



A Guide To Engagement Organizing



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We are united by our love for nature. Yet, what really makes our organizations work is people. We rely on people to volunteer, to donate, and to use their voices on issues we care about. The more we engage people in our mission, the more we can get done.

The good news is that it's never been easier to find like-minded others with whom to forge common cause. The internet has complemented more old-school methods of meeting people so that today the barriers to making new friends and recruiting new supporters are quite low.

But the bad news is that many of us aren't doing enough to truly involve people at a bigger scale. The way we set our organizations up often features a small core group of people doing most of the work and wondering how to raise enough money to hire more help. Or, if we do have staff, we rely on them to do the work and forget to meaningfully involve others.

Engagement organizing is a possible solution. It is a method that combines tried-and-true practices of systematically inviting people in, with new ways of using the internet and data to do things more efficiently and at larger scales. This brief guide introduces you to some engagement organizing basics, and points to more resources should you want to go deeper still.

Part of the philosophy is trying things out to see if they work for you. Not everything will, and that's ok. Failure is one of the best teachers if we're open to learning from experience and adapting. But, we'd like to encourage you to think boldly, take risks, and challenge assumptions. In particular, challenge "the way it's always been done." Sometimes the biggest thing standing in our way is ourselves. Let's begin by turning inwards before we explore more tactical aspects.

"Engagement is to the 21st Century what advertising was to the 20th Century"



1. Redefine “Doing”

The first recommendation for engagement organizing is both the easiest, since you have full control over it, and the hardest, since it asks that you shift something about yourself.

If you are reading this guide, and if you are helping to run a group, then you may be what many consider to be a “Type A” personality – someone who likes to get things done. You are a doer of tasks, a hard worker who people rely on to follow through on the many things that are needed, often without being asked.

These kinds of people are usually the backbone of organizations. And, there are also usually too few of them, which can lead to feelings of being overwhelmed and even burning out.

Type A people have a tendency to want to jump in and get the thing done quickly, even if that means doing it by themselves, or sometimes being less tolerant of others who don't do it right or fast enough. Lost in that scenario, though, is the opportunity to engage more people in the work, and to identify and train those who show promise, even if they are not perfect.

The recommended shift in thinking for engagement organizing is to invest at least as much time and effort in recruiting and cultivating others to help do the work as doing the work yourself. Yes, this means tolerating more messiness and slower movement in the short to medium term, but if done well it means more skilled hands in the long term and a big jump in the ability of your organization to accomplish more.

There are various ways to describe this mindset. One is called “servant leadership” where you see your primary focus as helping others. Here we draw on the practice of community organizing where Marshall Ganz defines things this way: “Leadership is accepting the responsibility for enabling others to achieve purpose in the face of uncertainty.” Either way, the core of the practice is to help lift others up in a manner that cultivates their skills and leadership so that they carry the mission and work of the organization. You emphasize your role as a coach, a facilitator, and a mentor.

This cultivation is an ongoing process – it's never over, even when it's the new leaders themselves who ultimately take your place and become the developers of others. To do this in practice, there are methods and tips gleaned from experience that can be learned and deployed by anyone from small volunteer groups to big-budget organizations.

But, it all begins with a mental shift that can be difficult to make since it may challenge your very personality. You will know if you've made the shift when you set ambitious targets for things like new volunteers and leaders, and then hold yourself accountable to those numbers by investing time and effort in meeting them. You will know when you have made the shift when the core team of your organization is growing.

“Leadership is accepting the responsibility for enabling others to achieve purpose in the face of uncertainty.”

- Marshall Ganz

2. Find (& Log) Your People - Recruitment

After making a mental commitment to a true organizing model where you are cultivating others, your next step is to find your friends, the people to recruit to play some role in your organization, whether they are volunteers, leaders, donors, members, or supporters.

So, who already shares your goals, values, or interests? And, who could potentially share them with a bit of effort? You may already know some of these people personally, at least by name. Or, you may still need to meet most of them, even though they are 'out there' right now.

Here's a critical point: finding your people includes logging their name and at least one way to contact them directly such as a phone number, email, or address. You haven't really found them if you can't reach them reliably. A key part of engagement organizing is building and maintaining contact lists.

There are many ways to find your people, and you should use several of them simultaneously. If you have a few people in your group already, get together to brainstorm about everyone's personal contacts and whether you already know people who might like to be involved if you asked them properly.

Also, hold public events like outings, movie nights or speaker series and have people sign in with their name and contact information. Mix those events up rather than doing it the same way each time, and partner with other groups to get a diversity of people showing up.

People enjoy feeling like they have made a contribution, so events and outings could have an aspect of 'work' such as citizen science or litter clean up. If you are collecting data from citizen science, be sure to collect contact information so that you can thank people and invite them to do more with you.

