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# Base Power

## Learning Community



Webinar 5:  
Data for Building Power  
at Multi-Entity  
Organizations

1. **Intros** in chat box – name, organization, and any questions
2. **Add pronouns** on Zoom: Participants > hover over your name > click the More drop down menu > click Rename

# About the Learning Community

The **Base Power Learning Community** brings together progressive intermediaries and leaders to learn, document innovation, and create resources for multi-entity organizations building membership across their legal entities.

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**NEW LEFT  
ACCELERATOR**

NLA collaborates with those building durable progressive power for the progressive movement.

NLA runs capacity-building programs focused exclusively on supporting progressive organizations and ecosystems to use **multiple legal entities** to build power, increase impact, and win.

The Base Power Learning Community is Hosted and Sponsored by:

Progressive  
**Multiplier**



**NEW LEFT  
ACCELERATOR**

# About this Webinar Series

Recordings of previous webinars and registration for upcoming webinars are here:

<https://rebrand.ly/basepower>

1. **BASE-BUILDING & MULTI-ENTITY MEMBERSHIP MODELS**
2. **501c(3) AND c(4) MEMBERSHIP PROGRAMS: NAVIGATE THE LAW**
3. **USING YOUR 501c(4) TO ENGAGE YOUR MEMBERSHIP**
4. **RESOURCING THE BASE: c(3)/c(4) FUNDRAISING AND DUES**
5. **DATA FOR BUILDING POWER AT MULTI-ENTITY ORGANIZATIONS**
6. **POWER OF THE MEMBERSHIP: HOW TO ENGAGE YOUR MEMBERS FOR ENDORSEMENTS**

# CORE BELIEFS

1. We believe in collaboration.
2. We take a learning stance to disrupt the traditional expert-learning model.
3. We recognize & name the complexity of base building work.
4. We aspire to change structural limitations.

# Community Norms

## **This is a learning space.**

What we learn here will also help us build better content for the movement in the future. You are contributing to movement learning-so please respond/share

## **Take care of you.**

We have a break scheduled but do what you need to be fully present in our conversation.

## **Anonymity.**

What is said or learned here will not be attributed to you or your organization in any way.

## **Your info.**

We aren't going to sell your info - we promise!

## **Recording.**

We are recording so we can share the presentation with others - but all questions or speaking from the audience and all attribution to any individual or group will be edited out.

POLLS



# Rose Espinola

- Founder @ Movement Tech Help Desk
- They/Them
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# Steven Carmona Mora

- Data and Technology  
Strategist @ The Movement  
Cooperative
- Coach @ The Movement  
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- [steven@mthelpdesk.org](mailto:steven@mthelpdesk.org)



# Support Team

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- Melanie Martinez (she/her)  
Coordinator at Movement Tech Help Desk  
Helping with the chat box
  
- Avery (she/her)  
Information Ecology  
Running tech for webinar

# WHO WE ARE

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- Support for Grassroots Organizers, Data Directors and everyone in between, thanks to funding from foundations and capacity-building organizations
- Provide on-call tech support across 17 tools
- Specialize in accessible, inclusive, and interactive digital coaching methodology

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# WHAT PEOPLE ARE SAYING

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“A million thanks! You ALL ROCK, the best tech support team ever! We made history together!!!! As the reverse migration granddaughter who came back to my family’s home state of GA twelve years ago, I’m so grateful. Thank you for helping me, my colleagues, friends and family during such a time as this. We made our ancestors proud!!!!”

- Valerie Rawls, EcoWomanist Institute (EWI)

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# Goals

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- Understand best practices and resources you can adapt for your own family of organizations
- Practice asking critical questions about different data flows



There is no one right way to structure data in your multi-entity organization.

Your data flows will depend on your legal entities, goals, tactics, and resources.

# Agenda

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- Definitions
- 5 Tips for Using Data to Build Power at your c(3)/c(4)
- 10 Minute Break
- Case Studies from c(3)/c(4) Organizations
- Q&A



# Things we will not cover

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- Membership models (*see first two sessions of this series!*)
- Creating culture of data collection
- Digital safety & privacy
- Choosing tools
- Questions to ask vendors
- Building our own open-source tools
- Fundraising for multi entity orgs (*see fourth session of this series!*)
- Consentful tech
- Ladder of engagement
- Assessing member engagement

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# Definitions

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- **Multi-entity organizations** are organizations that uses multiple legal entities -most commonly a 501c(3) and a 501c(4) - but sometimes a PAC, an LLC or other entity - to build power.
- **Members** are the people you are accountable to and are developing. We are also including our larger list of people who are following our work or donating.
  - The IRS defines membership formally for some organizations.
  - Most organizations have “informal” membership programs. Meaning we don’t design our program to meet the legal IRS definition of a “membership” organization.
  - For this training, we are using the informal definition of membership.
- **Data** is information we collect.



