

Organizing Notes

Action

Week 7

We have been learning the work of leadership in organizing. We learned how to motivate people to translate their values into action with public narrative. We learned how relationship building could ground commitment to common interests. We learned how to strategize turning resources into power into goals. This week we focus on action – mobilizing and deploying resources to enact strategy in ways that can grow the motivation to participate even more. In an association, the most valuable resources are those its constituency can contribute - time, energy, effort - in a word, their commitment. This commitment of resources – volunteer resources in large measure – makes action possible. Whether holding a rally, conducting a delegation, or mounting a petition campaign, all action begins with a commitment. Action does not follow strategy; however, it unfolds together with it. We may learn what is possible only when taking action opens up new possibilities - as when Rosa Parks refused to get up out of her seat on a bus in Montgomery Alabama. Before getting to what it takes to make an action program work, organizers have key strategic choices to make about how to mobilize and deploy resources in general.

Resource Mobilization and Effective Action:

Paying the Piper and Calling the Tune

The way resources are mobilized affects how they can be deployed, and the way they are deployed affects how they can be mobilized, as illustrated in Action Chart #1. This helps clarify the relationship between action programs and resources. As Oliver and Marwell point out, resources mobilized from within a constituency can be deployed with accountability only to the constituency.¹ Outside resources, on the other hand, often entail accountability to those who contribute them - placing limits on how they can be used. When a number of foundations decided that the environment was a priority, for example, some inner city organizations

¹ P Oliver and G. Marwell, (1988), Mobilizing Technologies for Collective Action. *Frontiers in Social Movement Theory*. A. Morris and C. M. Mueller. (New Haven, Yale University Press), 251-271.

dependent on foundation funding decided that the interests of their constituents could be served by focusing on environmental programs.

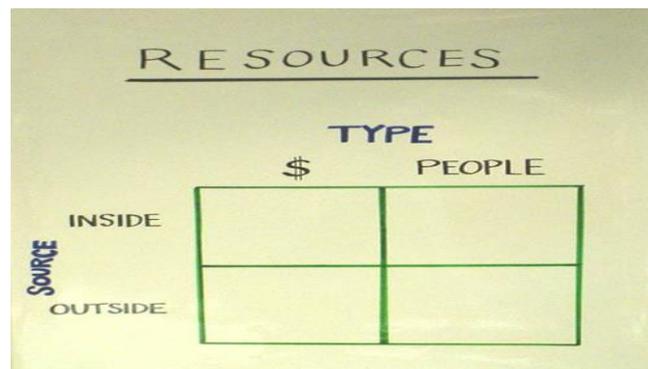
Chart #1



Similarly, devising tactics that require lots of money, if what you have is lots of people, can impose severe constraints on what you do. Basing your action program on tactics that require mobilizing people, on the other hand, can most directly empower your constituency, but it can constrain you to find tactics in which your people are willing to take part.

Although an organization can mobilize resources in a variety of ways, its center of gravity rests somewhere in the area described by Action Chart #2. If the center of gravity is in the inside/people box then it empowers the constituency, makes the organization accountable to the constituency, and limits the use of resources to the constituency's interest. One example is a union. On the other hand, if the center of gravity is in the outside/money box, then it can disempower the constituency (unless it is outside), make the organization accountable to its funders, and limit its tactics to those consistent with the interests of its funders. One example is a foundation funded service program.

Chart #2



Finally, action programs that generate resources must be distinguished from action programs that drain resources. In union organizing, for example, the more successful the union, the more members it gets, the larger the dues base, the more leadership it can develop, and the greater its human and financial resources. Similarly, as some community organizations conduct parish renewal work among member churches, their human and financial capacity grows. Grant-based action programs, in contrast, often fail to generate new resources from the work they do - and keep themselves in a state of perpetual dependency.

