

**Organizing Obama:  
Campaign, Organizing, Movement**

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Remember!!! When Barack Obama announced his candidacy in January 2007, few “experts” gave it a chance. Yet few campaigns ever finished on such a high note as the Obama campaign last November. As one Pennsylvania activist put it just 10 days after the election:

“Delaware County PA volunteers have a fierce case of “Well, we’re all fired up now, and twiddling our thumbs!” I suspect it can’t only be happening here, but all over the country. Here, ALL the leader volunteers are getting bombarded by calls from volunteers essentially asking “Nowwhatnowwhatnowwhat?”

Over the course of the previous two years, a movement took shape within a political campaign, the “movement to elect Barack Obama.” Like earlier movements, it was rooted in shared values (equality, hope, community in diversity), driven by the creative energy of young people, demanded personal and political change (racial attitudes, acceptance of civic responsibility, etc.), focused on a clear strategic objective (electing Obama) and grew faster – and deeper - than anyone imagined. Because organizing was at its core it generated far more than a list of donors, potential donors, and a network of elected officials, funders, and campaign operatives: it trained some 3000 full time organizers, most of them in their 20’s; it organized thousands of local leadership teams (1100 in Ohio alone); and it engaged some 1.5 million people in coordinated volunteer activity. And because this national campaign built its own local organization – and eschewed the usual goulash of interest groups, party organizations, contractors, and 527’s – it was able to develop a new political culture, a foundation for a genuine renewal of American politics.

The purpose of this paper is to consider the role that organizing played by examining its part in turning an electoral campaign into a movement – or in harnessing a movement to turn it into an electoral campaign. Many factors contribute to a campaign as successful as the Obama campaign - fund raising, paid media, earned media, scheduling, targeting, luck, etc. But by investing in an organizing program the Obama campaign departed sharply from what had become the conventional way to run campaigns: marketing. This was a wise choice because for the insurgent Obama candidacy a conventional approach could only have strengthened the hand of the candidate with more conventional resources – his opponent.<sup>1</sup> How did the decision to organize come about, what did it contribute, and what lessons can we learn from this campaign that put organizing back on the map (with a little help from Rudy Giuliani and Sarah Palin, to be sure)

### *Organizing, Movements, and Leaders*

After visiting the United States in 1831, Alexis de Tocqueville wrote: “in a democracy, knowledge of how to combine is the mother of all forms of knowledge: on it depends all others.”<sup>ii</sup> Attending to the role of political parties, churches, and civic groups he argued association could draw people out of a narrow individualism he feared into construction of those common interests required for democracy to work. Moreover, the fact these associations were voluntary meant they could be a source of renewal of civic values on which a healthy polity depends. And finally, although perhaps of less concern to de Tocqueville, the democratic promise is that the combination of equal voices can, to some extent, balance domination by those with greater resources. Making democracy work, in other words, requires not only the protection of individual liberties, but also the creation of collective capacity. This is what organizers do.

Unlike political “marketers” who sell causes, candidates, or commodities by appealing to the preferences of their customers; unlike philanthropic “providers” who dispense services to needy clients; and unlike social “entrepreneurs” who devise technical solutions to challenging public problems;

organizers identify, recruit and develop leaders who can mobilize constituents to “stand together” to learn, collaborate, and act on behalf of common purposes.<sup>iii</sup>

Organizing has driven the great social movements that since our founding have been ongoing, if episodic, sources of accountability, renewal and change.<sup>iv</sup> Social movements require organizing, but not all organizing yields a movement. But movements do emerge from the efforts of purposeful actors (individuals, organizations) to assert new public values, form relationships rooted in those values, and mobilize political, economic, and cultural power to translate these values into action.<sup>v</sup> They differ from fashions, styles, or fads in that they are collective, strategic and organized.<sup>vi</sup> They differ from interest groups in that they not only reallocate “goods” but also redefine them. Not content with winning the game, they try to change the rules.<sup>vii</sup> Initiated in hopeful response to conditions adherents deem “unjust”, movement participants make moral claims based on renewed personal identities, collective identities, and public action.<sup>viii</sup>

Because social movements are dynamic, participatory, and organized to celebrate collective identity and assert public voice, their structures of participation, decision making, and accountability are often more like those civic associations that celebrate collective identity (churches, for example) or assert public voice (advocacy groups) than of those that produce goods or services.<sup>ix</sup> Participation rests on moral suasion more than on economic or political coercion – or incentives – so the outputs depend on voluntary, motivated, and committed participation of members and supporters.<sup>x</sup> Their authority structure is thus based more on leadership that can motivate commitment than exert control.<sup>xi</sup>

Organizers exercise and develop leadership - accepting responsibility to enable others to achieve shared purpose in the face of uncertainty. The need for leadership (a need often not met) is evident when encounters with the uncertain demand adaptive response: past practices are breached, new threats loom; a sudden opportunity appears, social conditions change, new technology changes the rules, etc.<sup>xii</sup>