# Why do organizations create multi-entity organizations?

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- Nonprofits are legal entities created by Federal Law (IRS) and State Law. They are not created to help us base build.
- c(3)s created by the IRS as a means to give tax breaks to rich people.
- Both c(3) and c(4)s are highly regulated: Means we often must create multiple legal entities to build power.
- None of us would choose to organize ourselves under these structures.



Why do we engage our members?

# Why do we engage our members?

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- Accountability
- Power and legitimacy come from our people
- Independent resources & revenue



What is data?



**Selfies**



# Journaling





# Stories

# What counts as data?

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## Things you can count

- # of actions a member has taken
- Amount of time member involved in org
- Survey questions
- How much \$ has the member contributed
- Word or phrase counts in media or in conversation (especially over time)
- Counts regarding legislation introduced
- Website or social media stats

## Things you can describe

- Structured text (like survey or interview responses)
- Unstructured text (like free-flowing conversation)
- Oral histories
- Videos
- Images
- Songs, art, other pop culture sources

**Which types of data above you have never used (as data) in movement work?**

# Why do track data & set goals?

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- To be able to follow up with supporters across entities
- Understand and measure quality of community engagement
- To focus on the most important areas of our work, e.g. one-on-one conversations
- To plan – for example, we track schedules, languages, and experiments
- Tell funders the metrics we want to measure, rather than them tell us!
- Tell our members' stories

**What challenges  
do you face with  
data?**



# FIVE TIPS

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**Build your dream team.**

**Joint acquisitions is a best practice!**

**c(4) must pay market value for c(3) data.**

**Invest in training!**

**Data should be used to build power.**

## TIP ONE

Build your dream team.

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# ONE: Build your dream team.

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Data, Organizing, Legal

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# Questions to Ask

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## Organizing

- How do we create the change we want to see in the world?
- What c(3) and what c(4) tactics will we use? What metrics should we track?

## Data

- What do data flows do you recommend?
- How many hours of work, and what would be the cost, to do it some other way?

## Legal

- How do we accomplish what we want to accomplish legally?

## All

- Who is in charge of compliance?
- Who can we go to with questions about compliance? What is the process?
- What is our risk tolerance?
- Are you submitting a report to management team with # of records and # of emails sent per entity, and management reconciling expenses?

## TIP TWO

Joint acquisitions is a best practice!

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# TWO: Joint acquisitions is a best practice!

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Other terms used:

- List swap
- Creating lists

**Option 1:** Do online petitions, webinars, and forms as a joint action between your c(3)/c(4)

**Option 2:** Do online petitions, webinars, and forms and create share codes for other organizations to participate

What questions do you have about doing joint acquisitions?



# Joint acquisitions is a best practice!

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**Option 1:** Do online petitions, webinars, and forms as a joint action between your c(3)/c(4)

- c(4) pays for its share of staff time and tools
- Costs must be split in a reasonable manner (often the c(3) and c(4) each pay 50%)
- Use both your c(3) and c(4) logos, or logo for an issue campaign that both your c(3) and c(4) work on

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# Joint acquisitions is a best practice!

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**Option 2:** Do online petitions, webinars, and forms and create share codes for other organizations to participate

- Staff from an organization (any legal entity) creates online action and provides source codes to other organizations
- All signers are shared with all participating organizations OR each organization receives data for the # of new signers that they contributed to the list
- Action Network has a built in tool for these kind of actions
- May not need to bill involved organizations; need to look at it holistically: Is c(3) doing listswaps with other c(3)s? With other c(4)s besides affiliated org?
- Use all organizations' logos, or the issue campaign logo

When would you choose Option 2 instead of Option 1?

# Questions to Ask

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Ask these questions regardless for both **Option 1** and **Option 2**:

- Does our opt-in language allow for list sharing across all entities and/or coalition partners? (Should be yes!)
- Is this activity c(3) compliant? (Should be yes!)
- Is all the **data** we are collecting c(3) compliant e.g. no data about party affiliation? (Should be yes!)
- Have I read our Resource Sharing Agreement in the last year?  
What needs to be updated?

# Questions to Ask

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If coalition effort:

- How will the list be used?
- Where will the list be stored? Who manages the list?
- What will happen to the list after or if the coalition disbands?
- What are the terms of contracts the coalition has with any vendors?

# Resource Sharing Agreement

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1. Open this [Sample RSA](#) on your computer.
2. What are the main sections?
3. What parts do you find most interesting?





