EXECUTIVE SUMMARY

Oakland Rising, as a connector and incubator for progressive campaigns led by Oakland organizations, has taken on an ambitious project to enhance organizing and fundraising capacity across its nine Partner Organizations. The Movement Technology Project, funded by a grant from the San Francisco Foundation’s Oakland Opportunity Fund, is a visionary and innovative effort to build the capacity of nine community-led member groups to develop technology infrastructure and canvassing efforts to engage individual supporters and amplify the voices and power of working class, migrant, and people of color in Oakland’s political process.

Launched in the spring of 2017 and delivered in partnership with DevLabs, an Oakland-rooted tech firm, the Movement Technology Project has four key components:

1. One-time re-grants of up to $15,000 to help make technology purchases;
2. A 9-month Fellowship that helps staff develop in-house technology expertise;
3. A cloud-based Partner Portal to facilitate data sharing and visualization across the collaborative to inform collective strategy, and
4. Development of a Fundraising Canvass to raise grassroots dollars and name recognition by doing door-to-door outreach.

This evaluation reports on the first two years of the three-year Movement Technology Project. It is informed by one-on-one interviews with Oakland Rising staff, Partner Organizations, Movement Technology Fellows, and DevLabs, as well as a review of planning documents, reports, blog posts, and emails.

Overall, this project is making strides in narrowing the digital divide for grassroots organizing groups, building capacity, and informing strategy—preparing and positioning Oakland Rising and its Partner Organizations for the crucial 2020 election cycle.
To date, Partner Organizations have approached this unique opportunity each at their own level of readiness and involvement, and all have gained something of value. Many have said that re-grant funds have helped take their technology to the next level, enhancing efficiency and thereby, impact in their work. Two partner groups – CURYJ and MUA - took part in the first Technology Fellowship, resulting in impressive gains in technological skills and the confidence to apply them. While the Partner Portal is behind schedule and the Fundraising Canvass is not yet at full capacity, commitment remains strong entering into the year ahead.

This effort has unfolded much like a “start-up,” with a similar energy of prototyping, testing, and then pivoting or adjusting based on emergent knowledge and information.

Lessons from this evaluation point to the following key recommendations:

• Take more time for planning, internal organizing amongst partners, and rolling out the program as Oakland Rising is comprised of its member organizations;

• Invest in a research phase for the Partner Portal in both the developmental and the implementation stages as this is something completely innovative, and

• Build more clarity and supports around the Fundraising Canvass;

• Lift up and develop the Fellowship as a model for the field.

CONTEXT AND BACKGROUND

In 2017, Oakland Rising, with grant support from The San Francisco Foundation through its donor-funded Oakland Opportunity initiative, launched the Movement Technology Project, designed to grow the effectiveness of civic engagement across its nine Partner Organizations and expand financial support from individual donors. These groups, so close to Silicon Valley, have been largely excluded from reaping the benefits of its tech innovation and wealth; this project seeks to remedy that. Building on its core strategy of voter education and mobilization, Oakland Rising recognized the opportunity to tap into technology as a tool for civic engagement and individual donor development "in order to collectively hold and exert progressive political power."

Technology holds the key to scaling up and out in this critical political moment.

-Oakland Rising
With the Movement Technology Project, Oakland Rising seeks to build the capacity of its nine base- and power-building Partner Organizations to secure long-term political and financial independence in their work to win policies that improve the quality of life for children, youth, and families in Oakland. **The Project has identified two distinct but mutually supporting strategies: 1) Grow technology capacity, and 2) Grow donors through canvassing.** The first invests in and develops technology infrastructure, with a focused intention to close the digital divide that places many grassroots organizations and the communities they come from in clear disadvantage. The second applies that technology to canvassing efforts to engage individual supporters, a key strategy to build power and develop independent revenue for the 2020 election cycle and beyond.