The role of leadership in movements goes beyond that of the stereotypical charismatic public persona with whom they are often identified. Movements organize by identifying, recruiting and developing leadership at all levels. Sometimes those who do this work, especially when they work at it full time, are called *organizers* or, more colorfully in the past, *lecturers, agents, travelers, circuit riders, representatives or field secretaries*. Their focus, however, is on the development of volunteer leaders, rooted in communities they are trying to organize and on whom the vitality of the movement rests. The Grange, for example, a rural organization key to the agrarian movement of the late 19<sup>th</sup> century, enjoyed a membership of 450,000 organized in 450 chapters, a structure that required recruiting men and women for 77,775 voluntary leadership posts, of which 77, 248 (99.3%) were local, 510 at the state level, and only 17 at the national level. One out of every 5 members occupied a formal leadership post. More recently, a mainstay of the Conservative movement, the 4 million member NRA, rooted its activities in 14,000 local clubs, governed by some 140,000 local leaders, one out of every 25 members.<sup>xiii</sup> The Sierra Club, a 750,000 member environmental advocacy organization with some 380 local Groups organized in 62 Chapters, must recruit, train and support volunteers for some 12,500 leadership posts, of which 10,000 are local, 1 out of every 57 members.<sup>xiv</sup>

After 40 years during which conservatives seized the initiative by organizing a movement fueled by the race, gender, generation, and class reaction to the freedom movements of the 1960s, progressives seem to find a way to reconnect themselves to a tradition that embraces change, diversity and equality. In this paper, I explain how organizing came to play such a prominent role in the Obama campaign, why it happened, and suggest implications this may have for what will happen in the future.

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## *Creating the Conditions*

From the outset, the campaign operated with certain “givens”, conditions without which it’s hard to imagine a movement, or even a successful campaign, could have occurred: a motivating story of hope, a strategy that required a field campaign, and leaders who could do – and teach others how to do - the organizing.

### *Story of Hope: Narrative, Values and Constituency*

When Obama introduced himself to the nation at the Democratic National Convention in August, 2004, he inspired a nationwide constituency by telling a story of his own calling, reminding us of our calling as a people, confronted us with urgent challenges to that calling, and inspired us to make choices we must make to realize our vision of who we are: a story of hope, a “public narrative.”<sup>xv</sup> Recognizing that many Americans sensed a moral crisis in the land, not only a political one, his mastery of public narrative energized his audience around core values that had laid dormant among Democrats for years: equality, community, interdependence, and dignity. It was not that other political leaders did not share these values; but they seemed curiously unable to bring them alive in ways that could animate a constituency. Eschewing policy rhetoric, Obama reached back to recount the courageous, hopeful, and loving choices of those who formed him, parents and grandparents, to inspire us with a story of where he was going. He then reached back to the choices Americans made as country, our story, beginning with the Declaration of Independence, bringing to life a sense of connection for which many longed (we are not red states, not blue states, but a united states). To challenge us, he avoided a recitation of statistics, instead telling stories of individual people paying the price of our failure to live up to our values (a Maytag worker who lost health insurance, an inner city student with grades, but not the money, to go to college, etc.). And he called us to act, but with the hope that such action could succeed. Unlike most Democratic candidates who focus on the “means” of public action – policies or programs among which we may choose - Obama focused on the “ends” of public action – values that can inspire the action to fight for desired policy. More than anything else, this talk he called “Audacity of Hope”, he inspired a sense of the possible, reaching beyond the probable, underscored by the anomaly of his “very presence” on the stage, a fact noted in his very first words. Obama’s gift – and skill – for telling this story of hope created the potential for a movement especially among the young, a movement of “moral reform” in the best American tradition. But it could not happen if it were not organized.

### *Field Strategy Organizers on the Ground*

This “story” was to be enacted with a strategy that required mobilizing voters “on the ground.” To win caucuses, especially in Iowa, the first one, and in Nevada, and to win highly competitive primaries in New Hampshire and South Carolina, any campaign would have to have field staff on the ground. But what they would do there was another question. In recent years, recognition that personal voter contact at the door is more effective than a call, a piece of mail, or a commercial, where this kind of contact is needed, operatives usually hire – or contract for - a small army of paid canvassers, backed by a paid phone bank, to identify voters, persuade the undecided, and turn out the supporters on election day.<sup>xvi</sup> Viewed as “flaky”, difficult to control, and easily “off message”, volunteers play little or no role. In this way the “work” can get done, even on behalf of the least motivational of candidates, as long as it can be paid for.

A caucus is a different story. In 2004, observers noted that the Internet based fund raising success of Howard Dean had not translated into success in Iowa, where it had been combined with a paid canvass.

