

TOOLKITS&TACTICS

Credit: Organizing for Action (OFA)

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These materials include helpful toolkits and tactics guides for a wide range of organizing activities, and training materials on organizing fundamentals. It includes the full 2013 OFA Organizing Manual, as well as guides on volunteer recruitment and management, earned media and digital organizing, managing coalition relationships, advocacy tactics guides, and grassroots fundraising

OFA Organizing Manual

This manual, written in 2013, covers essential elements of OFA—who OFA is, building strategic issue campaigns, OFA teams and chapters, methods for building capacity, and step by step guides.

- [Guide](#)

Personal story

This training reviews the ‘why’ of a personal story, elements of the personal story, as well as the five-step formula for crafting it.

- [Powerpoint slides](#)
- [Slides pdf](#)
- [Outline docx](#)
- [Example: Personal Story](#)
- [Article: Why Stories Matter by Marshall Ganz](#)
- [Worksheet pdf](#)

Connecting personal stories to issues

This training reviews how to use a personal story to talk to different audiences about issues that are important to them. By the end of this training, participants will understand why talking about issues is important and have a framework to tailor their story to different audiences.

- [Powerpoint slides](#)
- [Annotated agenda docx](#)
- [Guide to Customization: Using personal stories docx](#)

Making a hard ask

This guide walks volunteers through the mechanics of a hard ask and the best practices for making one.

- [Powerpoint slides](#)
- [Annotated agenda docx](#)
- [Worksheet docx](#)

Recruiting and managing volunteers

These materials compile best practices for volunteer-to-volunteer recruitment and management.

- [Powerpoint slides](#)
- [Annotated agenda docx](#)
- [Fellows selection toolbox pdf](#)
- [Guide to Customization: Recruiting and managing volunteers](#)

One-on-one meetings

This session defines one-on-one meetings in an organizing context, discusses why one-on-one meetings are important, and what mechanics are operating with an effective one-on-one meeting.

- [Powerpoint slides](#)
- [Annotated agenda docx](#)

Identifying and testing leaders

This training walks volunteer leaders through effective ways to develop other leaders in their community and how to identify skills and qualities that make effective leaders.

- [Powerpoint slides](#)
- [Annotated agenda docx](#)
- [Guide to Customization: Identifying and Testing Leaders](#)

Letter to the editor

This guide discusses why LTEs are an important tool in issue organizing, the nuts and bolts of writing this type of letter, and getting it published.

- [Guide pdf](#)
- [Worksheet pdf](#)

Earned media

These materials cover what effective earned media event looks like, how to pitch it to the press, and what to do to amplify the coverage.

- [Guide pdf](#)
- [Sample press advisory](#)
- [Powerpoint slides](#)
- [Annotated agenda docx](#)
- [Worksheet docx](#)
- [Guide to Customization: Earning media coverage](#)

Photography Tips

You don't need to be a professional photographer with a fancy camera to capture your events. Your camera phone combined with free apps are convenient and work well to capture the excellent photos you need to raise the visibility of your organizing online or in the media.

- [Guide pdf](#)

Digital organizing

These materials are designed to give organizers online skills for issue advocacy campaigns and community organizing.

- [Writing best practices pdf](#)
- [Using social media at events pdf](#)
- [Hashtags and handles pdf](#)

Working with coalitions

This training covers the fundamentals of coalition relations: How to find coalition partners, what a table is, and how to hold a political one-on-one. Also included are the fundamental do's and don'ts of working with partners.

- [Powerpoint slides](#)
- [Political scenarios docx](#)
- [Outline docx](#)
- [Worksheet docx](#)
- [Partner dos and don'ts pdf](#)

Choosing advocacy tactics

This module and guide will walk participants through the issue ecosystem and how understanding what motivates elected officials in the context of an issue campaign.

- [Powerpoint slides](#)
- [Slides pdf](#)
- [Issue strategy guide pdf](#)
- [Annotated agenda pdf](#)

How to host a signature drive

This guide explains the value of signature drives as a tactic to raise awareness and build support for an issue. It teaches volunteers the basics of preparing for a signature drive, best locations, how to recruit, and follow-up.

- [Guide pdf](#)

Congressional recess events

These materials walk a volunteer through the steps of different organizing congressional recess events.

- [Recess toolkit pdf](#)
- [Guide to visiting elected officials pdf](#)
- [Worksheet pdf: Townhalls](#)
- [Worksheet pdf: Office visits](#)
- [How-to docx: Congressional Office Visits](#)

Running meetings and trainings

These materials walk through the best practices of prep and follow-up while organizing a grassroots training.

- [Trainer checklist pdf](#)
- [Checking out a venue guide pdf](#)
- [Steps to a successful training powerpoint pdf](#)
- [Tips for organizing a great training docx](#)
- [Facilitation tips & tricks guide pdf](#)
- [Effective facilitation worksheet docx](#)
- [What to do after a training guide pdf](#)

Action planning sessions

This how-to walks through the basics of event planning: Why community action planning matters, how to get started, locking in logistics, and recruitment.

- [Community Action Meeting guide pdf](#)
- [How-to: Community Action Meeting docx](#)

Phonebanking

These materials guide volunteers through components of a successful phonebank and why they are so important for an organizer.

- [Powerpoint slides](#)
- [Annotated agenda docx](#)
- [Guide docx](#)

Planning a grassroots fundraising event

These materials walk volunteers through creating and running a grassroots fundraising event.

- [Powerpoint slides](#)
- [Annotated agenda docx](#)
- [Guide to planning a grassroots fundraising event docx](#)

- [Guide to customization: Planning a grassroots fundraising event docx](#)
- [Breakout exercises docx](#)

Grassroots fundraising: Making the Hard Ask

These materials cover the 'why' of grassroots fundraising and the best practices of making a hard fundraising ask.

- [Powerpoint slides](#)
- [Annotated agenda docx](#)
- [Worksheet docx](#)

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