## TIP THREE

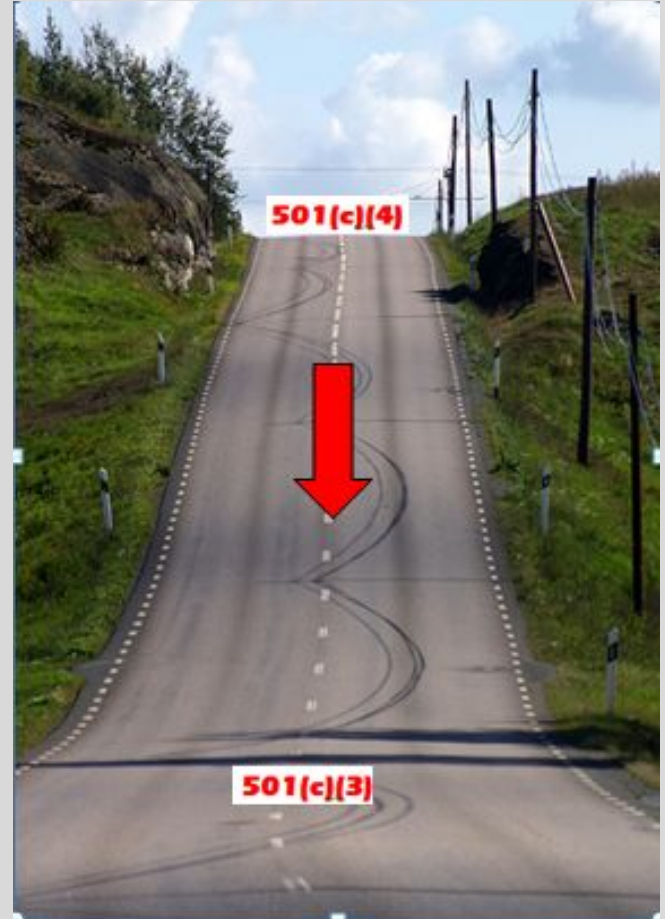
c(4) must pay market value for c(3) data.

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# Uphill-Downhill

It is easier to move  
resources from a  
c(4) to a c(3)



# THREE: c(4) must pay market value for c(3) data.

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- **Renting list**

- Education Fund emails members with a petition for the Action Fund.
- In other words the AF is renting the EF's email list for a few minutes to send the email.
- EF members sign AF petition, and opt-in to receive future emails & be members.



# THREE: c(4) must pay market value for c(3) data.

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- **Buying data** - AF buys a list of EF members' names, emails, and more.
- **Swapping data** - EF and AF each give the other 5,000 names and contact info.

What questions do you have?



# c(4) must pay market value for c(3) data

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- **Renting list** - Education Fund emails members with a petition for the Action Fund. AF can follow up with new petition signers.
  - c(3) can rent list to c(4) at fair market value
  - If your c(3) is making a list available to send out an email that is consistent with c(3)'s purpose, the affiliated organization may not need to pay a rental fee; talk to your lawyer
- **Buying data** - AF buys a list of EF members' names, emails, and more.
  - c(3) can sell list to c(4) at fair market value
  - If c(3) sells data, it is legally required to make that data available to others who might want it
    - c(3) can set rules about which data will share
- **Swapping data** - EF and AF each give the other 5,000 names and contact info.
  - c(3) not required to swap data with other orgs
  - If within a certain time period (e.g. 2 years) the number of unique names made available to EF by the AF does not equal or exceed the number of names initially made available to the AF by EF: AF shall pay EF the fair market value of the shortfall in names.
  - If c(4) has to pay for some data at end of term agreement, it may not qualify as buying data

# Market Value of List (*as of Jan 2022*)

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## Renting list

\$30-200 per 1,000 people emailed.

- **Care2** works with nonprofits and their price is **\$50 per 1,000 people emailed.**
- For new list acquisition, email Eric Rardin at [eric@care2team.com](mailto:eric@care2team.com).

Others charge per click, action-taker, or opted in email.

- **Left Click** works with nonprofits and their price is \$1- \$3 per clicker, \$1.25 per action taker, or \$1.50 per opted in email.
- You only receive clickers, action-takers, and/or opt ins.
- For new list acquisition, email Zach Schreiber at [act@Left-Click.com](mailto:act@Left-Click.com).

# Market Value of List (*as of Jan 2022*)

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## Buying data

National: \$1.50 - \$2 per person. Care2 works with nonprofits and includes email address, postal address, first and last name.

- With SMS opt-in: \$4 per person
- For new list acquisition, email Eric Rardin at [eric@care2team.com](mailto:eric@care2team.com)

Geo-targeted (state-based or congressional): \$2-\$4 per person

- With SMS opt-in: \$3-\$8 per person

## Would you choose to pay your c(3):

- A. For your c(3)'s *full list*?
- B. To send an email with a petition for your c(4), and *pay per thousand* email sends?
- C. To send an email with a petition for your c(4), and *pay only for clicks*, action-takers, or opt-ins?