Partner Organizations include:
- The Asian Pacific Environmental Network (APEN)
- Bend the Arc Jewish Action Bay Area (Bend the Arc)
- Causa Justa :: Just Cause (CJJC)
- Communities United for Restorative Youth Justice (CURYJ)
- East Bay Alliance for a Sustainable Economy (EBASE)
- The Ella Baker Center for Human Rights (EBC)
- Mujeres Unidas y Activas (MUA)
- Parent Voices Oakland
- St. Mary’s Center

The Movement Technology Project includes four primary design components:

- **Re-grants of up to $15,000 per organization for technology equipment and infrastructure investments to support effective organizing;**

- **A 9-month Fellowship that develops in-house technology expertise within participating organizations;**

- **Development of a Partner Portal enabling secure data sharing and visualization across the collaborative to inform collective strategy, and**

- **Development of canvassing infrastructure to strengthen one-on-one outreach.**

Oakland Rising is partnering with DevLabs, a socially-oriented tech firm with an Oakland presence, to provide critical support to this project, including: 1) a Data Assessment that is being used to inform technology investments and the development of the Fellowship and Partner Portal; 2) training and mentorship through the Fellowship program; and 3) design and launch of the Partner Portal.
We’re not converting technologists into organizers, but **building organizers’ capacity** to have expertise in technology.

-DevLabs

**METHODOLOGY**

This evaluation report draws from the following sources, observations, and experiences:

- Development of theory of change and evaluation metrics;
- Interviews with Oakland Rising, Partner Organizations, and DevLabs, and
- Review of related reports, email exchanges, and blog posts.

The evaluation team helped Oakland Rising to develop a set of metrics to gauge short-term outcomes over three years. The measures for years 1 and 2 of the project are detailed as part of the summary of findings that follow.

**FINDINGS**

Already, Oakland Rising’s Movement Technology Project has provided game-changing support building the technological capacity of Partner Organizations—and there is still much to leverage. Overall, the technology re-grants and Fellowship program have proven successful, while the Partner Portal and Fundraising Canvass components will require more time to achieve their full intended goals.

In all areas, lessons learned have either already resulted in course corrections or are being folded into Oakland Rising’s plans for the coming year.
STRATEGY: GROW MOVEMENT TECHNOLOGY CAPACITY

• Completion of a data and technology assessment of all partner organizations by end of year 1.

A Data Assessment was conducted by DevLabs in the summer of 2017 to identify opportunities for Partner Organizations to use technology to grow their impact. The report—informied by documentation, interviews with Oakland Rising and Partner Organizations, and best practices from the field—identified both a desire among Partner Organizations and a great potential to use technology to support community leaders as well as develop and track individual donors, not only more effectively, but also with real authenticity.

“I know that there are tools and solutions out there that could help us track the quality of our relationships and the leadership of our members.”

– Participant Organization
(quoted in Data Assessment Report)

This assessment is being used as a roadmap for the initiative. Recommendations for success emphasize the importance of organizational buy-in and long-term, culturally-informed capacity building for staff.

“There is an opportunity to give Partner Organizations more equity by optimizing the way they use databases to reach more individuals. Smaller organizations have reported that 80% of the people who attend their events and actions are never entered into their databases, missing key opportunities to recruit members and donors. Organizations also reported on the difficulties of implementing new technologies: staff are sent to trainings but receive no follow-up support—they learn new technologies, but don’t have time to practice them. Some Partners have resorted to hiring consultants who turn out to have a lack of cultural competence and, hence, do not properly train staff.”

– DevLabs (from Data Assessment Report)

The Data Assessment also revealed the need to work more closely with Partner Organizations to strategize the use of data overall, including how to better align data collection with what data is desired as part of the Partner Portal but not yet being tracked (such as ethnicity and language).
Selection of at least five priority projects for the Innovative Engagement process.

Partner Organizations suggested 15 potential projects by spring of 2018. The core work with DevLabs will be the Partner Portal (addressed further below).

Projects developed through the Fellowship by the end of the year included:

- MUA’s custom-created app to record new members more quickly and efficiently, improve reporting to funders, and digitize and organize data;
- CURYJ’s series of projects addressing technological problems and opportunities, which included an electronic survey that connects to the organization’s existing Salesforce database, eliminating manual data entry;
- Oakland Rising’s project to digitize the information intake process for its field fundraising program, which has improved efficiency and cut costs.

The Fellowship is described in greater detail further below.