The beauty of the grape boycott was that it was an action in which everyone could play a part - from a person who shunned grapes in a Florida supermarket, to a student who dropped out of school to come to work full time for the UFW, and everything in between. At one point in 1975, pollster Lou Harris found that 12% of the American public - some 17 million people - were boycotting grapes. The wider the opportunity to act, the wider the participation and the responsibility.

Action entails cost -- time, effort, risk, and hard work. Sacrifice can also be widely shared. The more widely it is shared, the more people have a stake in the outcome. The boycott is a good example of this as well. When one or two people do all the "sacrificing," they quickly become "burned out," while everyone else blames them for whatever goes wrong.

The flip side of shared sacrifice is shared success. When many people have an opportunity to contribute to the effort, they also share in its success. It is "their" victory, not someone else's victory. This, in turn, creates motivation and a sense of entitlement that facilitates accountability. The day after we won the Pelosi for Congress campaign in San Francisco, 15 Filipina women who had served as precinct leaders showed up at the campaign headquarters looking for Nancy (Pelosi). They had turned out her vote very effectively and played an important role in the victory. They had won, they said, and now they had come to find "Nancy" to get help on the immigration problems they had. This was exactly as it should be. It had been their work, their victory, and now they were entitled to enjoy some of the fruits of success.

There is no right or wrong answer to what an appropriate relationship between resources and action should be. Understanding the relationship is essential, however, so you can make conscious choices about how to set up your organization so it has a chance to accomplish its purposes.

Creating a Culture of Commitment

Outcomes, Commitments, Time, Contingency, Coordination

Regardless of whether one mobilizes resources from the inside or the outside and regardless of whether they are used to promote collaboration or make claims, there is a big difference between making something actually happen, and hoping, wishing, or dreaming that it will happen. One of the most common hazards in organizing is dismissing a strategy or a tactic because “we tried that and it didn’t work” when, in reality, it was never tried – not really. We called the meeting, but hardly anyone came. Oh? What was your attendance goal? Did you make a list of the people you wanted to come? Did you get a commitment from each of those people to come? Did you learn from your successes and your failures what you had to do to get a commitment? Did you follow up with reminder calls, especially on the day of the meeting? Did you get a list of who did come? Did you find out who had invited them? Did you compare their performance to that of others? Did you learn what made the difference?

Engaging in effective collective action poses particular challenges that require greater craft than if you were a “lone ranger” operating off by yourself somewhere. Moving significant numbers of people into coordinated action requires doing detailed thinking, anticipating contingencies, providing accountability and support, conducting training – all “craft” activities that need to be viewed as being as central to the action as the action itself, or there’s likely to be no action.

Unless you can answer these questions not only about a meeting, but also about every link in the chain of contingencies that turns resources into action, there is no “craft” in your work. It becomes almost impossible to evaluate the quality of your strategy, because your “craft” – the excellence with which you do things – is so poor. In order to bring “craft” to your organizing work, it is important to focus on the following: measurable outcomes, numbers of specific commitments, deadlines, and responsibilities.

Measuring Outcomes

What are the **measurable outcomes** you will accomplish and by when? Without clear outcomes, your team doesn’t know if it succeeded or failed in doing what it committed to do. As Fred Ross once said, if you can’t count it, it didn’t happen. How many votes will it take to win the election? How much loss must a company suffer for our boycott to succeed? The ancient war strategist Sun Tzu speaks about the importance of measurement in the pursuit of one’s goals:

The rules of the military are five: measurement, assessment, calculation, comparison, and victory. The ground gives rise to measurements, measurements give rise to assessments,

assessments give rise to calculations, calculations give rise to comparisons, and comparisons give rise to victories.²

The measurement of outcomes allows a group to assess, concretely, what is happening. Assessment allows a group to calculate how it is doing over the course of time. Have we secured as many votes as we had planned to secure at this point in our work? Calculation, in turn, allows one to compare one's own outcomes with those of the opposition, or of previous efforts. If we continue at this rate, will we be victorious? What must we do in order to win? These sorts of comparisons, in turn, allow a group to continue or alter its course so as to ensure victory.

