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## **Grassroots Rising**

**Building movements for action**

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# I. It's time for big organizing

In 2015, criminal justice reform advocates in Oklahoma brought together businesses, health advocates, faith communities, and community leaders to form a politically and racially diverse coalition. The advocates had varied perspectives, political persuasions, and life experiences. But they shared an ambition to fundamentally reform criminal justice in their state. Together, they built vibrant online communities, held intense, in-person town halls, knocked on doors, and persuaded their neighbors. In November 2016, their grassroots campaign helped secure passage of two ballot measures to reduce incarceration and use the cost savings to fund rehabilitation.<sup>1</sup> Since this victory, the coalition has continued to rally a nonpartisan, inclusive, and powerful criminal justice reform movement to advance broader change.

This movement in Oklahoma is one of many that are reinvigorating civic engagement. Spanning the ideological spectrum – from the Tea Party to Black Lives Matter, and including bipartisan efforts like the one in Oklahoma – these movements have won significant media attention and popular interest. These movements remind us that the most powerful force in politics is not necessarily the special interest, lobbyist, or sloganeer, but the collective action of committed citizens.

In some ways, today's movements recall the civil rights marches and Vietnam War protests of the 1960s. A half century later, technology and social science have advanced greatly and revealed what was once invisible: the trends and tactics that coalesce social movements.<sup>2</sup> Technology now provides many more ways to engage an often wary and disaffected public by creating onramps to action and by providing greater access to decision makers.<sup>3</sup>

Today, philanthropists and professional advocates can leverage these advances to achieve broader social change. In the past few decades, philanthropists and advocates have tended to focus on **small organizing** for individual **campaigns**. These campaigns are driven by a core set of organizers – often professional advocates – who seek to mobilize enough grassroots support to secure policy change on a particular issue.<sup>4</sup> This approach is easier for funders looking to make grants to a few high-capacity organizations that seek to advance a specific policy goal. It is also natural for advocates who prefer control over tactics and have relationships with trained activists. Campaigns focused on achieving near-term policy outcomes also can seem more readily measurable and fit within foundations' theories of change.

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<sup>1</sup> KFOR-TV and K. Query. "Oklahoma Voters Pass Criminal Justice Reform State Questions." *KFOR-TV*, 8 Nov. 2016, [kfor.com/2016/11/08/oklahoma-voters-pass-criminal-justice-reform-state-questions/](http://kfor.com/2016/11/08/oklahoma-voters-pass-criminal-justice-reform-state-questions/).

<sup>2</sup> Hall, Nina and Phil Ireland. "Transforming Activism: Digital Era Advocacy Organizations." *Stanford Social Innovation Review*, 6 Jul. 2016, [ssir.org/articles/entry/transforming\\_activism\\_digital\\_era\\_advocacy\\_organizations](http://ssir.org/articles/entry/transforming_activism_digital_era_advocacy_organizations).

<sup>3</sup> Scarce, Diana, Gabriel Kasper, and Heather McLeod Grant. "Working Wikily." *Stanford Social Innovation Review*, Summer 2010, [ssir.org/articles/entry/working\\_wikily](http://ssir.org/articles/entry/working_wikily).

<sup>4</sup> Bond, Becky and Zack Exley. *Rules for Revolutionaries: How Big Organizing Can Change Everything*. Chelsea Green Publishing, 2016, pp. 3, 8–9.

"The grassroots movement at the state level is the answer to counter the partisan environment of our nation. If people can come together, work together, and demonstrate that better approach, it gives us hope that perhaps the conversation and behavior in DC and beyond will change."

-Kris Steele, *Oklahomans for Criminal Justice Reform*

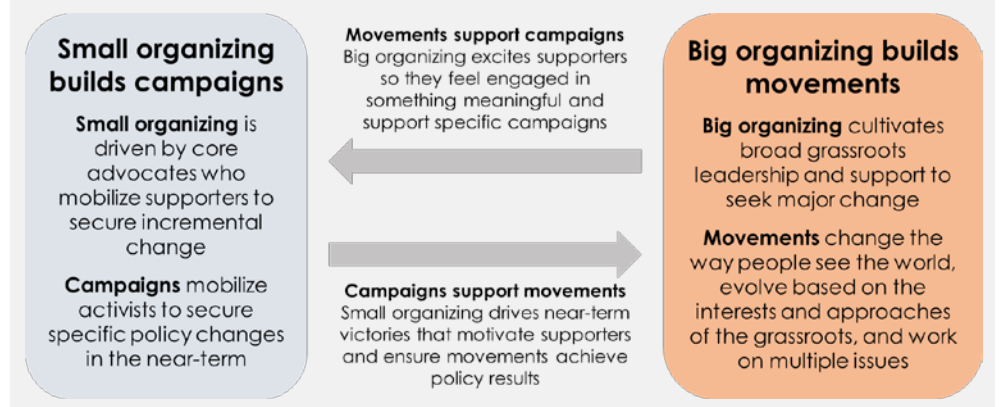
In contrast, **big organizing** aims to build more powerful grassroots **movements** by finding community leaders – who may not be outspoken activists – willing to take on leadership roles, giving them more autonomy to work toward shared goals, and supporting them to solve deeply rooted problems that may require multiple policy victories, not just one reform.<sup>5</sup>

Big organizing rarely centers on a single issue. Instead, it recognizes that many issues are deeply interconnected.<sup>6</sup> Much of the work of funders and professional advocates – small organizing – is effective. But it can be even more powerful when the same advocacy campaigns, policy goals, and technical acumen are run not as ends in themselves but as means to support big organizing that empowers communities over the long term. The criminal justice organizers in Oklahoma did not stop with their referendum wins. They are continuing to build power within their nonpartisan coalition to secure further reforms. The efforts in Oklahoma demonstrate that small and big organizing need not be dichotomous but can instead work together and reinforce one another to achieve social change.

The campaigns of small organizing are crucial to the movements of big organizing, and vice versa (see Figure 1). Campaigns do not form movements in and of themselves, but their concrete goals for reforming policies are essential for movements to achieve real-world changes. Conversely, without movements’ ability to engage the public and interweave issues through big organizing, individual campaigns may struggle to achieve their goals and forfeit their potential to sustain work on related issues.

**Figure 1**

### **The relationship between campaigns and movement building**



New digital tools and social science advances can make big organizing more effective, measurable, and tangible for philanthropy and professional advocates. Having more ways to support movements that deliver more measurable impacts should help shift

<sup>5</sup> Bond and Exley, 2016.

<sup>6</sup> Ibid.

“Movements are messy  
and often paradoxical;  
strategic yet spontaneous,  
patient yet urgent,  
visionary yet pragmatic...

Because social  
movements often appear  
to arise from the  
confluence of many  
seemingly random  
factors, it is easy to  
overlook the fact that  
they are not haphazard  
but deliberate.”

-Mark Fraley, *Leadership  
for Educational Equity*

the calculus of funders and advocates in favor of a big organizing approach to complement their traditional support of campaigns.

To make the most of these new tools, however, the nonprofit sector needs to build on what we know about the very best organizing.<sup>7</sup> In that context, the digital tools and advances in social science can transform the way philanthropic funders, professional advocates, and community organizers pursue change.<sup>8</sup>

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<sup>7</sup> See, e.g., Fraley, Mark. *History Matters: Building towards an Educational Justice Movement*. Leadership for Educational Equity, 2016.

<sup>8</sup> Holland, Matt and Michael Silberman. “Taking Advocacy Campaigns off Auto-Pilot.” *Stanford Social Innovation Review*, 9 Sept. 2016, [ssir.org/articles/entry/taking\\_advocacy\\_campaigns\\_off\\_auto\\_pilot](https://ssir.org/articles/entry/taking_advocacy_campaigns_off_auto_pilot).