The Kerry campaign, on the other hand, showed how caucus goers could be “organized” - not by Dean style “orange hats” dropped into the state at the last minute - but by locally based organizers who could form relationships with each caucus attendee, identify leaders among them, and prepare them for all the maneuvering, negotiating, and decision making that goes on in a caucus. A top campaign priority, then, was to put organizers – not canvassers - on the ground in Iowa. It’s proximity to Illinois, Obama’s home state, also promised a rich source of volunteer organizers, a stimulus to the Chicago Camp Obama that trained them. Iowa was the focus of three experienced Midwestern campaigners: Steve Hildebrand, “early states” coordinator; Paul Tewes, Iowa director, Hildebrand’s partner, and veteran of the 1999 Gore Iowa effort; and Mitch Stewart, caucus director, and veteran of John Edwards 2003 Iowa work. And although caucuses had never been held in Nevada before, organizers were deployed there as well but due to the smaller size and later election date, in lesser numbers. A veteran of the 2004 Kerry work in Iowa, however, Mike Moffo, became field director.

Although primaries require a much broader voter mobilization effort, the New Hampshire and South Carolina contests, due to their size and competitiveness, also required an “on the ground” capacity to identify and turn out voters on Election Day. Matt Rodriguez, director, and Rob Hill, field director, were both deployed early in 2007, and although experienced campaign operatives, they had little or no experience in organizing. Although Hill had some experience with the Iowa caucus, much of his training was as a paid canvasser for PIRG. So even though the primary was a year away, they deployed their organizing staffs as a voter ID “army”, calling and canvassing voters repeatedly for many months. This was ironic because the one state in which the 2004 Dean campaign built a real organization was New Hampshire. It later became “Dean for America” and played a key role in turning that “red” state, “blue.”

One of two deputy directors of the New Hampshire Dean campaign, however, Jeremy Bird, was hired as field director for South Carolina. Bird, an aspiring organizer, had been hired by New Hampshire campaign manager, Karen Hicks, and trained in community organizing in that electoral context. Hicks had rejected the canvass approach, turned her canvassers into organizers, and provided them training by the author in the basics: story telling, one on one meetings, house meetings, strategizing, leadership development, etc. The 2004 New Hampshire Dean campaign was one of the first opportunities a “critical mass” of young activists had to learn social movement organizing methods, as applied to an electoral context. Besides Bird, Buffy Wicks (see below) came from this experience, as did “star” Clinton organizer, Roby Mook.

Because he was allocated fewer staff than New Hampshire, since his election was later, but mostly because of his experience leading the NH Dean campaign, Bird from the beginning turned his staff into organizers, trained them in NH organizing methods, and, despite considerable pressure from Chicago for “making his daily voter id numbers,” began to develop the local leadership that would ultimately lead that state to an overwhelming victory.

Until July 2007, then, these were the states in which the campaign had deployed staff to conduct field programs. Across the country, however, a database of people wanting to volunteer grew daily and new media “MYBO” groups proliferated rapidly, but without any real strategic direction. In Chicago, the national field director, Temo Figueroa, was not responsible for the four “early states”, Hildebrand’s bailiwick. He was to oversee the rest of the country, however, assisted by 4 “desks”, each of who had a chunk of the country. Buffy Wicks, the “desk” in charge of the 14 western states, was also a veteran of the 2004 Dean campaign, and a close associate of Bird’s. Equally focused on organizing – especially motivated by the fact that so many people wanted to volunteer, but little was being done to engage them – Wicks had initiated a national canvass day that was viewed as a surprising success. By July, however, pressure was mounting on the national campaign, not only from would be volunteers, but from funders for results (???). In California, for example, where the deliberate work of developing leadership had, by design, not yet yielded voter ID numbers, these influential Obama supporters did not see anything happening on the ground. In response Figueroa decided to take Camp Obama “on the road”, using them to offer training to volunteers who would then be equipped with some understanding of what to do with

their desire to elect Obama. The first of these “new” Camp Obama’s was to be in California and Wicks was assigned to make it happen. Figueroa also asked the author to help, who, in turn, put together a team of experienced trainers to support this training effort.

Wicks organized two Camp Obama’s in Los Angeles and San Francisco, and in just two weeks, launching 200 volunteer leadership teams, coordinated by 4 organizers. These Camp Obama’s differed from the Chicago version that had happened earlier in the campaign. They went beyond the individual technical training that had been the focus of those earlier efforts. Instead the 2.5 day session was used to structure individuals into clearly defined leadership teams, trained in organizing skills (story telling, relationship building, strategizing, and action), and launched committed to strategic goals. In an important act of confidence, the campaign gave them access to the coveted voter file, a database with extensive information on voters whom they would need to contact to meet their goals. Their work would also be transparent, allowing for accountability, learning, and recognition. Wicks later built on this approach by developing an internet tool that allowed volunteers to work targeted list from their homes, a tool that would morph into the “neighbor to neighbor” tool used widely in the general election.