Measurement also allows us to learn by making visible who among us is succeeding, who is failing, and why. Who persuaded more people to sign up? Who was not able to persuade as many? What can we learn from this comparison? In other words, how can every organizer perform at the level of the most successful ones?

Similarly, concrete outcomes allow a group to focus clearly on the specific actions that it must take in order to produce these outcomes, and – in turn – what activities unrelated to the outcome can be eliminated. Without measurable outcome goals, it is easy for a group to lose focus, to be unclear about its goals and therefore, unclear about what actions it must take.

Creating measurable outcomes allows us to take control over our goals. Having measurable outcomes – turning out 25,000 votes, for example – lets us focus on something we can control. It becomes both a basis for evaluation and for learning. Was, indeed, 25,000 votes enough, as we thought? Or did the other candidate win despite our turning out 25,000? In the future, what should our outcome goal be?

As we discussed in the chapter on strategy, goals are embedded within goals. Measurements should thus be associated with each goal. Take the following example from a 1990 California campaign for two environmental propositions. Organizers recognized that they needed to secure approximately 75,000 votes statewide in addition to regular voters. This campaign divided their goals into phases:

- Phase I: Kickoffs – Turn out 500 people to 7 Kickoffs across the state on Saturday, October 20.
- Phase II: Voter ID – Recruit and train 1,000 Precinct Leaders to contact 300,000 Occasional Environmental Voters and identify 150,000 supporters among them—complete by 11/2 (14 days beginning with Kickoffs on 10/20)
- Phase III: Turn out 75,000 additional environmental votes on Election Day, November 6.

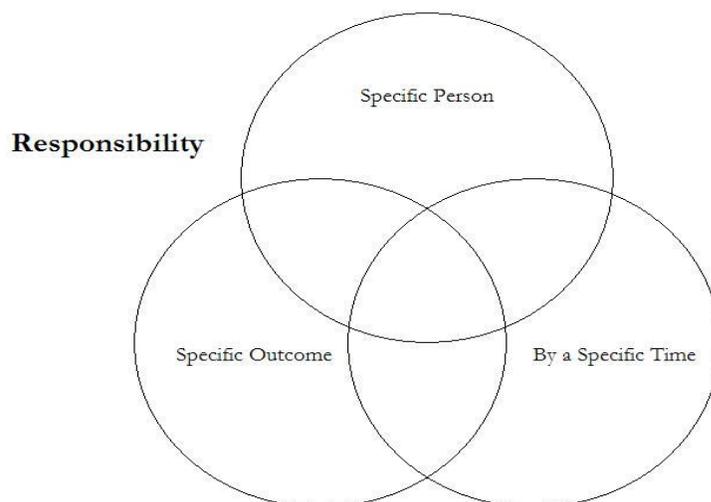
² Tzu, Sun, The Art of War. 65.

Of course, each of these outcome goals had several layers of outcome goals embedded within them – For example, how many people needed to be recruited to help turn out the 500 people on October 20, how many of those 500 people needed to assume leadership roles to recruit Precinct Leaders, how many hours did each of the 1,000 precinct leaders need to work every day in order to identify their voters.

Securing Commitments

Once we decide on upon desired outcomes we must organize ourselves to produce them. We must decide on the specific action we will ask people to take – the commitment we will ask them to make - such as signing a pledge not to eat grapes, making your own salt, not riding the bus, etc. To secure the participation of a large number of people, we must delegate the responsibility of securing these commitments to a wide range of leaders or potential leaders. One of the greatest challenges organizers face is in learning to ask for – and get – commitments. A commitment is a specific pledge of time, money, or action. Even if we are asking for a commitment to future action, however, a commitment will be stronger if a pledge to take the action is signed now. “Can we count on you to be at our meeting at 7:00 PM? Great would you mind putting your name and phone number down on the list so we can be sure how many chairs to put out and so we can give you a reminder call? I’ll try, I’ll do my best, maybe I’ll be there don’t count as commitment. The genuine commitments we secure, then, become an indicator of the outcome we will achieve.