“Lots of new organizers are incredible, but it seems that many don’t have a 20- to 30-year vision; it’s in the moment, not laying the base to move forward. There’s a place for that [near-term focus], but ... let’s talk about what happens between the marches, between the encampments.”

-Xavier Morales, *The Praxis*

## II. Strategic movements can win

Often seen as unpredictable or fleeting, the very best movements entail concerted action by skilled practitioners. They demand strategy and organization to deploy specialized skills at key moments. But they also require broad engagement and a willingness to shift quickly in response to what works. Appendix A offers a rundown of how movements can look and feel different from professionally-run campaigns.

If funders and professional advocates want to align with movements to advance their goals, they will need to acclimate to movement dynamics. A big, long-term vision of social change with a pithy slogan can be more effective in bolstering support for movements than academic policy papers. Grassroots energy produces often unpredictable movement moments that are ripe for change, but funders typically consult a small community of professionals and academics to spot opportunities. And movement moments rarely occur at convenient times for planning and grantmaking cycles. The good news is that funders can draw upon some of the same skills they are developing in other arenas (e.g., beneficiary voice<sup>9</sup>) to support movement building.

Ultimately, aligning policy advocacy with movement building requires long-term commitment. Foundations that operate as perpetual institutions for the public good ought to be the ideal candidates to fund and sustain long-term movements. Indeed, some foundations have been noteworthy champions of movements: the Robert Wood Johnson Foundation remains committed to building a movement around a culture of health, and the William and Flora Hewlett Foundation has supported the Open Educational Resources movement for over 15 years. In other cases, however, funders have prioritized quick wins or dropped promising efforts as their staff changed. Even three- or five-year strategic planning cycles may be too short to effectively fund and sustain movements, which can take far longer to grow before their movement moment arrives.

Investing in movements does not require blind faith. New tools are helping to build, sustain, and measure movements so they can reshape institutions and public opinion more effectively and consistently. These tools can help read signals of movement potential before movement moments arrive and make it easier to link campaigns to movements. Funders and professional advocates can rigorously assess and plan movement investments in the same way they support campaigns today.

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<sup>9</sup> Twersky, Fay, Phil Buchanan, and Valerie Threlfall. “Listening to Those Who Matter Most, the Beneficiaries.” *Stanford Social Innovation Review*, Spring 2013, [ssir.org/articles/entry/listening\\_to\\_those\\_who\\_matter\\_most\\_the\\_beneficiaries](http://ssir.org/articles/entry/listening_to_those_who_matter_most_the_beneficiaries).

## Build and activate potent movements

Four practices strengthen movement building and action (Figure 2):





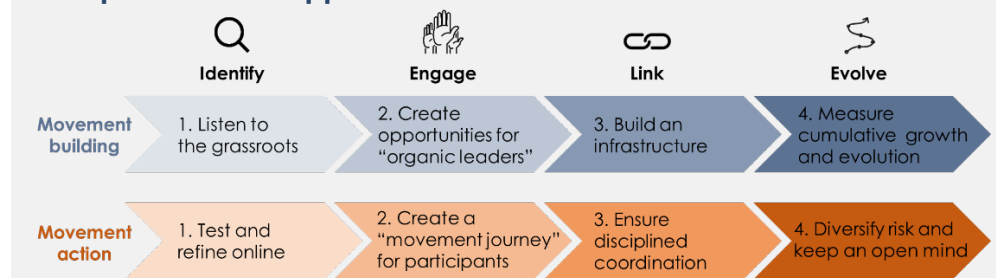
-  1. **Identify** issues, venues, and messages to change the common wisdom and improve public policy
  - **Building:** Listen to the grassroots to identify interconnected issues that create movement opportunities
  - **Action:** Take advantage of online communities to test and refine messages
-  2. **Engage** and commit ordinary citizens willing to lead and work through setbacks
  - **Building:** Create opportunities for “organic leaders”
  - **Action:** Create a compelling “movement journey” for campaign participants
-  3. **Link** issues and campaigns so the movement has tangible goals and a big, diversified vision
  - **Building:** Build an infrastructure that will link campaigns and the movement
  - **Action:** Ensure disciplined coordination
-  4. **Evolve** and remain open to new ideas even as the movement focuses on becoming more effective at pursuing current priorities
  - **Building:** Measure the cumulative growth and evolution of the movement over time
  - **Action:** Diversify risk and keep an open mind

Figure 2

### Four practices to support movements



In the remainder of this piece, we illustrate the above practices and the new tools that make them possible (summarized in Appendix B). For each of the four practices—identify, engage, link, and evolve—we discuss the strategies that funders and advocates can use to build the movement, and the tactics that can drive these movements into effective campaign action.





### III. Identify issues, venues, and messages

Both movements and campaigns must be responsive to dynamic contexts in order to design effective strategies that seize opportunities to build support. Fortunately, a variety of new tools allow advocates to quickly and inexpensively gather information about what issues, venues, and messages resonate so they can test and hone their tactics. For movement building, advocates should focus on listening to the grassroots to identify interconnected issues that create movement opportunities. For movement action, advocates can take advantage of online communities to test and refine messages in real-time.

#### Listen to the grassroots to identify interconnected issues that create movement opportunities

Movements are driven by the causes and messages that resonate with people's day-to-day lives and concerns. Because people think about themselves and the issues they care about holistically, a broad-based movement must be inclusive of a range of interconnected issues.<sup>10</sup> Traditional organizers have long understood the need to meet audiences where they are. Funders and advocates who are committed to supporting grassroots movements should reach out to understand their audiences' priorities and adjust their strategies accordingly.

New technology makes it easier to give voice to and learn from the grassroots. Online tools such as Google Consumer Surveys have lowered the cost and time intensity of survey research.<sup>11</sup> These online survey tools are increasingly valuable because response rates for telephone surveys have plummeted. For example, we conducted inexpensive Google Consumer Surveys to assess parent attitudes toward test refusal in four states and received results in days. The data helped predict where parents were more likely to opt their children out of tests, who was influential in driving test refusal, and how parents perceived standards and assessments – some of which was later validated by official rates of test refusal in New York. In the absence of capacity, resources, and time to conduct traditional phone polls, this data can be invaluable for advocates as they refine their messaging, messengers, and geographic targets.

Social media is another useful tool that helps advocates listen to their grassroots supporters on an ongoing basis. MomsRising, an advocacy group for moms and families, follows moms' discussions through "tweet chats," social media responses on Facebook, their network of over 3,000 bloggers, and feedback on messages sent to

"The effective movements I've seen have been built around more than policy change. They're built around a mission and values as opposed to just policy change."

-Todd Schulte, FWD.us

<sup>10</sup> Bond and Exley, 2016.

<sup>11</sup> Alvarez, R. Michael. "Q&A on the Use of Google Consumer Surveys for Social Science Research, with Lie Philip Santos, Robert Stein, and Randy Stevenson." *Cambridge Core*, 20 Apr. 2017, [blog.journals.cambridge.org/2017/04/20/qa-on-the-use-of-google-consumer-surveys-for-social-science-research-with-lie-philip-santos-robert-stein-and-randy-stevenson/](https://blog.journals.cambridge.org/2017/04/20/qa-on-the-use-of-google-consumer-surveys-for-social-science-research-with-lie-philip-santos-robert-stein-and-randy-stevenson/).

more than one million volunteers. MomsRising regularly incorporates new messages and issues into their policy campaigns, such as launching a police reform campaign alongside the rise of the Black Lives Matter movement. “We intentionally listen for great messaging that resonates, learning from members’ experiences, and adjusting our messages when we’ve missed something,” says Donna Norton, Executive Vice President and Chief Advancement and Strategy Officer. “It’s a very organic process – we don’t have a staid message that stays the same. We work to be in dialogue with our membership, volunteers, and audiences instead of just broadcasting messaging out.”<sup>12</sup>