**There is no right answer!**





# *Sample Opt-In Language*

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- **Email:** “Your information may be shared with Protect Our Rights and any affiliated organizations.”
- **SMS and Auto-Dial:** “By providing your mobile number you consent to receive cell phone and text communications from [Save the Oceans] [and its affiliated entities] concerning news, action opportunities, and other important information about oceans.”

# TIP FOUR

## Invest in training!

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# Questions to Ask

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- Do **all** staff have shared definitions around legal compliance, data, and organizing?
- Does our onboarding checklist include training on compliance, data, and organizing?
- Does staff know where to go when they have legal or compliance questions?
- Do we have a document that shows what data can be transferred from one entity to another?

**What other ideas do people have for training?**

## TIP FIVE

Data should be used to build power

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# FIVE: Data should be used to build power

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- Most progressive **data practitioners & tools** come from the electoral space (c(4), PAC, and candidate campaigns)
- We should track data that shows our power across entities
- When you decide on your metric goals for each entity, you can tell funders your metric goals rather than them tell you!

## **DEMAND**

What are our long-term, mid-term, and short-term demands?

## **TARGET**

Who is our primary target? Who are our secondary targets?

## **TACTICS**

What tactics can we use to pressure our target to give us our demand?

## **METRICS**

Considering the tactics we laid out, what metrics could we use?

# Questions to Ask

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- ❑ What metrics can we collect in election years to support community organizing?
- ❑ For electoral campaigns (c(4), PAC, or candidate campaigns): What is our “win number”? What tactics will we be using in this work? What metrics should we track?
- ❑ For issue campaigns (c(3) and c(4)): What tangible improvement do we want to win? Who is our target (decision-maker)? What c(3) and what c(4) tactics will we use? What metrics should we track?
- ❑ How are we tracking depth of member engagement?
- ❑ What are our metric goals for each entity?

Break: 10 Minutes



# Case Studies

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**Corolla**



**Tesla**

## Corolla

- Local or state-based org with c(3) and c(4)
- Size of data team: 0-1

## Tesla

- Large national org with c(3), c(4), and additional structures
- Size of data team: 2-5

# Emails & Online Actions

## Corolla

- Send emails in Action Network or EveryAction
- Use one group or committee
- Label custom fields or survey questions with `_c(3)` or `_c(4)` or `_both` based on which collected the data
- Data lives in your email platform

## Tesla

- Data is stored in two different groups
- Each system has own tags/codes & custom fields/survey questions
- Some emails are sent to `c(3)` list and some are sent to `c(4)` list
- Data flows from `c(3)` or `c(4)` entities using Action Network's "network" features
- Data flows to Civis or database of choice
- Data flows back into `c(3)` and `c(4)` accounts, from Civis or database of choice

# Voter Contact

## Corolla

- Use one committee in VAN or PDI
- Label custom fields or survey questions with `_c(3)` or `_c(4)` or `_both` based on which collected the data
- If you are getting your database through America Votes or State Voices, and want your data to sync, you will need to ask AV or SV. This is an organizing opportunity.

## Tesla

- 5 priority states have access to `c(3)` and `c(4)` VAN
- Different VAN committees for `c3`, `c4`, PAC, etc
- Predictive Modeling Usage
  - `c(3)` - Ideology
  - `c(4)` - Partisan

# Pulling Reports

## Corolla

- Directly from your database e.g. EveryAction or ActionNetwork
- Copy and paste to an excel sheet

## esla

- Data from Action Network and VAN flow to data warehouse (Civis or database of choice), which the organization accesses through their membership with The Movement Cooperative
- Reports are pulled from a data warehouse (Civis or database of choice)
- It might take a few hours for a small data warehouse or a few months for a large or moderate size one

**Build your dream team.**

**Joint acquisitions is a best practice!**

**c(4) must pay market value for c(3) data.**

**Invest in training!**

**Data should be used to build power.**



# Q&A

**Rose@mthelpdesk.org**  
**Steven@mthelpdesk.org**

What is your biggest takeaway?





Please fill out the evaluation!

**NEXT WEBINAR**

# How to Engage Your Members for Endorsements

February 9  
3-5pm ET / 12-2pm PT

**Register at:**

<https://www.newleftaccelerator.org/the-base-power-learning-series>



**Check out the whole  
Base Power Webinar Series:**

<https://www.newleftaccelerator.org/the-base-power-learning-series>

# Base Power

## Learning Community Members

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## Learning Community

**THANK YOU!**