Completion of technology upgrades to expand paid and volunteer outreach by end of year 2.

One-time re-grants ranging from $5,000 to $15,000 were awarded to Partner Organizations. Several indicated that this funding to purchase technology has been impactful in helping them take their work to the next level.

“We have purchased upgraded computers, a projector and screen...and we have plans to purchase some tablets that can be mobile for organizing. It’s a huge step forward, to have technology match our organizing is really exciting and helpful.... We’ll be using our capacity in a different way, it’s a huge step forward.”

- Partner Organization

“Our tablets will arrive today.... When fully launched in the field, we want to eliminate whole steps currently taking lots of time and effort and intern support: signing people up to be members, writing down their info in the field then later data entry, etc. What will be different will be streamlining: on-the-spot donations, sign-ups, people will feel confident that if they do use a credit card it will not compromise their personal info. It will facilitate the organizing work.”

- Partner Organization
Some of these same organizations indicated that, due to capacity challenges, they were not ready to take advantage of other opportunities, like the Fellowship, so this re-grant component enabled Oakland Rising to “meet them where they are.”

“Because of [staff] leaves and transitions, our ability to fully participate is super limited. We are not able to participate in the Fellowship in 2019, and we’re very disappointed. But we did get a sub-grant. It’s incredibly useful to have resources for our variety of tech needs, which have skyrocketed because of the need for digital security, and this political moment.”
– Partner Organization

“I’m struggling to build the capacity we need to access the funds available and participate in the project. We want to participate in the Portal, but don’t have the needed capacity to do that. That has been a challenge: to match our capacity with the opportunity that’s available.”
– Partner Organization

**Two Fellows each from two partner organizations were trained to serve as in-house technologists and data managers by end of year 2.**

In April 2018, two staff and/or member leaders from CURYJ and two from MUA were identified to take part in the Fellowship, along with Oakland Rising staff member and Movement Technology Project Manager, Nemo Curiel. Staff turnover at CURYJ removed one of its participants from the program and a replacement was identified in August.

As this was the first time DevLabs worked with a cadre of community organizers, much was learned in the first weeks of the 9-month program about how to tailor their approach to participants’ needs and interests. Adjustments included taking more time to bring participants on board, including building trust and confidence for Fellows who were not accustomed to, or had been alienated by, academic settings. It also meant pivoting away from a formal, theory-based curriculum and moving more rapidly into practical applications that were meaningful to their organizing work.

In addition, materials were translated into Spanish within the first weeks to make learning more language-accessible; Oakland Rising is proud to be able to offer a bilingual curriculum for this valuable program as it continues to unfold and recruit more organizers to take part in this game-changing program.

"When the Fellows came on, we got push back about things like punctuality...not relevant to people outside of academic culture. We pivoted pretty quickly.... This
has been uncharted territory, triggering their previous experiences and not relevant to their needs. For the curriculum, we had this whole trajectory planned with HTML, JavaScript—they got really burnt out. We switched to CRM, and within a week they wanted to develop something useful for their organizations. The energy level totally changed as they were building skills they were good at, and that were useful for their organizing work.”

– DevLabs

The experience for Fellows has been empowering, both personally and for the capacity of their organizations.

“I got some coding skills and am learning how to navigate the Salesforce platform better. Those are hard, tangible skills. I also figured out that tech is something you can’t completely ever master—but I learned how to research things and get to answers when I don’t have them. I learned the importance of data in organizing. It sparked interest in me to further pursue coding and how to do it....

It will enable CURYJ to track the progress of our participants, assess their needs, track all this and layer our work on top—since it can in no way, shape or form take over one-on-one contact.

– Daniel Mendoza, Technology Fellow from CURYJ
Others see the same growth in Daniel, with Barni from DevLabs saying: “If the metric is having impact on their organizations, Daniel has exceeded all the metrics…. He’s doing things that are leader-like, he’s able to come with innovative solutions.” George Galvis of CURYJ adds: “It was always part of our vision to have the lived experience to take on stronger leadership roles in these functions, and Daniel’s emerged in that way.”