At the same time, advocates must avoid being pushed too far by this new wave of data on rapidly shifting public sentiments. They should remain true to their core values, avoid overly exclusive language or messages, and leave open pathways for future campaigns. The Occupy Wall Street movement, for example, lost cohesion by attempting to incorporate too many perspectives and by failing to provide sufficient central direction for activists.<sup>13</sup>

#### Box 1

### Turning listening into persuasion

Movements can expand by both mobilizing existing supporters and persuading people to become new supporters. By truly listening to people, advocates can go a long way toward persuading the public to see the world differently. Through years of experimentation, the Los Angeles LGBT Center Leadership LAB developed a model for “deep canvassing.” Field experiments validate that this technique can significantly and sustainably change minds.<sup>14</sup>

In deep canvassing, in-person canvassers genuinely listen, make a personal connection, help opponents identify something in their personal lives related to the issue, and encourage them to deeply reflect on their experiences and views. An evaluation of the LAB’s deep canvassing on transgender issues found that “the decline in prejudice against transgender people achieved by the canvassers is comparable to the decrease in prejudice against gay and lesbian people that took more than a decade to achieve.” This is truly remarkable for “a single, approximately 10-minute conversation with a stranger.”<sup>15</sup>

This type of genuine listening is not just a technique advocates can use to persuade opponents; advocates and funders must embrace it themselves to be truly responsive to movements.

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<sup>12</sup> Rowe-Finkbeiner, Kristin. “MomsRising Together: Top Priorities for 2017.” *MomsRising*, 31 Oct. 2016, [www.momsrising.org/blog/momsrising-together-top-priorities-for-2017](http://www.momsrising.org/blog/momsrising-together-top-priorities-for-2017).

<sup>13</sup> Smucker, 2017.

<sup>14</sup> Broockman, David and Josh Kalla. “Durably Reducing Transphobia: A Field Experiment on Door-to-Door Canvassing.” *Science*, vol. 352, no. 6282, 2016, pp. 220–24, [science.sciencemag.org/content/352/6282/220](http://science.sciencemag.org/content/352/6282/220).

<sup>15</sup> Diaz, Gil. “‘Science’ Reports UC Berkeley, Stanford Study Finds Los Angeles LGBT Center’s Canvassing Conversations Reduce Voters’ Anti-Transgender Prejudice.” *Los Angeles LGBT Center*, 15 Apr. 2016, [lalgbtcenter.org/about-the-center/press-releases/science-reports-uc-berkeley-stanford-study-finds-los-angeles-lgbt-center-s-canvassing-conversations-reduce-voters-anti-transgender-prejudice](http://lalgbtcenter.org/about-the-center/press-releases/science-reports-uc-berkeley-stanford-study-finds-los-angeles-lgbt-center-s-canvassing-conversations-reduce-voters-anti-transgender-prejudice).

“We see a social continuum as opposed to online versus offline.

You see some of the same social interactional qualities in the real world and online. There are sets of central actors, cliques of people, brokers, etc.

In the online social space, we can do large-scale experiments and get data back quickly. You can see how information moves not over the course of months or years, but rather days.”

-Alan Daly, #commoncore Project

## Take advantage of online communities to test and refine messages

Organizing has always thrived on sharing stories that relate key issues to people’s lives and on demonstrating power to instill confidence in movement members. Personal stories and demonstrations of power help shift a movement into decisive action on policy. In both cases, the emergence of social network analysis and digital communications have created new ways for movements to more swiftly and cost-effectively identify the stories that resonate and to test if the movement is ready to run successful campaigns.

New media enables advocates to quickly identify the most compelling stories, disseminate them through virtual communities, and take calculated risks to advance the symbolic contest. Stories relate abstract policy goals to movement members’ experiences. They are one of the key ways to lend personal meaning to movements and build an advantage in the symbolic contest. For example, MomsRising relies heavily on storytelling to mobilize and persuade in a way that abstract numbers and facts cannot: “Moms trust other moms, which is the power behind the explosive growth in the mom activism and blogging community,” says Monifa Bandle, Vice President and Chief Partnership & Equity Officer. “We use stories both to persuade policymakers but also as a way to engage and build the leadership of moms.” This online outreach is also an efficient way to test stories for use in broader offline actions: “We usually take whatever messaging we see works online and use it in our physical printed materials and talking points,” Bandle explains.

Compared with campaigns, movements add a layer of complexity in choosing which stories to elevate at any given time. Movements must balance their near-term goals with fighting the long-term symbolic contest. Kris Steele of Oklahomans for Criminal Justice Reform recounted times when he worried that pushing out a story through social media – for example, a message focusing on faith versus a health- or business-oriented message – could harm support for Oklahomans for Criminal Justice Reform among certain audiences. But his coalition partners countered that the story was an essential perspective to share, even if it might make some people uncomfortable. Because social media is inexpensive and enables the frequent release of new content, any individual action is generally lower stakes than traditional campaign tactics, such as television ads. Social media helped Oklahomans for Criminal Justice Reform “find the balance of elevating the issue and using it to educate the general public, but not hindering our opportunity to be successful at the polls,” Steele says.

Online tools also offer new ways to conduct simple demonstrations of power as a movement emerges. Demonstrations of power, or “structure tests,” are lower-stakes ways for movements to convince themselves of their efficacy, steeling them for more intense campaigns. These tests carry the risk of reprisal due to their public nature, but success in the face of shared risk builds confidence.

## Box 2

### Building on decades of organizing experience

The Congress of Industrial Organizations, a labor union that merged with the American Federation of Labor in 1955, offers some classic best practices in organizing that remain relevant today. For example:

- **Work on interconnected issues:** CIO organizers believed in looking beyond immediate workplace issues and “anchoring campaigns in the ‘whole worker,’ understood to be a person embedded in a range of social relationships in the workplace and in the community.”<sup>16</sup>
- **Intentionally develop organic leaders:** CIO organizers grew the labor movement by investing heavily in identifying the right leaders to join and help expand their membership.<sup>17</sup>
- **Conduct structure tests:** Union organizers staged intermediate actions as they built toward unionization votes or strikes to “gauge how effectively and efficiently ... an organic leader can get a majority” of movement participants to take an action. If successful, unions organized harder tests, such as “getting ... a supermajority of workers [to] come to work wearing a union sticker or button.”<sup>18</sup>

New tools and approaches can be integrated with these three practices.

Because online engagement requires less commitment, any given demonstration online is less consequential. However, online demonstrations can be valuable preliminary indicators of strength. When sustained or replicated, they can add up to a major action. Advocates can use hashtag campaigns or retweet efforts as the online analogue to the labor organizer’s workplace sticker day. To make an online structure test truly meaningful – with real stakes – it must be personal and require people to stake a claim to their position in public, whether via personal Facebook pages, online petitions with names and addresses, or personal stories on blogs.

Advanced technology has made it crucial for movements to ensure that their online structure tests represent real grassroots supporters. Some apparent movements have deployed “bots” – technology that automates social media posts, often through the use of multiple accounts – to artificially inflate the perceived size of their grassroots base and opinion. Most of the time, these bots operate under the radar, but social network analysis coupled with large-scale data mining makes it easier to identify bots. Movements that depend on these bots may ultimately suffer when their inauthenticity is discovered and the apparent online fervor generated by this technology does not translate into broader grassroots action. As we grow more accustomed to bots, policymakers will look for more authentic demonstrations of a movement’s size and enthusiasm, such as office visits and phone calls.

The first social media analysis of the conversation around #commoncore did not identify the widespread use of bots by Common Core opponents. But a second

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<sup>16</sup> McAlevy, 2016.

<sup>17</sup> McAlevy, 2016.