Grab a clipboard and sit in a farmers' market or any place people gather and talk to them directly. Get a friend and go knock on people's doors. These are all tried-and-true methods of making contact. Talking to people face to face has been shown to be the most effective way of building relationships.

These days it's also possible to first find your friends online. You can create and share online petitions on issues your group works on that result in contact lists of like-minded people. (Remember if you use commercial tools like Change.org for petitions, others will have access to your lists too, which may come as a surprise to those signing).

Most people are on Facebook and you can start a group or page there and invite people to join, and for a modest sum you can advertise it to people of similar interests and to people who live just in a specific area. There are other online services like Instagram, Twitter, and Meetup.com. This list is by no means exhaustive, and there are new online services all the time that provide opportunities for first contact at low or no cost. If you are uncomfortable with online tools, ask someone to help you.

Whatever method you use to find your people, you need to give them at least an initial reason to opt in. Why are they giving you their contact information? It may be enough to say you will keep them informed on issues and events, particularly if you have a newsletter or e-newsletter to subscribe them to. Or, we've already mentioned petitions, which are an efficient way not just to raise awareness about an issue, but to develop a contact list.

Last, but not least, is the matter of inspiration. The mechanics of finding your friends are critical, but why should they care enough to sign up? Helpful here is to tap into your own inspiration, why you are doing this work. What is the story of your first involvement, and can you tell that to them? Be as personal as you can, using values rather than facts and figures. What aspect of your story relates to them and what is the reason you are asking them to sign up right now? Storytelling is a powerful way to make connections and to inspire others to come aboard.

3. Design Diverse Engagement Pathways

By finding your people, you are developing your pool of potential supporters, donors, and future leaders. Each person is unique and will have their own preferences about how they might want to engage with your mission. Your job is to start where they are at, and provide a variety of pathways to deepen their involvement over time.

Some find it helpful to think of this process as a kind of ladder or pyramid of engagement, where a certain number of people are graduated progressively to higher order tasks – for example an event participant becomes a volunteer, a newsletter subscriber becomes a donor, a small donor becomes a bigger one, or a volunteer becomes a board member. Good organizations map this out and measure it to track their progress. All organizations should be asking people to step up consistently and systematically.

Organizations can limit themselves by becoming too focused on having people join them as official members. The membership model is falling out of favour as people today prefer to affiliate based on activity – volunteering, donating, using their voice – rather than ‘joining.’ This is true across issue areas and across the world. As a result, organizations need to be mindful that cultivating and stewarding supporters will probably become a larger part of their operations than cultivating and stewarding members.

The act of asking people to step up is a skill that can be learned and improved. First, remember that you are giving people an opportunity to do good and feel good when you ask them to participate, rather than imposing on them. Then, the more personal we can be when asking – face to face or on the phone – the better. And, the more specific we can be about what is being asked, the better. People will sometimes say “no,” and that’s ok. It comes down to the volume of asking. It’s good to get comfortable with asking frequently.

People are more likely to say “yes” if they see how their donation or their volunteer time adds up to some kind of success. This is often called a “Theory of Change” and it’s not just your volunteers or donors who need to hear it, but something you need regardless. What are your goals and how are you going to meet them? What is the practical pathway that your supporters could own a specific part of? The more you have a plausible and inspiring answer to that, the more support you will cultivate by saying it out loud.

Finally, remember to build in fun. Nobody wants to join the army of the glum!

*“Remember to build in fun. Nobody wants to join the
army of the glum!”*



Green Teams of Canada

Green Teams of Canada believes that sometimes people need a reason to be out in nature and want to feel a sense of accomplishment, so it recruits thousands of people for fun work-based outings like broom bashes, litter cleanups, and community garden plantings. It makes extensive use of the internet, including Meetup.com, Facebook, Instagram, and its own email list. The volunteer experience is the centre of it – signing up is made easy and participants are thanked with a personal picture of them in action. All this requires good data management, with people logging into events on their phones or on a tablet. Says Executive Director Lyda Salatain, “We want people to realize they can make change and have an impact.”

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- Lyda Salatain

4. Create Teams, Surface New Leaders

As you pass the point of having several people engaged more fully, divide up your organization's work and create teams to tackle it. This serves a number of goals.