MUA Fellows have also shone in the program. Barni notes: “Better than expected is the relationship with MUA having come on full-force to support the Fellows. They’ve launched a digital literacy training for their community members on how to navigate computers, understand software, etc. to support the Fellows’ work.” It’s also notable that whereas Daniel is of the “digital generation,” MUA’s organizers are typically older.

“I’m new to technology at 53. I’ve learned a lot of things. I thought my age would be an obstacle, but I got the support and I not only finished but did well with the program. These challenges are things I will bring back to MUA where members are around my age…where adoption of technology is a factor. But it’s something I can do now and can show them they can do as well to evolve our organization….

Before the program, our information was scattered and not organized. Our member base is a lot of women who did not go to college or high school, so it has made it difficult to learn new tools, organize the information. This is something we need to report to foundations and for grants. What we’re learning here will help resolve and deal with that big problem.”

– Maria de Lourdes Reboyoso, Fellow from MUA

Nemo Curiel, Oakland Rising staff echoes what has been noted above about the importance of flexibility in the Fellowship’s design and delivery to be accessible and relevant to participants. Painting a picture of their experience, he says the results have been just what were hoped for.

They worked closely with counterparts in their home organizations, had meetings with their peers at DevLabs to go through wire frames, design ideas, brainstorming, etc. with guidance of DevLabs staff and mentors. It’s cool to see folks who’ve never done anything close to this developing the apps to transform how intake is done. This is exactly what we had hoped it would be.

– Nemo Curiel, formerly with Oakland Rising
First-year Fellows shared their work at a Graduation and Presentation Ceremony in December 2018. (See detail under the “priority projects” item above.)

Oakland Rising began to publicize the next Fellowship round also in December. Nemo indicates that outreach was intentionally more proactive about conveying the positive value of the Fellowship as well as the level of commitment required of participants, having noted that there was some misunderstanding about Fellows needing to set aside the time outside of their regular organizing responsibilities.

Jessamyn Sabbag, Oakland Rising’s Executive Director, also noted the potential of transitional opportunities for graduating Fellows to help onboard and mentor the new cohort. Despite concentrated recruitment efforts, only APEN applied for the second-round cohort.

In a pivot designed to capitalize on the success of the first cohort, the Fellowship will continue to invest in the work begun by CURYJ and MUA, supporting their efforts to complete minimum viable products for full implementation. This will build on strengths these technology leaders have already developed, help them keep this work a priority, and build lasting capacity more broadly within their organizations.

This second phase of the Fellowship will also more closely integrate the Partner Portal by supporting Fellow organizations’ readiness to be early adopters of the tool, including providing staff training in its use. APEN will also receive Fellowship support.

**Completion of a Partner Portal (a CRM shared across partner organizations) by end of year 2.**

The Partner Portal fell behind schedule in its development and roll-out, but has since regained momentum.

Originally, testing was to have occurred in July-August 2018, with data population, maps, and forms to be ready in September so it could be piloted with the November election. Oakland Rising shares that while DevLabs has been extremely attentive in supporting the Fellowship work, communication and responsiveness around the Portal project had been a challenge as well as an uneven understanding of the Portal and its purpose among Partner Organizations.

“One of the internal challenges about the Partner Portal is that it’s still organizing, it takes time to organize around a vision and refine it collectively. We’ll allocate 20 minutes at monthly meetings...but it’s a big lift to get folks on board.”

– Oakland Rising

One Partner Organization’s comments validates this sentiment: “I don’t feel totally clear about the Partner Portal. I don’t attend monthly meetings, so I’m not sure if I’m not there or missing it, or if there is not a clear space to discuss the Portal.”
By September 2018, initial development of the Portal included securing a central database, CRM plugins, and a dashboard for data visualization.

However, learning that sourcing voter information files would require an application to the Alameda County Registrar of Voters presented an unexpected hurdle, and the process is an involved one. While still in development, the Partner Portal is now in beta phase and under Oakland Rising’s active management, which has strengthened accountability and will ensure that momentum achieved will continue.

Engaging with Partner Organizations more collaboratively around the strategic use of data and how the Portal will enable this will also be a priority in the coming year.

**STRATEGY: GROW DONORS THROUGH DOOR-TO-DOOR CANVASS**

Design and implementation of a new fundraising strategy for individual donors.