<sup>18</sup> McAlevy, 2016.

analysis that dug deeper into the data found bots responsible for much of the conversation – a finding that could have damaged the anti-Common Core movement’s reputation in traditional media and helped advocates for college- and career-readiness better target their authentic outreach.<sup>19</sup>

### Box 3

#### Handling the rise of “fake news”

Social media enables people to easily share content that has not been vetted by reputable sources, leading to the proliferation of “fake news” stories across the political spectrum. The 2016 U.S. presidential election exemplified this phenomenon, spurring debate over whether and how fake news influenced the election’s outcome. Research on fake news and its impact is still nascent. However, funders and advocates should consider a few dynamics in the meantime:

- **People are more likely to trust information that aligns with their existing views and comes from sources in their community.**<sup>20</sup> It is possible that as fake news becomes a well-documented phenomenon, people will become warier of unfamiliar news sources or attention-grabbing headlines. But it is also possible that opponents may accuse each other of promoting fake news regardless of the facts, leading people to only trust those they see as already within their circles.
- **“Echo chambers” can be amplified by online communities and fake news.** Social networks and search engines personalize the content that users view based on their previous interactions, which can lead people to see only views that align with their prior beliefs.<sup>21</sup> Those who fall for fake news sources may also be subsequently exposed to more. This spiral can make persuasion efforts more difficult.
- **Fake news might make it easier for people to take online action.** Fake news is often designed to generate strong reactions so it goes viral. Movements may see more online participation in the form of people sharing these stories. Whether movements can then drive these people to engage in other ways – and with truthful information – will depend on whether they believe these fake news-driven participants should be brought into the movement and how effectively they craft their ladders of engagement.

In light of fake news, funders and advocates should be prepared for moments when potential movement participants or opponents become interested in an issue and act on the basis of false information. They will have to decide whether to devote resources to educate those people on the facts, or whether to divert attention to other opportunities without correcting the falsehood that initially attracted those people. Additionally, they must recognize the importance of reaching people through their own communities and relationships until people have built trust beyond their circles. Given the ideologically segregated and distrustful nature of many online communities, they must also invest in direct, person-to-person relationship building, both online and offline, to expand people’s trusted networks.

<sup>19</sup> Supovitz, Daly, del Fresno, and Kolouch, 2017.

<sup>20</sup> Allcott, Hunt and Matthew Gentzkow. “Social Media and Fake News in the 2016 Election.” *Journal of Economic Perspectives*, vol. 31, no. 2, Spring 2017, pp. 211–36, [web.stanford.edu/~gentzkow/research/fakenews.pdf](http://web.stanford.edu/~gentzkow/research/fakenews.pdf).

<sup>21</sup> Morozov, Evgeny. “Your Own Facts.” *The New York Times*, 10 Jun. 2011, [www.nytimes.com/2011/06/12/books/review/book-review-the-filter-bubble-by-eli-pariser.html](http://www.nytimes.com/2011/06/12/books/review/book-review-the-filter-bubble-by-eli-pariser.html).



## IV. Engage and commit ordinary citizens

While professional advocates can offer strategic expertise, organizing power, resources, and deep commitment to impact, they often cannot achieve victory alone. Strong movements and campaigns can thoughtfully and authentically engage ordinary citizens who care about and are personally affected by policy issues. At the movement building stage, advocates can help create opportunities for “organic leaders” to grow at the forefront of the movement. At the movement action phase, advocates can craft a compelling “movement journey” that allows campaign participants to engage in ways that fit their needs and interests, and that encourage them to scale up their involvement.

### Create opportunities for “organic leaders”

Movements require strong, authentic leaders who have deep relationships in communities and whose stories resonate more broadly. These “organic leaders seldom self-identify as leaders and rarely have any official titles, but they are identifiable by their natural influence with their peers.”<sup>23</sup> However, movement builders must provide “the right opportunity at the right time to help activate such latent [leadership] potential in others.”<sup>24</sup>

Online networks and communities can help identify and engage organic leaders more efficiently. Funders and advocates can examine burgeoning networks to identify individuals and organizations that: (1) have large followings within one important community, (2) connect communities and influencers who might otherwise not be engaged, and (3) are frequently engaged by other activists and community members. Early in a movement’s development, a

#### Box 4

##### Using social network analysis to identify organic leaders

Social network analysis of the test refusal movement revealed a set of early leaders who consistently drove discussion of test refusal within and beyond their states. They included not only well-known education policy advocate Diane Ravitch but also rising influencers, such as educator Jesse Hagopian, former principal Carol Burris, and parent advocate Leonie Haimson. These leaders intentionally grew and strengthened their networks by engaging on Twitter with influencers and connectors of different segments of the conversation. A study of the Twitter conversation around the #commoncore hashtag similarly found “brokers” who sat between otherwise disconnected actors.<sup>22</sup> These brokers held the power to filter information flowing among those actors and were essential as the network grew.

<sup>22</sup> Supovitz, Jonathan, Alan J. Daly, Miguel del Fresno, and Christian Kolouch. *#CommonCore Project*, 2017, [www.hashtagcommoncore.com](http://www.hashtagcommoncore.com).

<sup>23</sup> McAlevey, Jane F. *No Shortcuts: Organizing for Power in the New Gilded Age*. Kindle ed., Oxford University Press, 2016.

<sup>24</sup> Smucker, 2017.



small amount of support for these individuals can help them become leaders and rapidly scale their networks.

Mapping social networks can help funders and advocates identify and engage strong, authentic grassroots leaders who might otherwise not come into their circles or think of themselves as leaders. Funders and advocates should give those leaders autonomy and avoid proliferating new institutions in place of organic leaders. For example, a California grassroots nonprofit that organizes around affordable housing issues has historically used little social media, relying instead on in-person outreach to identify potential community members who might become organic leaders even if they did not think of themselves as advocates. However, a massive rise in online interest spurred them to rethink the opportunity to use online networks to recruit organic leaders. “Now,” says the group’s executive director, “there are enough people [online] that ... we can try to move them through the pipeline to become committed leadership in our organization.” Their early results have been enormously successful: advocate training sessions that typically drew 25 to 50 participants had 400 people, and their new online rapid response network trained more than 1,200 people in four weeks.

## Create a compelling “movement journey” for campaign participants

Traditionally, organizers have worked to move people up the “ladder of engagement,” encouraging them to get more involved by starting with small actions and promoting a sense of efficacy and community to motivate bigger commitments.<sup>25</sup> Digital campaigns can extend that ladder to people who otherwise could not reach the lowest rung. Online tools allow organizers to involve new participants, even those who are only prepared for low-level commitments. Movements can leverage even low-level participation to demonstrate power to decision makers. For example, the test refusal movement won widespread participation from busy parents and teachers who found easy opportunities to share viral social media content. As validated by actual test refusal numbers, many of these people then expanded their involvement in the movement by opting their children out of tests and talking with fellow parents and teachers.

Beyond extending the ladder of engagement, however, the new era of digital engagement calls for reinventing the ladder as a more flexible “movement journey.” As people spend more time online and social media has become a primary source of news and information, the distinction between online and offline activities has blurred. Online and offline engagement creates a two-way street. Easily accessible online actions can bring newcomers into a movement. Organizers can then work to transition these newcomers to additional offline actions. At the same time, committed offline activists can spread their message more broadly and engage with new

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<sup>25</sup> Alinsky, Saul. *Rules for Radicals: A Pragmatic Primer for Realistic Radicals*. Random House, 1971.

audiences online. Organizers should not just see online action as a transition to offline activity; instead, they should see it as one component of a more flexible portfolio of engagement opportunities. They should celebrate those who can only engage online. And they should seek to grow participation across the full suite of tactics.<sup>26</sup>

#### Box 5

### Integrating online and offline campaigns

MomsRising's comprehensive campaign to win expanded overtime pay regulations illustrates the power of a truly integrated online and offline campaign. MomsRising generated more than 25,000 supportive letters and comments. It published a report with the Institute for Women's Policy Research on the overtime rule's impacts, coupled with stories of real people and a letter to leaders signed by tens of thousands of people supporting the policy. It conducted press outreach to major media outlets. It hosted a "Twitterstorm" that made over 100 million impressions and reached tens of millions of people. And it supported moms to blog about overtime work.<sup>27</sup> When MomsRising celebrated its victory, it took care to credit all those who participated in whatever way they could, offering encouragement and a feeling of community so they would be more likely to participate in the next action.<sup>28</sup> Donna Norton, Executive Vice President and Chief Advancement and Strategy Officer, credits the diversity of opportunities with rallying so much support:

"Moms write us and say, 'I'm a single mom, I work all day, I come home and take care of kids, put them to bed, and then at 10 p.m., I get online and see there's something I can do from home that makes a difference in the world and that makes a difference in my life.' We have this incredible ability we haven't had before to engage."