Although three more “on the road” Camp Obama’s were held in St. Louis, New York, and Atlanta, only the Atlanta one took the same approach as California. This Atlanta effort was significant because the participation of the South Carolina field staff, who had implemented an organizing strategy with so much success in that early primary, acquainted the Camp Obama training team with some of the newer methods, like the leadership team structure. Wicks conducted Camp Obama’s on that model in a number of her western states, equipping volunteers with basic skills and a leadership structure through which they could begin to work. Furthermore, videos of the California Camp Obama’s were posted on you-tube and i-store by a volunteer videographer, making them available to others as a training resource.

Before long, Jon Carson, who had served a Illinois field director and had initiated the Chicago Camp Obama, was assigned to coordinate the February 5<sup>th</sup> states, both caucuses and primaries, where one or two organizers, a number of whom had been trained in California, were sent to initiate their own organizing efforts.

Thus, from these early commitments of resources towards an organizing campaign model and their resulting success, it was clear that field staff would have an unusually significant role to play in this campaign. This was not, however, for “ideological” reasons, but because winning would require it. Nor was it clear what the balance would be between New Hampshire style canvassing, Iowa caucus organizing, South Carolina primary election organizing, and California leadership team organizing.

### *Leadership Recruiting, Training, and Development*

Although with far more access to creative practitioners of the “new media” than any other campaign, it was clear that the Obama campaign would not have a “new media strategy” and an “old organizing” strategy, but, rather, an organizing strategy that incorporated new media tools.<sup>xvii</sup> Even while pioneering new media outreach via its MYBO groups, it was a campaign “given” that a successful field program required disciplined leadership on the ground. Results of voter contact were counted, analyzed, and evaluated daily which made clear the critical role of accountability was critical from the beginning. This results oriented organizing effort required disciplined field operatives.

This focus on volunteer organizing would also mean that to achieve scale, especially as the campaign grew, it would have to commit to ongoing leadership development. Although initial hiring to fill field positions drew on the ranks of experienced political operatives, most of those attracted to Obama were quite young. Their energy was funneled into summer internships, organizing fellowships and similar efforts at developing leadership from this youthful fount. The rapid diffusion of staff from Iowa, New Hampshire, South Carolina, and Nevada early in 2008 created opportunities for field organizers to become regional coordinators, for coordinators to become directions and for volunteers to

become organizers. And although expertise in intentional staff training came later in the campaign, the campaign structure created opportunities for *novices* to learn, *apprentices* to develop, *journeymen* to flourish, and *masters* to teach. The very long primary season and the number of caucuses that required organizing meant that the campaign had to build its own organizing capacity on a large scale. This necessity created an enormous opportunity for leadership development. Suddenly you were in charge of half a state!

On the other hand, although daily accountability was expected from the national level, very little mentoring was available. And until the late spring of 2008, nothing approaching a national training program existed. As a consequence each of the four early states – with the possible exception of Nevada - developed its own “organizing culture”, grounding relationships that persisted for the entire campaign, creating patterns of promotion embedded within those relationships, and an almost tribal dimension that would follow staff disseminated across the states. If you wanted to know what someone’s views on organizing – or how to treat volunteers – all you had to ask was which state they were from. It was very clear that spontaneous “self-organization”, the wished for result of online organizers, is a myth. On the contrary, developing a motivated, skilled, and strategic volunteer effort required ongoing coaching of organizers who, in turn, could provide coaching to volunteer leaders, creating a virtuous cycle of increased capacity. This required an ongoing investment in training and coaching that could cascade down through the campaign as those who learned these skills were called upon to teach them to others.

### **Five Organizing Practices Narrative, Relationship, Structure, Strategy, Action**

As the election results began to come in, early in 2008, organizing approaches taken in South Carolina and Iowa, as well as the volunteer work that came out of California, began to carry the day. The regime of measurement, accountability, and analysis of results established at the national level early on meant that novel approaches could be seen. The criteria was simple: whatever works, works. At May and June meetings in Chicago, the field leadership was convened to look at the results, consider what had been learned, and develop a common organizing approach for the general election, beginning with the training of some 3000 summer “organizing fellows.” As Hildebrand had become deputy campaign manager, Figueroa reassigned to focus on the Latino vote, Carson became field director, presiding over this process. Essentially, it was a negotiation among approaches; Iowa and South Carolina, the most relevant, and the results codified in an organizing fellow field manual. Even so, what played out in any given place – and the understanding and energy with which it was implemented – remained a function of “tribal” affiliation. The following are features of the approach that although not implemented universally was close to a campaign “standard”, distinguishing it from any that preceded it as a blend of organizing, movement building, and electoral success.

