty, bright, and in landscape.
- If your volunteers are on Instagram, tag them in your posts to show appreciation.
- Cross post Instagram pictures onto Facebook.

SNAPCHAT

Similar to Instagram, Snapchat isn't a great way to organize. It's hard to build an audience on Snapchat with people from your turf, and it's hard to get them to take action because there are no links.

That being said — if you're on Snapchat, it's another great way to tell the story of our campaign. You can post stories to make people feel the excitement of our campaign!

TIPS :

- If your volunteers are on Snapchat, send them snaps to keep them excited!
- Post on your story about the campaign a lot! It's a great way to generate FOMO.



REACHING OUT TO ORGANIZED ALLIES

When you hit the ground in your turf, identify local groups quickly and find ways to connect with them online. “Like” and follow their Facebook pages, follow them on Twitter, join any existing Facebook groups you can find, and add anyone you can find on Facebook who has interacted with the campaign.

Ask yourself (and supporters on the ground!) who you need to connect with to help build, engage, and activate communities. Ask the local party leadership who their best volunteers are, and ask the local candidates or electeds what groups have traditionally supported them and then reach out to see if they can be involved in your organizing work.



TEST IT OUT/SWITCH IT UP

- With the wide range of organizing strategies and tools out there, it can feel overwhelming to try to do everything. So don't! Figure out which channels work best for your turf and which groups of your universe respond best to different platforms.
- Also, it doesn't hurt to directly ask people how they prefer to be contacted. When someone signs up on a sheet, it's great to give them checkboxes to show how they'd like to be contacted so that you know which method works best for them.
- Start scheduling more 1:1s to connect with people individually and then shift them for a volunteer shift. Reach out to students in high school and college in Facebook groups. Test your confirmation rates by seeing if people are less likely to flake if you call them versus text them.
- For example, it's become widely known that people younger than 40 respond best to text messages to sign up for volunteer shifts and to confirm or cancel their attendance. If you find that you're not getting the response rate you need from one method, switch it up to another. If your volunteer flake rate seems too high in comparison to your colleagues, try something else!



EMAIL US AT ORGANIZING@ANOTHERACRONYM.ORG
WITH ANY QUESTIONS YOU'VE GOT!

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