Reaching Higher New Hampshire, a state education advocacy coalition, offers another innovative model for bridging online and offline action. They launched an online student video contest and invited the public to vote for the winning submissions – engaging voters with Reaching Higher's key messages in the process. The winners and their networks were then invited to in-person meetings with key policymakers. Following those meetings, in which students felt empowered to speak to policymakers, the students were asked to support the next round of the online video project, continuing the cycle of online and offline recruitment.

The movement journey perspective can help organizers ensure that their movements do not become overly focused on small, ineffective asks at the bottom of the ladder of engagement (e.g., repeatedly asking supporters to sign online petitions). Social media can be powerful, but its potential can also be squandered if organizers fail to translate that engagement into effective, evidence-based actions. Moreover, while many busy people or timid newcomers are eager for easy opportunities to engage, there are others – particularly potential organic leaders – who can only be excited by

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<sup>26</sup> Aroneanu, Phil. Purpose. Personal interview. 12 Apr. 2017.

<sup>27</sup> Rowe-Finkbeiner, Kristin. "National Moms Groups Applauds Department of Labor Rule Expanding Eligibility for Overtime Pay." *MomsRising*. 17 May 2016, [www.momsrising.org/page/moms/national-moms-groups-applauds-department-of-labor-rule-expanding-eligibility-for-overtime-pay](http://www.momsrising.org/page/moms/national-moms-groups-applauds-department-of-labor-rule-expanding-eligibility-for-overtime-pay).

<sup>28</sup> Norton, Donna. MomsRising. Personal interview. 12 Apr. 2017.

“big asks.”<sup>29</sup> For example, the Bernie Sanders presidential campaign’s “distributed organizing” model leveraged millions of online supporters to run evidence-based voter contact programs. A handful of campaign staff made “big asks” for volunteers to become leaders, empowered those leaders to build their own teams, and tailored tactics and tools to each team’s needs.<sup>30</sup> These teams’ online and offline organizing efforts were mutually reinforcing: online recruits held in-person meetings, and in-person meetings generated more e-mail addresses to add to online lists.

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<sup>29</sup> Bond and Exley, 2016.

<sup>30</sup> Bond and Exley, 2016.



## V. Link issues and campaigns

In order for movements and campaigns to be mutually reinforcing, they require deliberate effort to coalesce behind shared goals and values, as well as resources to deploy behind collective strategies. During the movement building phase, it is essential to build an infrastructure that will link campaigns with the movement. At the movement action stage, disciplined coordination between funders and advocates can channel energy into outcomes.

### Build an infrastructure that will link campaigns and the movement

A strong movement infrastructure can help campaigns succeed more consistently while bolstering the broader movement. Movement infrastructure is best thought of as offering key functions, knowledge, and strategic coordination to participants who may shift over time, rather than providing infrastructure to a static team of advocates pursuing a time-bound campaign. Figure 3 describes key components of movement infrastructure.

**Figure 3**

#### Components of movement infrastructure

| Infrastructure  | Example  |
|---|--|
| Easy-to-use tools for real-time communication and information sharing | <b>Bernie Sanders presidential campaign:</b> <ul style="list-style-type: none"><li>Used consumer tools, including Trello, Slack, and Google Docs, to facilitate grassroots coordination (Bond and Exley 2016)</li></ul>  |
| Evidence-based recommendations for messaging and tactics              | <b>National funders for college- and career-ready standards:</b> <ul style="list-style-type: none"><li>Invested in a variety of grantees for research, message testing, and strategic coordination</li><li>Conducted polling and research and shared information across their network of national and state groups</li></ul>   |
| A database of allies and stories                                      | <b>Achieve Coalition Support Network:</b> <ul style="list-style-type: none"><li>Facilitated ongoing connections among state advocates, national partners, and funders working on college- and career-ready standards and assessments</li><li>Created an online platform for state advocates to share lessons, materials, and stories</li></ul>   |
| Replicable trainings for grassroots advocates                         | <b>Climb Higher Colorado:</b> <ul style="list-style-type: none"><li>Offers a group of community based partner organizations referred to as the "Alliance" trainings and additional capacity to advance college- and career-readiness policies; also learns from these community groups what policy implementation looks and feels like to students, families, and educators</li><li>Offers district- and school-level trainings that position parents as academic partners in order to build grassroots support for the implementation of policies that advocates secure</li></ul> |

Funders can help provide new data and tools to advocates who lack the resources or capacity to acquire or create those data and tools themselves. There are two ways funders can support this infrastructure: (1) give funds directly to organizations to conduct their own analysis on the condition they share the results, or (2) task a

coalition with research and measurement to provide economies of scale for members and partners.

Because movements are, in one sense, portfolios of organizers and campaigns, with either approach funders should help spread information and resources to all members of the movement. They must assume collective responsibility for the full infrastructure, even if someone initially takes the lead or funders divide the responsibilities. Movements persist for years, so there is a significant risk that a lead funder shifting focus could cause the collapse of the movement infrastructure unless others step up to fill the gaps and are aware of the movement's needs.

In addition, funders and advocates should avoid alienating grassroots activists by becoming overly directive. Infrastructure should remain responsive to bottom-up leadership, grassroots requests, and local adaptation of national strategies. The Tea Party, for instance, successfully balanced a strong national infrastructure that guided local groups on where and how to engage in campaigns, while still empowering the grassroots as authentic drivers of the movement's energy and tactical direction.<sup>32</sup>

#### Box 6

#### Developing movement infrastructure and disciplined collaboration

In 2015, a U.S. Supreme Court ruling legalized same-sex marriage across the country. This victory for marriage equality came in large part due to the efforts of the Civil Marriage Collaborative, founded in 2003 with the backing of the Evelyn and Walter Haas, Jr. Fund. The Collaborative illustrates the key components of movement infrastructure and disciplined collaboration, including:<sup>31</sup>

- **Evidence-based messaging and tactics shared across the network:** The Collaborative invested significant funding into deep research on messaging to persuade people to support marriage equality. Based on this research, it convinced advocates across the movement to shift their leading message from "equal rights and benefits" to "love."
- **Invest in a portfolio of grantees and tactics:** The Collaborative supported a variety of tactics, including litigation, public education, community organizing, and communications.
- **Put resources behind coordination.** The Collaborative put real grant dollars behind the movement's shared strategic plan. Their coordination went far beyond talking and sharing information to true collective decision making and investment around their strategy.

### Ensure disciplined coordination

In movement building, disciplined coordination can mean the difference between a movement's success or failure. A lack of coordination does more than create missed opportunities; it can actively undermine movements. Typically, funders have viewed

<sup>31</sup> Foreman, Matt. "Hearts and Minds: How the Marriage Equality Movement Won Over the American Public." *Nonprofit Quarterly*, 27 Jun. 2016, [nonprofitquarterly.org/2016/06/27/hearts-minds-marriage-equality-movement-won-american-public/](http://nonprofitquarterly.org/2016/06/27/hearts-minds-marriage-equality-movement-won-american-public/).

<sup>32</sup> Zernike, Kate. *Boiling Mad: Inside Tea Party America*. Times Books, 2010.