***Organizing rooted in bringing people together around shared values, the work of public narrative.***

Values based organizing, unlike issue based organizing, invites people to escape “issue silos” and come together as complete human beings whose diversity can become an asset for, rather than an obstacle to collective effort. Because values are experienced – and communicated - emotionally, they are the source of the moral energy – courage, hope, and solidarity - that it takes to risk learning new things, exploring new ways. And because values that inspire action are communicated as narrative, each person can learn to inspire others by learning to tell their own story, a story of the experience they share with others, and a story of an urgent challenge that demands action – a public narrative.

Public narrative is a leadership practice. Through narrative we learn to make choices in response to challenges of an uncertain world – as individuals, as communities, as nations. To respond to urgent challenge creatively, we draw on sources of hope over fear; empathy over alienation; and self-worth over self-doubt – matters of the heart we can learn to articulate as our story. We must also formulate a vision how we can act, a matter of the head, articulated as our strategy. And then, of course, we must act, a matter of developing skillful and determined hands. Public narrative can help us link our own calling to that of our community to a call to action now – a story of self, a story of us, and a story of now.<sup>xviii</sup>

As a practice, it can be structured, learned, and shared. The training offered by the Obama campaign was not built around learning Obama’s story, but, rather, learning to articulate one’s own story – not simply as a form of “self-expression” but, rather, as a way to engage others, at a deep level, in participating in the campaign. Focus on mastering the craft of story telling permeated the campaign through you-tube, campaign websites, and, perhaps most dramatically, Obama’s “race” speech, delivered in Philadelphia on xxx which concluded with the “story” of Ashley, as had occurred in a South Carolina house meeting.

Learning the practice of public narrative enabled organizers and volunteers to articulate the core values of the campaign, encouraged trust among them, and enhanced their efficacy by enabling them to engage voters far more effectively than the use of traditional scripts, talking points, or messaging.

***Organizing based on relationships based on mutual commitments to work together on behalf of common interests.***

It is the process of association – not simply aggregation - that makes a whole greater than the sum of its parts. As de Tocqueville noted, through association we can learn to reinterpret our individual interests as common interests, an objective on behalf of which we can use our combined resources. Relationship building thus goes beyond delivering a message, extracting a contribution, or soliciting a vote. These “lateral” connections, entirely missed in canvassing, telemarketing, or most email driven operations, are what create the “glue” – or social capital - that sustains volunteer engagement in the face of challenge, inspires creativity in the work, and supports reaching out to diverse social networks to engage the broader community.<sup>xix</sup>

Campaign organizers learned the craft of the one on one meetings and the house meetings that laid the foundation for local organization, rooted in the commitments people made to each other, not simply an idea, task, or issue. One on one meetings are held to initiate an ongoing working relationship, not simply get a signature, a donation, or a pledge of support<sup>xx</sup> - a key distinction between organizing and mobilizing. Successful one on one meetings can lead to a house meeting to which the “host” invites a broad network of associates to attend – some of whom agree to hold their own meetings, thus activating the networks that weave their way through every community. It was the house meeting approach that had been so successful in the 2003 Dean New Hampshire campaign and which became the model for the best organizing in the Obama effort. One advantage this approach for an “insurgent” candidacy is that it is a way to identify community leaders by testing them – those successful in hosting a meeting demonstrate potential – a way to avoid depending on established organizations that may resist change, or are allied with one’s opponent.

In the South Carolina campaign, for example, by October 2007, organizers had held some 400 house meetings, attended by some 4000 people, the foundation for a mobilization that would deploy 15,000 Election Day volunteers, most of them active politically for the first time.<sup>xxi</sup>

***Organizing structure based on team leadership, rather than individual leadership, shared purpose, clear norms, and well defined roles.***

Volunteer efforts often flounder due to a failure to develop reliable, effective, and creative individual local leaders. Some see leadership as the job of a boss, telling compliant others what to do. Others, suspicious of the whole concept of leadership teams, reject structure entirely – with chaotic results.<sup>xxii</sup> Thus volunteer groups often fragment, leaving work in the hands of a single person who then complains that no one wants to help. This is one reason that many electoral campaigns avoid relying on volunteers, preferring paid canvassers. Even the volunteer “precinct leader” model risks burnout, over-control, and unreliability.

Social psychologist Ruth Wageman and I learned to address this problem of volunteer drift in our research with the Sierra Club, where we worked to launch leadership teams based on shared purpose, explicit norms, and clearly defined interdependent roles.<sup>xxiii</sup> The success of this effort in creating more vigorous and sustained member engagement translated directly to the Obama campaign. Sierra Club training director, Liz Pallato, joined me in collaborating with Wicks to adapt this approach for the campaign at the first “on the road” Camp Obama in Burbank. We observed three results: anxiety (who’s in charge, how will we decide, etc.) declined perceptibly and almost immediately, capacity to achieve results increased (measured by team capacity to commit volunteers to attend a meeting “back home” before they left the training), and, despite uneven and limited support from coaches, most of the teams launched in this way survived through election day. After the Atlanta Camp Obama this approach was introduced to South Carolina by trainer Joy Cushman and by the time of the June Chicago “summit” it had demonstrated its value by enabling California volunteers to produce 200,000 phone calls a day to other states and, as applied by Bird and Cushman, enabling Pennsylvania volunteers to register more than 100,000 voters in XXX weeks.