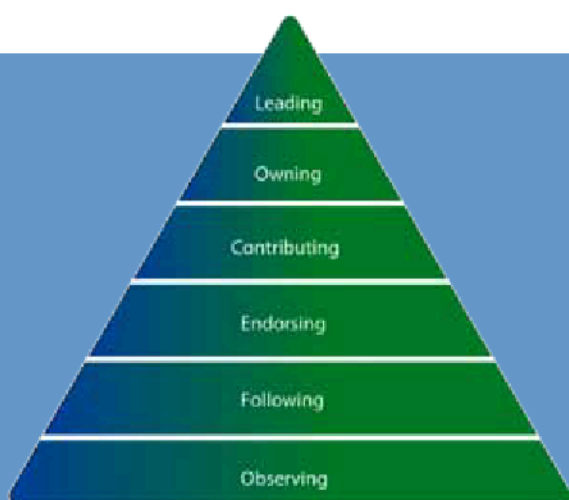
First, human experience has shown that we perform best in units of somewhere between four and 12 people. Smaller and you may lack critical mass. Larger, and there are too many personal variables and the group ends up with sub groups. A small, cohesive team lets everyone participate fully and lets members hold one another accountable for getting things done.

Second, creating teams – provided they are given good autonomy – creates the opportunity for leaders to step up. Rather than being told how to do something, if a team is given a goal and the freedom to figure out how to meet it, team members will build their agency by making those decisions together. Also, within the team, one or two people will emerge who the others look to for convening and taking overall responsibility. These are your new leaders.

Constantly identifying and cultivating leaders is a core part of engagement organizing. There is a debate about whether leaders are born that way or can be trained, but either way, when somebody begins to demonstrate leadership qualities, you want to recognize that by meeting with them one on one, thanking them, and asking them to take on more responsibility.

Within teams, roles may be identified ahead of time, or may emerge organically. Some kind of “chair” (aka team leader) is needed to ensure things are on track, and that person should be the person who team members naturally look to. Other roles will be particular to the kinds of tasks the team is taking on – maybe a researcher, an outreach person, a volunteer manager, a data manager, etc. If you like, these roles can be formalized into job descriptions, even if these aren't staff roles. Usually, people like the fact that things like this are taken seriously, since it values their investment of time. A team role, or even a team itself, may be time limited, and that can be good. Most will be reluctant to sign up forever!

While teams should have good autonomy, some structuring between teams is needed to keep their efforts on track with the goals of the organization. One method for this is called the “snowflake” model that allows for both autonomy and coherence, as well as scaling. A core organizer may help set up a few teams, and then their job is to coach the team leaders on the overall team goal. The team leaders in turn coach the team members on their individual roles. This works best when there are measurable targets that everyone can own a part of and hold one another accountable to. Note that this is a two-way street – constructive feedback is encouraged back and forth so that everyone can perform their role better.



The Engagement Pyramid

Here is a conceptual pyramid of engagement showing increasing degrees of commitment. People may enter at lower levels and be asked to do more over time. Good organizations define the levels more specifically to measure progress, knowing how many people are at each level. (For example, “following” may include people who Like your Facebook page). The goal is to establish a constant flow, from bottom to top, while increasing the numbers of people at each level.



Couchiching Conservancy

Couchiching Conservancy's Mark Bisset had a problem. Each year their annual nature gathering was drawing fewer people but still taking a lot of time and resources. So, they restructured. Instead of one big gathering they scheduled several smaller ones each run by a volunteer leader. They made a booklet advertising all the upcoming outings throughout the year that they called a "passport to nature." And guess what? Local businesses really wanted to advertise in the passport, and when they did also had an incentive to pass it around. The outings now fill up regularly and Couchiching has not only a new revenue flow, but a higher profile in the community. Says Mark about the passport, "It's one of our biggest annual fundraisers. It's a community billboard for our work. It's an entry point for new people. It's a game-changer."

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- Mark Bisset

A team member may in turn end up leading several others, in which case a new tier is added to the snowflake. As leaders cut their teeth in this model, they are invited to help make decisions in the organization, as board members or steering committee members – however governance is carried out. Give people who are investing a lot of time in your organization a seat at the decision-making table. At the same time, allow people who may be reluctant to join a board the ability to plug in with a different format.

With a good team structure in place, a person who was once directly performing many of the tasks of an organization is now responsible for coaching others to perform those tasks instead. It takes more time to set up, and some control is given up, but overall, this allows far more to be done.



The Snowflake Model

The snowflake is one model of distributed leadership where core organizers support leaders as they in turn support teams. There are clear roles and responsibilities throughout, but also a lot of independence and mutual accountability. Relationships are more about coaching and feedback than about command and control.

This diagram is based on the work of Marshall Ganz and is printed with permission from "Engagement Organizing: The Old Art and New Science of Winning Campaigns," by Matt Price, 2017, On Point Press, an imprint of UBC Press, Vancouver and Toronto, Canada.

5. Track It All

As more people establish a relationship with your organization, whether as donors or volunteers, you will need a way to track those relationships so that you can manage them properly. The better your tracking, the better your ability to be responsive to your supporters and to scale up your activities.