Chart #3



So there is a big difference between putting the word out about a meeting and getting commitments from people to attend. Unless organizers and volunteers ask for and obtain commitments to attend – in writing, if possible – meeting attendance will be a “crap shoot.” This is challenging because we fear being rejected, and we often fear placing others under obligation, because it obliges us as well. Whatever the reasons, it takes courage, training, and dedication to develop a team of leaders who are not afraid to ask for and get commitments. Without this, the “action” will remain always just a little out of reach.

Finally, there is also a big difference between making commitments and keeping them. Many of us have experienced saying we will arrive at 10, but instead we arrive at 10:15. We say we’ll get something done by Thursday, but don’t have it done until Friday. When we break commitments, even in small ways, the commitment itself begins to mean less for us and for others who are counting on us. We say we’re going to be somewhere by a certain time, while knowing we’ll likely be later. Within an organization, failure to honor commitments has a negative exponential effect. If commitment stops meaning very much for me, when I commit to organizing 2 house meetings per week with 15 people at each, am I really going to think that I’ll be able to? And if I don’t think I can, how hard will I work towards this goal?

Managing Time

The way we organize our time expresses our priorities. Whatever we say, how we spend our time is what we actually do. This is so because often time is our most valuable resource, especially collective time – time in a meeting, in an action, at a rally, etc. Gandhi is reported to have said that a “deal without a date is not a deal”. In other words, it is not only a question of what you will do, but the date by when you will do it. Deadlines are not only a way to coordinate; they are a way to create the urgency that it takes to give action the priority it requires to get done. Without deadlines, there is no urgency and, as a result, it is very unlikely that what you set out to do will happen.

How we prioritize time within a campaign affects the value organizers place on their work. In campaigns in which meetings never start on time, if they are held at all, in which some people’s needs trump everyone else’s, in which meetings people prepared for get cancelled, pretty soon, no one believes their work has any value, except for a few at the top. This can be deadly for a volunteer effort, where organizers have to persuade volunteers of the value of their contribution, but themselves feel undervalued.

Managing Contingency:

Reminder Calls

The world of organizing is a world of contingency...everything can go wrong. Someone forgets to unlock the hall, the sound system is missing a cable, someone forgot to order the chairs, the map got printed backwards, half the flyers didn't get printed on time, someone's car has a flat tire, the date was mistranslated in the Spanish version, etc. etc. etc. Any human endeavor has to deal with contingency. But in a setting in which inexperienced people are trying to achieve major tasks, under pressure of time and with fewer resources than they need – typical of most organizing situations – the potential for disaster is always lurking just around the corner. And much of this we can't do anything about.

But there are forms of contingency that we can do a great deal about, and it is on those that we must concentrate. For example, asking a person for a specific commitment – and getting them to sign it – removes some of the contingency as to whether they'll show up at the meeting or not. In general, one of the most important aspects of the organizer's craft is finding ways to remove as much of the contingency as possible – there will still be plenty to go around.

For example, an organizer's responsibility does not end with securing a commitment. Organizer Larry Tramutola recounts learning this lesson from master organizer Fred Ross:

Pointing to the chart and handing me a colored marker, he told me, "Write down everything you have to do each day. Who are you meeting Monday?"

I went over to the butcher paper and wrote down the names and times of the three people that

I was supposed to meet that day.

Fred continued, "OK, now when are you calling these people to remind them that you are coming to see them?"

Remind them I was coming to see them? "I hadn't thought of that," I told Fred. "Well, write that down," he stated firmly. "Reminding is the essence of organizing."

He went over to [the] butcher paper and wrote in the Sunday column: 'Make reminder calls to:' Then, he listed the names and phone numbers of the people I was to visit the following Monday.