Structured leadership teams encourage stability, motivation, and accountability, using volunteer time, skills, and effort to effectively advance the group’s goals – in this case, electing Barack Obama. Rather than stifle action, teams create structure in which energized volunteers can actually accomplish real work. They communicate a far more practical – and appropriate - vision of leadership than the often relied upon alpha male boss with all the answers. Over the course of the campaign, organizers learned how encourage the selection of able participants more effectively, eventually establishing the neighborhood leadership team as the fundamental organizational unit in support of which the whole field structure was built. Each team, in turn, accepted responsibility for achieving the shared purpose of mobilizing voters, contributors, and more volunteers within specific neighborhood based turf. In the general election the thousands of leadership teams was buttressed by a support structure of some 2500 field directors, regional field directors, and field organizers.

***Organizing focused on a few clear strategic objectives, as a way to turn those values into action;***

National electoral – and advocacy - campaigns locate responsibility for national strategy at the top. But when they “chunk out” strategic objectives in time (deadlines) and space (local areas) they can create the space for real local autonomy to strategize how to accomplish these objectives. This can empower, motivate, and invest local teams in achieving desired outcomes. Participation in a national campaign can benefit local efforts enormously: it creates an opportunity to learn from peers, to receive coaching from mentors, to gain access to far greater strategic leverage, and to get support in “the crunch.” National efforts, in turn, benefit enormously from campaign ownership from the bottom up: access to local knowledge, greater motivation, better quality work, more work, and greater capacity for strategic

adaptation. Striking this balance meant the movement as a whole was relentlessly well oriented *and* the personal motivation of volunteers was fully engaged. The challenge of how to orient numerous local teams without micromanaging them or dumbing down their work to the extent they trivialize volunteer time, effort and imagination is one campaigns seldom meet. The “appropriate” balance between national strategy and local autonomy – and input - has to be determined campaign by campaign, depending on the content, context, and constraints.

The factors that motivate volunteer engagement are well known if rarely practiced. Three conditions must be met: experienced meaningfulness, autonomy, and feedback. To the extent volunteers are charged with achieving a “significant” outcome (it makes a real difference in the world), a “whole” outcome (not just turning a bolt, but building a machine), and one that engages the “whole” person (head, hands, and heart), it is experienced as “meaningful”. When coupled with the autonomy to hold real responsibility for the outcome, along with real time feedback, the intrinsic rewards of participation outstrip the effects of extrinsic reward (money, recognition, etc.)<sup>xxiv</sup>

Few electoral campaigns are designed to permit strategic autonomy to anyone except those at the top – let alone volunteers. Campaigns are usually designed as “control” organizations than rather than “commitment” organizations, for which the goal is the daily metrics. The Obama campaign did not begin by investing autonomy in local groups in any of the four early states. On the other hand, each state director had a great deal of autonomy as to how he would produce the “metrics” – electoral metrics, to be sure, not organizing metrics. Although autonomy was tightly held by state leadership in NH, it was more distributed in Iowa and, especially, South Carolina. And as the team structure began to take hold, a key element that made it work was delegated responsibility for achieving its own objectives. The emphasis on training increased the capacity of teams to achieve their goals, along with their motivation to do so. The “leap of faith” the campaign made offering them access to the voter file, encouraged them to live up to the responsibility they had been given. This – and the sheer numbers involved, the vastness of the country, and the scale of operations – empowered local volunteers to enjoy responsibility for achieving strategic objectives to an extent that rarely occurs. So the structural balance that emerged – unevenly, to be sure – between local action and national purpose was an unusually strong one. It is hard to imagine a movement emerging in a context that did not offer real opportunities for meaningful autonomy at the local level.

***Organizing outcomes that are clear, measurable, and specific allowing for evaluation, accountability, and real time adaptation based on experience.***

The outcome of an election is decided by counting votes or, in the case of nomination, delegates. In principal this is no different from assessing the outcome of a union organizing drive, a campaign for legislative reform, or a campaign to shut down coal plants. The challenge is to determine metrics that can assess progress – or lack of progress - toward the goal. Conventional campaigns count voter identification (for us, for them, not sure). By going over a list again and again – in person or over the phone – until it becomes clear who the supporters are, who’s for the opposition, and who’s undecided - including the demographic information to extrapolate which voters are most likely to fall in the categories. The campaign may then target a “persuasion” strategy on persuadable undecided’s or a “motivational” strategy to “get out the vote” of supporters who may be less likely to vote. There is logic to this approach, especially near the end of a campaign when voters have more information on the candidates, and it can be done with paid canvassers or telemarketers. A “persuasion” strategy then may feature targeted mail, targeted calls, etc. The get out the vote strategy may feature house signs, door hangers, radio commercials, and intense phoning and canvassing.