“If you really have people that are innovating, there will be a very significant amount of failure. For us, our success at deep canvassing came about through an iterative learning process that took seven years.”

-Dave Fleischer, Los Angeles  
LGBT Center

“coordination” as keeping others informed about one’s work or gleaning lessons about others’ work. They rarely have taken the next (and necessary) step of considering and seizing opportunities to take complementary action.

Funders should move beyond the traditional “coordination” of annual information-sharing conferences. To be more effective, funders need to pursue a more active collaboration model among organizers, advocates, and funders in related program areas. Many funders have yet to reach the full potential of traditional collective action even within their narrow fields because they intently pursue their preferred approaches; for such funders, this will be a major shift.

Movements can fail not just because funders are too directive and insular; on the opposite end of the spectrum, movements can also fail because advocates are reluctant to ask a diverse grassroots base to channel their energy into a coordinated strategy. The Occupy Wall Street movement, for example, ultimately became a group of isolated campaigns because their leaders wanted the movement to be so grassroots that they failed to meaningfully coordinate at all.<sup>33</sup>

To embrace true coordination, funders and advocates must change their mindsets and commit to:

- **Establish real, collective decision making and put resources behind coordination.** Coordination entails more than just sharing information about each group’s strategies as an “FYI.” Groups must actually make strategic decisions together to ensure that the movement’s approach is both comprehensive and diverse. Funders and advocates should clarify which decisions need to be made collectively and which strategies need attention so partners can adjust their work.
- **Include others working on related issues outside their traditional scope.** Movements build support by bringing together groups at the intersection of many different interests. While it may feel uncomfortable or like mission creep to include those outside one’s traditional focus area, it is essential to listen to the grassroots and coordinate among the many entities trying to achieve a movement’s goals. In some cases, coalition members will have to shift or expand their issues to stay relevant and will benefit from established partnerships with groups working in those new focus areas.
- **Listen to differing perspectives to identify blind spots and potential tensions, and establish a process to manage differences.** Partners must establish transparent, trusting relationships that leave dialogues open even when partners disagree. Funders and advocates must be prepared for the possibility that their priority issue or message will not rise to the top. Funders must be open to their preferred organization not taking the lead. When there are differences, strong collaborations will have established procedures for

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<sup>33</sup> Smucker, 2017.



resolving those differences or moving forward despite them. Steele's comments about a partner in the Oklahomans for Criminal Justice Reform coalition illustrate this value: "He is so smart and bright and pushes me beyond my comfort zone every time we talk. We grew together."

- **Support groups that are active and already working together, and expand coordination by following new connections, being inclusive, and demonstrating the value of coordination.** Funder incentives, such as grants conditioned on coordination between groups, can help promote collaboration. However, funders should seize opportunities to strengthen existing relationships that form the core of movements. By supporting ongoing relationships between movement organizers, funders can help sustain and share expertise with movements that have plateaued and are seeking to accelerate progress. For example, the Women's Marches in early 2017 generated massive support and then seemingly shrank, but many supporters remained active in other "resistance" movement groups, such as Indivisible. If funders and advocates were only interested in the Women's Marches, they would miss the overall movement's growth and continued opportunities for investment in partner organizations.

This type of deep, ongoing coordination will be challenging. It is even more difficult than getting funders to collectively work on priorities within a single issue area. Still, it is possible to achieve this coordination if funders are willing to shift their mindsets. For example, the Education Funder Strategy Group recently established a rapid-response fund to address issues, such as immigration, that seem outside their traditional realm but are priorities for the parents they are trying to engage around education equity. Promisingly, advocates are finding that new tools, such as social media, have made close cross-issue collaboration easier. In an environment where audiences are constantly seeking new content, "it's costless to share other organizations' materials now," Norton says.<sup>34</sup>

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<sup>34</sup> Norton, Donna. MomsRising. Personal interview. 12 Apr. 2017.



“There has to be some way to distinguish between people who are failing, and people who are failing and learning. Then, sticking with it – even though it feels risky – feels less risky.”

*-Dave Fleischer, Los Angeles LGBT Center*

## VI. Evolve and adapt to increase effectiveness

One of the major challenges of advocacy, and long-term movement building in particular, is monitoring progress, evaluating strategies and tactics, and learning what to continue and what to change to advance success. However, shifts in mindset coupled with new measurement tools can help funders and advocates turn this uncertainty into flexible, iterative learning and productive risk-taking. At the movement building phase, they can seek to measure cumulative growth and evolution over time. At the point of movement action, they can diversify risk and keep an open mind even as they focus on deploying tactics that have proven successful in the past.

### Measure cumulative growth and evolution over time

Funders and advocates must shift their view of “success” and “failure” if they hope to track and support movement development in real time. In an advocacy context, a successful campaign delivers a specific policy goal. In a movement context, success can come in many forms before policy change; success is broader and cumulative, such as growing a base of supporters. Movement-building campaigns may not secure policy outcomes at first. Indeed, an advocacy campaign can achieve a policy goal but still reduce a movement’s long-term potential by sapping a community’s energy.<sup>35</sup> It is crucial not only to measure campaigns by whether they achieve specific objectives but also to evaluate how they contribute to a movement’s cumulative growth.

By collecting data on what advocates have tried, what worked, what didn’t, and when, funders can help future organizers hone their tactics and choose their targets. Signs of success may include:

- **Steady rate of growth in movement participants.** Many movements take decades to grow and coalesce before they achieve their ultimate policy goals. In the meantime, a successful campaign in support of movement building can attract new participants while effective tactics can deliver more supporters each time they are repeated and refined. Freedom to Marry was widely credited for winning marriage equality in 2015. Although they celebrated victory and shut down after just 12 years, their work built on decades of tactical experimentation by others. Milestones such as the Stonewall riots, the election and assassination of Harvey Milk, the National March on Washington for Lesbian and Gay Rights, and the many other cultural influencers that gradually helped increase the number of LGBTQ rights and supporters were essential to marriage equality.
- **Shifts in public sentiment.** Over time, successful movements shift the way people perceive and talk about the world. Before policy change occurs, a shift

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<sup>35</sup> McAlevy, 2016.

in public dialogue can signal progress in the symbolic contest. The conservative legal movement has been enormously successful in placing conservative judges across the United States. When the movement first began, however, it did not focus on securing judicial positions. Rather, the movement began by gradually establishing conservative legal principles and by cultivating bottom-up supporters for those beliefs, which eventually brought the power to win widespread appointments.<sup>36</sup>

- **Identification of key messages and collection of stories for future communications.** It may take years of experimentation to identify effective messages, but advocates should quickly drop messages that prove wholly ineffective. At the same time, some messages are needed to shift the public framing of issues in the long term, even if they do not fully resonate in the present. Advocates need to test ways to deliver those messages more effectively to key audiences. One approach is for campaigns to collect stories and examples that humanize new ideas, thereby building a base of new messengers that the movement can draw on as opportunities shift. Oklahomans for Criminal Justice Reform did rigorous testing to identify the best messages to support their near-term ballot measure campaign. In addition, the coalition identified stories they saw as indispensable viewpoints for shifting public understanding, even if those stories risked alienating some audiences in the near-term, and then found opportunities to begin sharing them through social media (see Box 7).
- **New connections within the movement network.** Movements depend heavily on trusted relationships between movement participants. Coordination between new partners for a campaign can lay the groundwork for long-term relationships that propel the movement forward. The test refusal movement began with a small group of mostly left-leaning advocates. Over time, they created grassroots action and media buzz that caught the attention of conservatives who began their own conversation. The tipping point for the movement's growth came when advocates found opportunities to connect liberal and conservative conversations so organizers could work together to persuade new supporters across the political spectrum.

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<sup>36</sup> Teles, Steven M. *The Rise of the Conservative Legal Movement: The Battle for Control of the Law*. Princeton University Press, 2010.