The vision for the Fundraising Canvass is to convert from being a seasonal activity to year-round. To do this, Oakland Rising seeks to combine on-the-ground hours with phone outreach, both working in sync to increase individual supporters. A core team led by Sheryl Walton, with troubleshooting assistance from Oakland Rising’s Development Director Beth Gunston, supports this work.

It took some time to get the Team Lead position filled, and it has been a learning curve to provide necessary training and a clear job description and expectations for this new role.

Team turnover has also been a challenge, but not an unprecedented one, as Beth notes: “Canvassing is one of the fields that people burn out in.” The team is, as of this reporting, steady at four members, with recruiting underway for two more.

Having encountered some challenges around how to ensure Sheryl’s time was being used to best effect, the synergy between the Canvass and Fellowship proved beneficial.
“Having the Movement Technology Fellowship happening at the same time was very cool. Nemo created tech tools to streamline some of our processes, and that’s been huge. A big issue for us was to figure out how Sheryl would have enough time to do all the stuff we needed to do and the data entry. Once we got that automated by having Nemo create this form—and got our field folks equipped with tablets—it was major.”

-Oakland Rising

Another benefit to monitor for as the Canvass gears up to full capacity is jobs created. Beth calls this out as a highlight: “I was first thinking to have a year-round Fundraising Canvass to give our daily team a part-time year-round position (not just seasonal). We hired two people from the seasonal voter outreach team to become year-round fundraising team members... and this program has provided steady employment.”

**In all, the program has created four jobs to date, plus the involvement of interns and other part-time seasonal canvassers.**

Looking ahead, continuing to meet the human resource capacity needs, including the level of experienced team members, to make the Fundraising Canvass a success will require ongoing attention.

In the meantime, adaptability has proven to be key. For example, to effectively launch, the phone canvass needs a crucial mass of contacts, so it is not yet in full swing. However, the team was able to do a test run during the time that fires in Northern California made environmental conditions dangerous for going door-to-door. Beth says: “To accommodate the team to be indoors, we had them try out phoning. They phoned folks who had made donations in the last year, and response was good! Now we know if there are rainy or crazy days, we can handle these different situations.”

Overall, the Fundraising Canvass has taken longer than expected to develop, as it is very much being built from the ground up, and there are new lessons at every step of the way. Lessons learned with respect to fundraising results are described in the sections that follow.

**By end of year 1, fundraising teams of three will raise $140 per night. By end of year 2, teams will grow to six people and raise $170 per night.**

It has taken time to ramp up toward these goals. At the end of year 1, the three-person team had been raising around $10-$80 per night, well short of what was originally hoped. At the close of year 2, it was a team of four going out four days per week and the range had increased to $40-$400 per night. In all, as of August 2018, the team had raised a total of $24,000—half of the $48,000 goal.

Upon reflection, Oakland Rising is rethinking the $140 per night goal as perhaps an unrealistic expectation, as it was based upon the performance of a statewide voter
campaign—whereas this team is focused on Oakland. That said, it is keeping $140 as an average goal for the time being and expects improvements in the year ahead.

Lessons learned for improving these outcomes include:

• **Creating a bonus/incentive system;**

• **Increasing the number of doors knocked on each night, such as by starting shifts sooner to maximize time on the ground, and**

• **Recruiting, onboarding, and training team members who have fundraising and/or sales skills in addition to their passion for the work.**

While the fundraising goals have not been met, efforts to date suggest that the messaging being used is sound and benefits are being yielded in terms of visibility.

*It’s been great visibility for us. We go into every district in the City. The only one we didn’t spend a month in is District 3; in all the other six districts we were able to spend a month or two door-to-door.*

-Oakland Rising

Jessamyn shared a similar observation: “Name recognition is at least as important as the money, even if less quantifiable.”

Canvassing also includes outreach to and follow-up with past donors. In November 2018 in the immediate aftermath of the Camp Fire, and over the rainy winter that followed, the field team minimized exposure to the elements by calling previous donors by phone. In February 2019, they made phone calls to thank supporters at the same time as asking them for their support of striking public schoolteachers—building donor relations while encouraging civic action. This spring, canvassers will be returning to neighborhoods they visited a year ago to update donors on what their contribution helped to support and to ask them to give again this year.