The situation Obama and his competitors faced, however, was quite different. In early 2007 it would be almost two years before the general election, more than a year to the convention, and just about a year to the first caucuses and primaries. This far out – and in an insurgent campaign like this one – it would not do to attend to these metrics only. Organizers count too, however, but they count different things. The focus on an organizing drive is, first, to identify, recruit, and develop volunteer leadership upon whom the success of the campaign will depend. Engaging local residents begins to share ownership with local voters, who then can more effectively contact their social networks on behalf of a candidate (or cause), embedding commitments of support in the relational fabric of the community. Investing in building a volunteer base early on makes it possible to achieve scale, as well as depth, without paying large sums for less effective paid canvassing and phoning operations. Finally, recruiting, training, and developing the local community members is not only a cost, but an investment in civic capital, an investment that may pay off for years – election after election, cause after cause, etc.

So organizers count one on one meetings, house meetings, attendance, new house meeting hosts, new volunteers, etc. These “organizing” metrics are coupled with “action” metrics: commitments to show up for canvassing, number of people who showed up, number of doors “hit”, voters identified, etc. An organizer is not stuck on a phone for hours every day doing work that volunteers could do far more effectively. The organizer invests time in recruiting leaders to organize the volunteers who will contact the voters – and contribute to local strategy, speak at public events, host candidate visits, donate food, help in the headquarters, make up songs, etc. etc. Organizing metrics were counted in South Carolina, despite substantial pressure from the top to meet voter ID goals at the same time.

The nitty-gritty campaign work that volunteer leaders do - recruit more volunteers, persuade undecided, get commitments, etc. – also requires counting if they are to enjoy real responsibility by evaluating their work, learning from it, being accountable for it, and recognizing their success. The team structure helped to meet this challenge in that each team had a “data manager”, chosen because s/he was equipped for that job. Team “data managers” could coordinate, learn together, update their teams, etc. The internet made the challenge much easier to address by facilitating the flow of information up, down, and across, which made operations more transparent, encouraged learning, enabled people to experience the excitement of being part of a whole, and benefit from the competitive desire to do their best. By making this data available at the local level, it became a resource for adaptation, learning, and variation in approach, exactly where it was needed.

## Conclusion

In this paper I’ve tried to show ways in which this “movement building” campaign took a very different path from a typical marketing campaign. Understanding how this happened may help us get a better understanding of how things have unfolded after the election that can go well beyond statements like “that’s politics.”

A highly motivated constituency, rooted especially, but not only, in the young, moved by a story of hope that engaged their values and drew them to candidate and campaign was transformed into a very powerful electoral force. To be sure, the financial resources generated to support this effort were extraordinary, but other campaigns have raised lots of money and not used it in this way. This effort was able to combine the enthusiasm, contagion, and motivation of a movement, with the discipline, focus, and organization that it takes to win.

This was not a foregone conclusion. Many have observed that since Obama had served as a community organizer, his campaign would of course feature organizing. However Obama’s run for the Senate was as conventional a campaign as any. In fact Obama’s experience of organizing was within an orthodox Alinsky approach of the lone organizer who “agitates” people into awareness of their “real”

interests, takes values for granted, focuses on what's "winnable" over what's urgent, and views social movements as inherently unstable. And as Obama recounts, this experience left him disturbed by the loss of control he experienced, and unsatisfied by the limited aspirations.<sup>xxv</sup> This is a far cry from the kind of "movement building" organizing that became typical of the campaign and of which Obama, in fact, had no real experience. In fact, Obama wrote of his belief that the way to win a campaign was to "turn it over to the professionals."<sup>xxvi</sup>

Although the inner circle of the campaign included many talented and creative people, skilled political operatives, and people who had run field programs for many years, it did not include anyone with any organizing experience outside the realm of conventional politics – and no one with movement organizing experience. The New Hampshire campaign was allowed to proceed with no organizing at all, relied almost exclusively on full time staff to get the "real" work done, supported by volunteers bussed in from Boston, not unlike the unsuccessful Bradley primary campaign in which the state director had been involved. Had this approach been utilized everywhere, it is very unlikely the movement could have ever flourished as it did.

So what happened?

The Iowa caucus – and the caucuses in general – played a key role in bringing organizing into the campaign. And although the organizing experience brought to bear in Iowa was entirely electoral, it was based on a realistic appreciation of the fact the local leaders had a major role to play if the effort was to succeed – as the Kerry campaign demonstrated four years before.