The lesson continued. "What time are you calling them?" he asked, and before I could answer, he instructed me, "Now write down the time." I did.

But he was not through with me yet. "OK, now on Monday, before you meet with them, you need to call them again, right?" Fred asked.

I just nodded quietly while privately thinking that all this reminding and writing down was a bit of overkill. It was only weeks later that I came to understand that these details,

and the discipline to put them into practice, are absolutely essential to good organizing. At the time, though I had not learned that for myself, and I certainly did not want to challenge Fred, so I said nothing.

Fred went on. “Good. Now write on the butcher paper the time that you plan to call them, so you don’t forget. It is always good to call people right before you visit them, so you don’t waste time if they are not there.”

And by the way, he continued, “While you are at the house of one of the people on your list, ask if you can use their phone to call your next appointment. That way they’ll see how serious you are,” he said.

He goes on to reflect on Fred’s coaching:

When volunteers who had promised to come to help pass out leaflets did not show up, he would say, “I’ve *told* you that you need to remind people to come. When you are not successful organizing, *you* need to take the responsibility. It is not their fault they didn’t show up. It’s *yours*. You either didn’t do a good enough job inspiring them, or you didn’t follow up and let them off the hook. Either way it’s your fault.”

Of course, Fred practiced what he preached, holding himself responsible for ensuring Larry’s success as he held Larry responsible for ensuring that others made good on their commitments. Tramutola recalls being coached at the end of each day by Ross:

We started every call with what I had accomplished during the day. He peppered me with probing questions that demanded thoughtful answers and accountability: “Why did you do that?” “What did you say when he said that?” The interrogation went on for two hours and often longer, as I had to report and relive my successes and failures of the day. Fred asked me one question after another, and unless I was prepared to simply hang up and walk away from what I was doing, there was no escape or relief. But I endured the torment, partly out of pride and partly because I knew Fred was teaching me invaluable lessons about the importance of follow-through and disciplined work.³

Good coaches know what questions to ask, and know when they are not getting complete answers from those they are coaching. In different organizing situations, there are different questions that are important to ask, and different ways of recognizing when people are bullshitting.

Coordination

³ L. Tramutola, (2003), Sidewalk Strategies: Seven Winning Steps for Candidates, Causes and Communities, (Turnkey Press), 39

Bringing all these elements of collective action craft together – outcomes, commitments, responsibility, time, and coaching all takes coordination. And coordination requires coordinators, a schedule, and measures. Those responsible for providing leadership must make the time to meeting before and action, during an action if need be, and afterwards to evaluate the action. Managing an effective team means scheduling time for the team to meet, to receive training, and for its members to receive one on one coaching as needed.

Coordination also requires benchmarks to evaluate – and adapt to – results. Where are we, in terms of our goals? How might we need to adjust our behavior in order to achieve our measurable outcomes? Who is doing well? Who is doing poorly? How might we need to adjust our measurable outcomes given what has happened over the last period of time?

This also means organizing space to reflect the goals of the group. Paul Milne discusses the importance of organizing physical space in such a way that the focus of the organization is on outcomes – for example, the number of votes secured through phone calls and house meetings is turned into a large chart that hangs in the line of sight of anyone who enters headquarters: “When you walk through an organizing office, it ought to remind people of what needs to be done, what’s important, what things should happen next. The place should have an orienting effect.”⁴

Perhaps most important for coordination, however, is a regularly scheduled coordination meeting that can serve as an “eye” in the hurricane, the order at the core of what can feel like a chaotic enterprise. For this to work, however, it must be sacred. When I was coordinating Nancy Pelosi’s first campaign for Congress in 1987, I was looking for an opportunity to establish this practice. We had just begun our daily coordinators meeting when someone came running into the room shouting, “Nancy’s on the phone! Nancy’s on the phone! She’s got to talk to you right away!” All eyes turned to me. Was our time really sacred or not? “Please tell Nancy that we’re in our coordinators meeting”, I said. “I’ll call her as soon as we’re done.” A big sigh of relief. From that point on, we never had any problem sticking to our daily meeting.