New technology makes it easier for funders and advocates to track and celebrate these data even if policy results lag. While new data sources such as social media may not perfectly track outcomes, they can help funders and advocates measure progress more frequently for lower cost, rather than operating blindly until more traditional outcome data becomes available. For example, official test refusal rates are released annually after the spring testing season (when it is too late for advocates to act); in some states, the rates are never released. As a result, understanding the growth of the test refusal movement required looking for other signs of movement participation besides the act of test refusal itself. Social media analysis helped funders and advocates track factors such as the amount of public attention paid to test refusal, the nature of the discussion, and who drove the discussion, to understand, predict, and respond to the movement's growth (Figure 4).

**Box 7**

**Using social media to test and advance a movement's message**

Oklahomans for Criminal Justice Reform offers an example of how social media enables advocates to take messaging risks and gather data on public responses to resolve strategic questions.

Initially, some coalition partners questioned the wisdom of emphasizing the "treatment over incarceration" aspect of criminal justice reforms for repeat offenders. They worried the public might not fully understand the dynamics associated with addiction and become less supportive of classifying repeat drug possession convictions as a misdemeanor. Yet when the coalition presented real-life stories on social media that explained that addiction is a health issue and relapse is often a part of recovery, public opinion responded to the science and embraced the policy proposal.

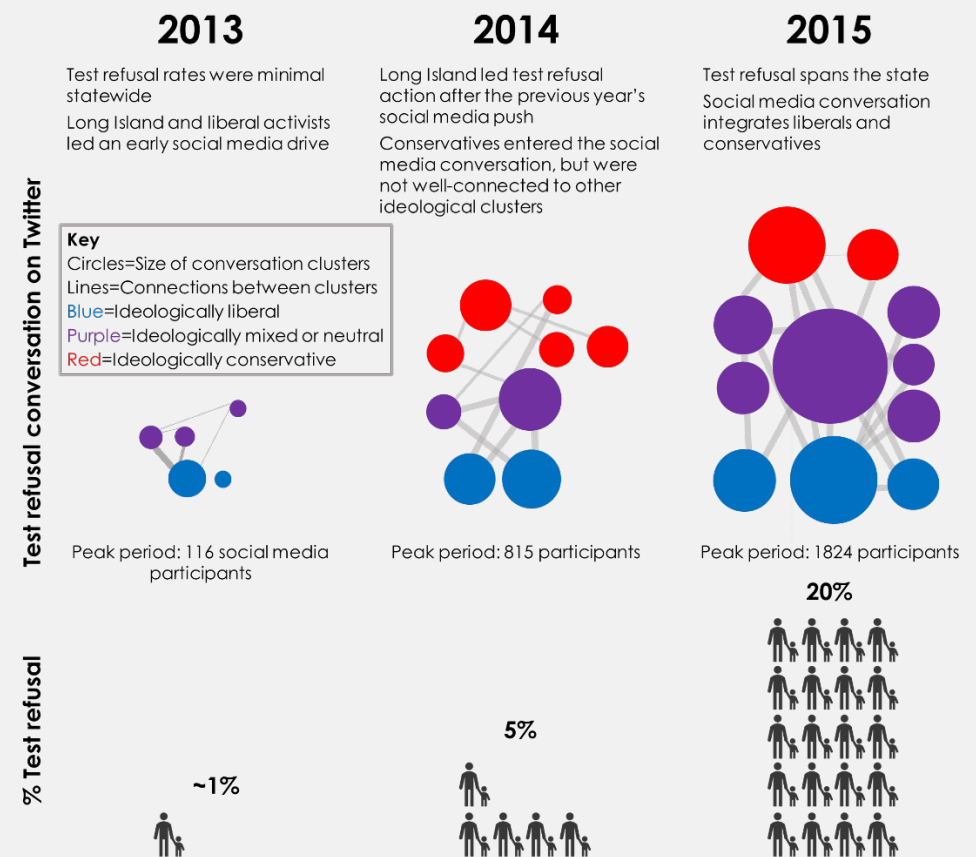
As Kris Steele recounted, "Social media provides an outlet to obtain instant feedback to move forward with effective messaging. In this case, this method of communication reminded us of who we are at our best and what we are capable of accomplishing together."

**Figure 4**

## Analyzing Twitter to track cumulative movement growth in real time

We used social media and network analysis to track interest in test refusal in real time (see graphic below). The figures in the upper row illustrate the evolution of the Twitter discussion around test refusal. They show snapshots of the peak periods of test refusal discussion in 2013 to 2015. Each group represents a major cluster of conversation, color coded by the cluster's general ideological bent. The gray background lines represent connections between those clusters (in other words, when individuals in different clusters reached out to one another). Over time, the network both grew and became more integrated as conversation clusters expanded and began talking with each other.

The icons in the lower row show actual test refusal rates reported by school districts. In 2013, before test refusal took off, incidences of high rates of untested students were minimal and essentially random across New York state (often in small districts, where a few untested students pushed the rate up). In 2014, following an early social media push by Long Island activists, higher test refusal rates were concentrated in Long Island. In 2015, after the social media conversation grew and integrated participants spanning the ideological spectrum, test refusal reached a record 20 percent statewide.



## Diversify risk and keep an open mind

Movements are the product of successive and iterative work by different communities, tactics, and campaigns. Groups, moments, and tactics that catalyze a

“You need a mix of different kinds of organizations [to build a successful movement] – from really grassroots local organizations who know each other and can knock on doors and be recognized in the community, to sophisticated think tanks, to capacity-building intermediaries, and more.”

*-Caitlyn Fox, Chan Zuckerberg Initiative*

movement’s growth and victories often are unpredictable and work over long time horizons. For instance, the Tea Party combined a mix of grassroots actions by members of all ages with direct political campaigns – from the local to national levels – to build power.<sup>37</sup> Funding only grassroots action by young people, or only focusing on a few political campaigns, might have limited the Tea Party’s ultimate scale and influence.

Because movements require funders to be patient, accept risk, and test a variety of tactics, philanthropy should fund portfolios, not just big bets. A traditional campaign funding proposal might involve an advocate coming to a funder with a clear theory of change and measurable goals for the short and longer term. A funder might support that advocate alone or identify other organizations doing related work and ask them to work together. If an organization failed to deliver on its proposed outcomes, the funder might shift to different opportunities.

In contrast, a movement-building portfolio might be more like a venture capital model: movement leaders and funders experiment with a variety of options, expecting that only a few will ultimately succeed, but they accept that risk is necessary to achieve those successes. At the same time, they can still seek to track progress and update their strategies based on what works and what fails along the way. “There are so many players in every movement, and those who are willing to fail fast, test strategies, and get out in the field have the most data,” says Phil Aroneanu, co-founder of 350.org. Consider 350.org’s approach to campaigns opposing coal power. Organizers at 350.org quickly designed an action around a “random plant they thought might be an interesting opportunity.” On the first try, the action did not take off, but when repeated the following year, “it worked and got more press” than carefully targeted work by other professional advocates. “Being prepared for that unpredictability is what makes movements ‘movements,’” says Aroneanu.

As movements expand, their leaders must maintain an open mindset and embrace newcomers with diverse motivations and tactics. If funders and advocates intentionally test new ways to connect their work to the broader public, they are less likely to inadvertently create an insular and easily dismissed movement that reaches a ceiling for expansion.<sup>38</sup> For example, Norton describes MomsRising’s approach:

We have a core set of family economic issues, but if we keep pounding away at early learning messaging every week, without talking about how it intersects with the school-to-prison pipeline, we become tone deaf. So we constantly and intentionally work on issues of critical importance to our members like police brutality, food justice, health care, and discrimination in the workplace. We connect the dots between all these issues because moms aren't experiencing any one issue in isolation. We can run analyses to see if the many people we brought in through our food justice work are also taking action on health care, Medicaid, etc. We can see how intersecting our campaigns works in people’s lives where they come in on one issue they feel

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<sup>37</sup> Zernike, 2010.