There's lots of talk these days about "big data," but we'll get started here with little data. Your contact list is a place to begin, and that may initially just be a piece of paper, but the key thing is to make a commitment to capturing that information and logging it somewhere. Many groups host public events, for example, and forget to ask those who come – their people – to sign in so they can be followed up with. A clipboard is one of your best friends.

When you have more than a couple of dozen contacts, a better way of tracking is needed. The good news is that today there are several free or inexpensive options for this, some of which are quite powerful. Excel is a starting option that many people already have loaded on their computers and is easy to use. As computing heads for "the cloud," Google Sheets does similar things as Excel, and allows for easy collaboration between multiple users.

As you amass emails, you will want to use a program to manage email communication. MailChimp is one such program that groups can start using for free. It not only sends mass emails, but tracks who is opening what so that you can see if people are truly responsive. It also lets you set up what's called a "drip" email program which is a series of automated emails to welcome a person to your organization

and establish the habit of communicating with you. Eventbrite is an online event management system that you can get started on for free, and collects RSVPs and entry fees if there are any.

Then, we get into databases, once the unique domain of groups with lots of money and tech skills, but today quite accessible to all. NationBuilder is a cloud-based system that is affordable and that can be learned by a layperson. It is a database, but can also host a website, set up petitions, conduct mass emailing, integrate with social media accounts, and much more. The nice thing about this is that it's all done in one place without the need to transfer data manually between systems or to have programmers set that up. Other companies are developing similar products, and it is good to keep looking around for other options as the technology continues to improve.

There are other database systems that are free or inexpensive to access but that require customization by someone who has some tech skills. CiviCRM or HubSpot are two such systems, and there are more if you search for them. Salesforce is a database that offers free licenses to charities and with the right technical support can be set up to do almost anything an organization wants to do, although the cost of customization can add up. Whichever systems you end up using, a key principle is to make sure they can integrate or talk to each other, so that you don't end up with isolated pools of data here, there, and everywhere.

Nature Trust of New Brunswick

Renata Woodward knew she needed a new database, but ended up with a whole new way of running an organization. The Nature Trust of New Brunswick (NTNB) had volunteers but lacked the systems for managing them. Then Renata attended a workshop about engagement organizing and not only adopted a new database, but also an approach that marries organizing, technology, and cultivating volunteer leaders at the heart of the organization. The transition was a bit awkward.

"Everyone felt like they were losing control," says Renata. "Our staff were used to being able to say, 'I accomplished that,' and with this shift, celebrations instead turned to 'we accomplished this by working together.'" Now, NTNB is a leader in engagement organizing and as a result does more work with dedicated and trained volunteers taking on several aspects of the organization's mission, including leading other volunteers in what's known as "distributed leadership."



Having good data not only lets you track the relationships that supporters have with your organization so that you can better serve them, but it also enables you to answer the question “What works?” For example, which mass email you sent got opened more? Which donor appeal brought in the most money? What type of events resulted in the most supporter sign-ups? You can have real numbers to answer such questions, and even get into designing experiments where you vary certain aspects of your activities to see how that changes the results.

Databases can be intimidating for those who have never used them before, but after a while, you’ll ask yourself how you ever managed to run things without one. It’s well worth the time and effort to get yourself set up.

Conclusion – Getting Started

Our organizations can always be better, but we are usually too busy with the day-to-day activities to step back, reflect, and change the way we operate. Real improvement requires a commitment to create the space for change.

Here are a few ideas for getting started:

1. Gather and reflect

Ask the people in the core group of your organization – no more than ten – to read this guide, and then host a discussion to jointly reflect how your organization currently operates and whether there are areas for improvement. Important: do not deal with any other group business at this session! Harvest any specific ideas for follow up and create a plan to act on them.

2. Stop doing

Consider creating a “stop doing list.” Your organization may simply not have the bandwidth to do things differently, so ask hard questions about whether everything you are doing is absolutely needed. What could you stop doing such that you create space to do something new?

3. Get help

Nature Canada is one of several groups that offer assistance with engagement organizing and group development. Get in touch with us or search around for others who may offer appropriate assistance. This could include overall coaching, or specialized help with things like data. Remember that you also have things to teach others as you go through this process, so consider sharing your story of change.

For more information:

Visit: naturecanada.ca/engagement

For a deeper dive, check out the book *Engagement Organizing: The Old Art and New Science of Winning Campaigns*, by Matt Price, 2017, On Point Press, an imprint of UBC Press, Vancouver and Toronto, Canada.

Nature Canada is the oldest national nature conservation charity in Canada. Its Nature Network Engagement Program aims to help nature groups across the country better engage the public so that they can better deliver their missions.

Nature Canada
Suite 300, 75 Albert St.
Ottawa, ON K1P 5E7

1-800-267-4088

www.naturecanada.ca

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