Motivating Engagement

(Commitment, Effort, Learning)

Since action is ultimately what organizing is all about – changing the world – it’s remarkable how often we turn the work of action into a test of how committed we are rather than an opportunity to enhance motivation, deepen commitment, and create opportunities for leadership development.

⁴ Interview with Paul Milne, (2005), July.

- You've been doing well at recruiting new volunteers but they only show up to phone bank once or twice and you never hear from them again? How can you keep them coming back?
- You have one person who "always" runs the tabling operation but they're gone for the year. How do you replace them? And, come to think of it, they and a couple of their close friends are the only ones who ever show up to do tabling. Could this be an opportunity?
- It gets pretty tiring, having to tell everyone exactly how to do their work – whether it's the check-ins for a conference, getting the food lined up for a celebration, planning for a hearing. How come I always have to tell everyone exactly how to do these jobs when they ought to know how to do it? People just don't care, do they?

You can meet these challenges by making your leadership team learn how to design tasks that insure high quality work by making full use of your resources that motivate those who perform them, and that create more opportunities for leadership development.

How does motivational task design work?

Social scientists have found that tasks designed to yield "intrinsic" rewards (inherently satisfying) produces greater motivation, commitment, and adaptive learning than tasks that only yield financial, recognition, or status rewards.⁵ When designing tasks for volunteers this is even more important.

All three conditions that make for motivational task design must be present:

- Experienced meaningfulness: the task is important in the overall scheme of things.
- Experienced responsibility: how well the task gets done is up to me.
- Experiences results: as I do the work I can see whether or not I'm doing it well.

These conditions can be established by designing tasks in the following ways:

- Task significance – understanding and recognizing the impact of the work on the world.
- Task identity – one's own contribution, from start to finish, is clear in the final result.
- Skill variety – engaging a variety of skills, including heart, hands, and head.
- Autonomy – having the space to make competent choices about how to do the work.
- Feedback – results visible to the person performing the task as they perform it.

⁵ Hackman and Oldham, 1980

Using this guide as a diagnostic we can evaluate tasks to determine how motivational they are, redesign them to make them more motivational, and construct them so as to create a leadership ladder, opportunity for people to earn greater responsibilities.

Evaluating an Action Program

Finally, we can evaluate the efficacy of our “action” program in three ways:⁶

- *First, does it solve the problem at hand?* Did you get done what you set out to do? Are there more books in the school, for example? Did more money get allocated for environmental protection?
- *Second, does it strengthen the organization?* Did it deepen understanding, build relational commitment, and generate new resources?
- *Third, does it facilitate the growth of individuals who take part in the action?* Did people learn, did they gain confidence, were they energized - or were they completely burned out?

Chart #4



⁶ Hackman, Leading Teams. 22-25.

Conclusion

Returning to Cesar's house meeting, an event at the beginning of his efforts to build the UFW, let's reexamine the tactics. What were the relational tactics he used? What kind of interpretive tactics did he use? And what kind of action tactics did he use? The goal of the work we have done over the last three weeks is to see how these three kinds of tactics can be woven together in effective organizational strategies - of which this house meeting is an excellent example.

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QUESTIONS

1. What is the “action program” of your project? Be very specific. What are new participants asked to do?
2. Where does your organization get the resources it needs to carry out its action program? Does it draw more heavily on people, money or both? What impact does this have?
3. How are you creating a “culture of commitment” in your action program?
4. Using the diagnostic checklist, how motivational is your action program? Does it create opportunities for leadership development?
5. Evaluate your action program using the three questions from Hackman: Does it solve the problem at hand? Does it strengthen the organization? Does it facilitate the growth of individuals who take part?