<sup>38</sup> Smucker, 2017.



passionate about, but there are other issues we work on that impact them as well.

The effort to defend America's public lands offers a prime example of a movement that successfully maintained its diversity as it grew. The movement continues to include a range of groups – from conservative hunters to progressive climate change activists – who approach land conservation from very different angles. While this diversity can cause friction within a movement, it also allows the movement to be influential across a wide variety of stakeholders and continue expanding beyond its initial base.

## VII. Philanthropy's movement moment is now

In recent decades, organizers have learned that much of what makes grassroots movements powerful is consistent across time and issues. Factors such as feelings of community, compelling stories, and strong organic leaders are always crucial.<sup>39</sup>

Today, new technologies and advances in social science have improved our ability to trace and harness the forces that drive movements. These new developments have begun to make movements more effective and democratic by allowing people to meaningfully engage in social and political change at all levels. “We’re incredibly blessed to live in this time, and it will only get better,” Steele says. “The ability to communicate via social media is, at least in part, a driving factor in the effectiveness of grassroots campaigns. It’s also very important in our form of government, because it allows people to stay informed and remain engaged.”

Foundations and nonprofits should seize this movement moment to grow civic engagement and build lasting social change. This will be challenging: it demands that funders and advocates make long-term commitments, shift their mindsets about what defines success, commit to true compromise and collective decision making, and experiment in order to learn. However, the reward is lasting change driven and sustained by people whose participation defines a truly inclusive democracy.

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<sup>39</sup> Fraley, 2016.

# Appendix A: Movement characteristics

Practically, movements differ from campaigns in three crucial ways:

1. **Movements set policy change goals within a larger “symbolic contest” that seeks to shift how we see the world.**<sup>40</sup> The name “Black Lives Matter” and Occupy’s “We are the 99%” slogan encapsulate those movements’ symbolic contests. Ineffective movements focus too much on these big ideas and never link them to policy outcomes; great movements both shift culture and achieve policy changes.
2. **Movements recognize and use the power of “organic leaders.”** These are ordinary people who are not professional activists, and they may not even be outspoken. But these organic leaders have credibility, relationships within their communities, and the ability to align themselves with the movement. The civil rights movement empowered prominent activists, such as preachers, but also ordinary people who inspired and organized others who were willing to put their bodies on the line for their beliefs. Powerful movements make change happen through this combination of authentic leadership, popular support, cultural shifts, and policy advances.<sup>41</sup>
3. **The intense energy and grassroots support required for successful movements becomes most visible at “movement moments.”** These thunderclaps of public outcry or support tend to be unpredictable and help create the pattern of “punctuated equilibrium” that typifies policy change.<sup>42</sup>

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<sup>40</sup> Smucker, Jonathan. *Hegemony How-To: A Roadmap for Radicals*. Kindle ed., AK Press, 2017.

<sup>41</sup> Smucker, 2017.

<sup>42</sup> Baumgartner, Frank R. and Bryan D. Jones. *Agendas and Instability in American Politics*. 2<sup>nd</sup> ed., University of Chicago Press, 2009.

# Appendix B: Overview of innovative tools

The table below summarizes new, often lower-cost tools to support movement building and related campaigns.

| Recommendation  | Tool                   | Application   |
|---|------------------------|---|
| Identify issues, venues, and messages   |                        |   |
| Listen to the grassroots to identify interconnected issues that create movement opportunities | New polling approaches | Use inexpensive online surveys with quick turnaround times (e.g., Google Consumer Surveys) to learn from the public about potential priority issues and messages  |
|   | Online search activity | Track online search trends (e.g., Google Trends) to identify priority issues and framing to incorporate into messaging  |
|   | Social media analysis  | Follow trending social media discussions and blogs to understand the public's priorities and framing of issues  |
|   | Deep canvassing        | Listen to opponents' perspectives and identify connections to movement issues   |
| Take advantage of online communities to test and refine messages                              | Targeted social media  | Follow key hashtags and search terms to understand trends in volume and content of discussion, incorporate top trends into messaging and campaign goals, and iterate based on what works<br>Share stories across social networks to build broad support<br>Conduct structure tests, such as hashtag campaigns and petition signings, to gauge support over time and escalate to in-person organizing and action |
|   | New polling approaches | Use inexpensive online surveys with quick turnaround times (e.g., Google Consumer Surveys) to test potential messages or gauge public opinion on key issues before deploying a major action or campaign   |
| Engage and commit ordinary citizens   |                        |   |
| Create opportunities for "organic leaders"  | Social media analysis  | Map social networks to identify influencers with large followings, as well as individuals or organizations that connect different clusters of conversation; reach out to and tag those people to connect with their networks; and recruit them as campaign messengers   |
| Create a compelling "movement journey" for campaign participants                              | Targeted social media  | Offer a variety of actions for individuals to participate in, give all levels of participation credit for contributing to successes, and experiment with ways to encourage the most committed participants to engage in additional offline activities<br>Keep offline participants engaged in between offline actions through social media dialogue   |
|   | Traditional media      | Use first-person stories to attract media coverage and shift the culture around key issues, providing validation of participants' personal investments  |

| Recommendation  | Tool  | Application  |
|---|---|--|
| Link issues and campaigns   |   |  |
| Build an infrastructure that will link campaigns and the movement     | Online project management and team coordination platforms | Set up easily updated online hubs (e.g., Basecamp, Slack, Trello, Asana) for movement participants to share information and materials, as well as communicate directly with one another on an ongoing basis  |
|   | Field experiments and other social science research       | Rigorously test the effectiveness of campaign- and movement-building practices in partnership with advocates, and widely disseminate those findings to movement participants   |
| Ensure disciplined coordination                                       | Social media analysis                                     | Identify active movement participants and network connections to build a portfolio of grantees and tactics<br>Assess links between social media, traditional media, and grassroots action  |
|   | Online project management and team coordination platforms | Create channels for funders and advocates who may seem peripheral to the movement or campaign to receive updates, contribute ideas, and share lists so that the movement has a holistic view of who is engaged and how   |
| Evolve and remain open to new ideas                                   |   |  |
| Measure the cumulative growth and evolution of the movement over time | Social media analysis                                     | Measure public interest, evolution of issue framing, movement participants, organizing networks, and opposition over time  |
|   | New polling approaches                                    | Use inexpensive online surveys with quick turnaround times (e.g., Google Consumer Surveys) to track public opinion trends and exposure to campaign messages and messengers over time   |
|   | Online search activity                                    | Track online search trends (e.g., Google Trends) to understand the relative priority and framing of issues over time   |
|   | Field experiments and other social science research       | Survey target audiences about their views on key campaign issues, and consistently follow up to assess the longevity of persuasion effects of various tactics and messages   |
|   | Traditional media tracking                                | Track issue coverage and the nature of that coverage in the publications most influential with key decision makers (e.g., newspapers in state capitals)  |
|   | Legislative tracking                                      | Track legislation over time to assess whether the volume of relevant bills increases or decreases, bills become more favorable or unfavorable, or bills shift their approach to key outcomes; map legislative progress or setbacks to campaign efforts   |
| Diversify risk and keep an open mind                                  | Targeted social media                                     | Seize low-cost opportunities to make campaigns inclusive, such as by sharing materials from a broad network of allies<br>Weigh the tradeoffs of sharing stories that may turn off certain audiences against long-term issue-framing goals, and actively seek balance across the ideological spectrum |
|   | Deep canvassing   | Develop and test approaches to having genuine two-way conversations that listen to perspectives outside the movement and seek opportunities to build connections despite differing beliefs   |

| Recommendation | Tool                 | Application   |
|----------------|----------------------|---|
|                | Legislative tracking | Ensure that messaging and policymaker outreach matches current legislative threats or opportunities and includes messages relevant to those policymakers and their constituents |

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