Overall, the Movement Technology Project has required additional time in its ramp-up phase to put needed systems and personnel into place, and it is now better positioned to more fully implement its plans going into the final year of the project.
RECOMMENDATIONS

Based on these findings from years 1 and 2 of the Movement Technology Project, we offer the following recommendations for future development:

1. **Take more time for planning, internal organizing amongst partners, and rolling out the program.**

   Given the challenges around organizational capacity, recruiting and hiring key personnel, filling in details like an incentive structure for the Fundraising Canvass, and aligning behind shared goals for the Partner Portal, the Project would likely have benefited from more time for organizational development and buy-in, ramping up staff capacity to implement the plan, and putting other key decisions and systems in place prior to launch. This may require pushing back on funder timelines and expectations, but is an example of the virtue of “go slow to go fast.”

2. **Invest in a research and planning phase for the Partner Portal.**

   Given that this component encountered challenges in both technical project management and execution, as well as Partner Organization understanding and buy-in, it too would have benefited from more preparation upfront. It is entirely unrealistic to expect to kick off a project of this magnitude without a healthy planning phase.

   Although some lessons are bound to emerge only in the process of developing such an innovative tool, seeking out models of this particular type of database might have helped anticipate issues such as how to access voter data. And while DevLabs has been a strong local partner, there may have been other firms with greater specialized knowledge in electoral data platforms.

   Equally important, working with Partner Organizations to co-create goals for data collection and think strategically about its use earlier on in the process would build shared understanding of the Portal’s purpose and buy-in for its development. The Portal has
the potential to be a powerful tool, and it bodes well that it has the first-hand attention and guidance from Oakland Rising ED, Jessamyn Sabbag’s leadership.

3. **Build more clarity and supports around the Fundraising Canvass.**

Developing this kind of enduring movement infrastructure is part of syncing electoral and power-building roots for the long haul—and it takes time. This work requires ongoing attention to human resources, including recruiting, onboarding, and training team members who have fundraising and/or sales skills in addition to their passion for power building in communities of color and using grassroots methodologies.

This component could be strengthened by creating a bonus and/or incentive system and other structural ways to increase the number of doors knocked on each night (such as by starting shifts sooner to maximize time on the ground).

Setting realistic goals is also important, and attention will be needed to set expectations of nightly yield based on year one experience and yet still be ambitious.

While the initial fundraising goals have not been met, efforts to date suggest that the messaging being used is sound and benefits are being yielded in terms of long-term visibility for Oakland Rising.

4. **Lift up and develop the Fellowship as a model for the field.**

The Fellowship program hasn’t been without its lessons learned and necessary adjustments, but it has also inarguably been a high point of this project to date. As such, a capture of what has made it so impactful could be beneficial for others who may wish to address the digital divide for grassroots organizations and build community knowledge and capacity by implementing a similar program. Celebrate—and spread—success!
CONCLUSION

Oakland Rising’s Movement Technology Project is an ambitious effort to enhance crucial organizing and fundraising capacity across its network. This work has unfolded much like a “start-up,” through a process of prototyping and testing, and then pivoting based on new information and insights. Through this learning process, Oakland Rising and its Partner Organizations are positioned to have greater impact in amplifying the voices of the community. In March 2019, Oakland Rising will convene all Partner Organizations for a first-ever two-day retreat to engage in collective strategy development so that when the 2020 election cycle comes, Oakland residents will be ready.

This work fits into a broader context of efforts underway across the nation to build the capacity of grassroots organizations to build resident power and develop independent revenue models. Oakland Rising is deepening its knowledge and capacity in this area through the Solidago Foundation’s Independent Resource Generation Hub, where it is learning, alongside other progressive organizations across the country, how to develop resources in a way that lifts up community voices and frees groups from the constraints of mainstream philanthropy to enable political action and power-building for a thriving and equitable democracy.

Valuable lessons are being learned from this project in years one and two that bode especially well for the final year of this powerful and exciting effort.

Gratitude goes out to the following people for your time, candor and dedication to building movement success:
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