So where did the movement organizing come from. Obama's candidacy not only attracted young people, but it attracted a small core of dedicated young organizers, many of whom came out of the 2004 New Hampshire Dean campaign, and who while committed to Obama, also saw the campaign as a way to bring organizing back into politics. Jeremy Bird, South Carolina Field Director, was a key figure who brought the story telling, relationship building, and training he had learned in New Hampshire to South Carolina. Buffy Wicks, another veteran of the Dean campaign and a collaborator of Bird's, played another key role. With others, and quite openly, this core established organizing "beach-heads" in the campaign beyond the caucus states, developed their own "tribes" of staffers trained in their approach, formed an organizing network within the campaign committed to develop effective organizing practice within the campaign.

In alliance with the Iowa "tribe", they won the campaign to an organizing approach that could translate grassroots motivation into an organized action – but not turning it into an army, an old school compliance organization. Furthermore, Bird, Wicks, and others made a concerted effort to "educate upwards" within the campaign, one of their first converts was Jon Carson, national field director for the general election. Although like others within the Obama circle, Carson had no experience organizing outside the electoral context, he proved a quick study, and became a committed supporter. Although Obama did not initiate the organizing approach, as it unfolded, he became an enthusiastic supporter, lifting up the work, recognizing the contribution, and, almost uniquely in presidential campaigns, made sure to introduce the organizers and every stop during the critical days of the general election.

What are the implications of this analysis for the future? Stewart and Bird, the Iowa and South Carolina field directors, respectively, have been hired as director and deputy director of Organizing for America. The context, however, has changed. The absence of an electoral campaign means, among other things, that their efforts are not subject to the discipline of winning or losing caucuses and primaries, making the measures of effectiveness murky. Obama, President of "all the people", has little time, energy, or desire to offer any personal leadership to OFA. Although Bird and Stewart have acquired considerable electoral organizing experience, the decision making remains with David Plouffe, Obama's campaign manager, undoubtedly a fine electoral strategist, but whose understanding of organizing remains an unknown, especially of the kind of organizing required to build a movement in the absence of an electoral campaign. Finally, as an entity of the DNC, pressing the President's agenda is difficult

when some of the key targets for pressure are off limits because they are Democrats. At the same time, the promise a fresh approach to citizen engagement, informed by organizing principles articulated above, seems to have been eclipsed by well funded philanthropic social service and social entrepreneurship lobbies, well situated within the administration's "inner circle."

But this is not all about limitations and constraints on the Obama organization. The unparalleled investment the campaign made in the development of civic capital – infrastructure of leadership, teams, and organizers – has already changed us, creating new capacity, opportunity, and possibility. Citizen efforts to support the Obama program are springing up around the country. And the youthful organizers have become the objects of major recruiting effort by community organizations, the labor movement, and advocacy groups of every ilk. Why these advocacy groups are not making better use of their newfound assets is another question, addressed more directly in Peter Dreier's excellent paper.

I conclude with the rather poignant words of Wisconsin team leader, Staci Leigh O'Brien, written shortly after the election:

As I struggle to sort out how we can reach out and help this community, I'm realizing the Obama campaign had three key elements that are not easily replicated: a common purpose; a clear end point; and obvious steps toward our goal. Our team flourished. . (and) what I want is a way to help that inner city neighborhood build their own teams and pass on that torch of ownership. So I write with two requests:

If you have a suggested next step for me, given my goals, I would be grateful. Maybe it is a book to read, a plan to follow, or some advice of your own. My goal is to find a way to empower a neighborhood the way your system empowered mine—to pass on the tools this neighborhood needs to organize themselves.

My second request is simple: Please use us! Train us further! Convince the Obama administration that the investment in community organizing was sound, but it is far too early to pull out . . . Bring us together again and teach us these next steps we long for so we can continue to make a difference in our communities. Teach us how to create purpose and structure for more teams to flourish, tackling all kinds of problems in all our little corners of the world.

My fervent hope is that the Obama administration understands the true power of the network they have created. We are not, as others seem to believe, legions of starry-eyed youth voters waiting to have the right button pushed or the right string pulled to help garner support for new policies. We feel respected, empowered, and included. I am a 45 year-old with a Ph.D. in English who has been happy to influence my world through my classrooms for years, but I've been exposed to the power of grassroots organizing, and to deep pockets of need that are minutes from the private college I teach at—yet worlds away. I don't need goals handed to me each week anymore, just a little help with the next steps to continue passing the torch.

I hope this is not asking too much. I admit that when my volunteers fill up my inbox, literally asking what they should do next, I feel a little annoyed by their need for guidance...and here I am asking you for the same. Regardless of your response, I am very grateful for the gift you have given to me. I hope to honor it by continuing to pass it on.

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- <sup>xv</sup> For a definition of public narrative see below. For an analysis of Obama's 2004 Convention speech using this framework see "Leading Change: Leadership, Organization, and Social Movements" in *Harvard Business Review Handbook on Leadership*, HBS Press, Cambridge, forthcoming 2009; and "What is Public Narrative?", *Working Paper*, Harvard Kennedy School, Cambridge, 2008.
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