BASE POWER LEARNING COMMUNITY

The Base Power Learning Series
Key Questions and Tips From Webinars

Overview of This Resource

Many of the most impactful base-building organizations use multiple legal entities—often 501 (c)(3)s, 501(c)(4)s, political action committees (PACS), and/or other corporate entities—to build power and secure wins with and for their communities. But multi-entity base-building work is complex because it integrates numerous organizational departments (data, field, compliance, fundraising, etc.) across a family of organizations.

To address the complex, multi-departmental needs of multi-entity base-building organizations, The Capacity Shop and New Left Accelerator brought together a group of progressive intermediaries to form the **Base Power Learning Community (BPLC)**.

BPLC partners include: Alliance for Justice's Bolder Advocacy program, The Capacity Shop, The Center for Empowered Politics, Information Ecology, The Movement Tech Help Desk, New Left Accelerator, Progressive Multiplier, U.S. Federation of Worker Cooperatives, and independent consultants.

The BPLC created a six-webinar series covering multiple topics related to base-building, including:

- **Membership Models:** Developing multi-entity membership models
- **Member Engagement:** Engaging members across legal entities
- **Endorsements:** Creating a member-informed endorsements process
- **Fundraising:** Multi-entity fundraising
- **Data Management:** Managing data across legal entities

This document compiles the best key questions and tips that each webinar presenter identified as the high-level information that leaders might want to bring back to their organizations on each respective topic. We hope this resource provides leaders seeking to build a multi-entity membership program with a roadmap of key conversations that they might have with various departments within their family of legal entities. We also include links to the recorded webinars and to the topic-specific resources created for each webinar.

We hope you find this resource useful as you begin your multi-entity base building journey!

Membership Models & Member Engagement

Webinar 1 : Base Building & Multi-Entity Membership Models

WATCH RECORDING

Presenter: Jay Carmona, Sematonic Strategies

This introductory webinar helps build a foundation of understanding of the key questions and common model for base-building in the multi-legal entity context.

Webinar 3 : Using Your 501(C)(4) to Engage Your Membership

WATCH RECORDING

Presenter: Nijmie Dzurinko, Put People First PA

This webinar discusses the challenges and successes of engaging members across legal entities.

DOWNLOAD WEBINAR RESOURCE:

Definitions of Key Terms on Membership and Base Building

Key Questions To Bring Back To Your Organization:

1. Do we understand the type of power we need to have to win?

One goal of organizing is winning victories with and for your community. Consider working with your staff to assess the type of power and influence that will most help your community win critical policy battles (i.e., power mapping). Ask your team: What levers of power do we need to pull to achieve our theory of change? What types of power and influence would we need to wield to win our key goals and achieve our mission for our community? Who do we most need to influence? How can we most effectively direct our people and money to impact those people we most need to influence? Identifying the type of power you need to have to win can help determine what types of strategies to organize around.

2. Do we understand which organizing strategies will help us pull the most critical levers of power?

Once we know the types of power you need to have to win, you can be more strategic about how you engage members to exert their power and influence. Ask your team: What organizing strategies should each of our organizations be using (organizing and mobilizing) to pull the most impactful levers of power? Is our organization's membership model designed to support the strategies most likely to achieve our goals? Are we organizing in the right geographic locations to exert influence given our policy objectives? How are members involved in setting priorities? How can we center members in our work more directly? Are our members and community playing a critical role in designing our strategic priorities? If not, what would it look like to be more specific and targeted about the ways in which we design our organizing strategies and campaigns?

3. Do we have the right legal structures to engage in the organizing strategies that we want to use to build power?

The legal structures that you use to conduct your work and organize supporters matters. Ask your team: Given the strategies we believe are most likely to help us build power, do we have the right legal entities to execute those strategies? Are we clear about how we want to move members through a journey of engagement *across* our legal entities? Are the limitations imposed on our work by the legal structures we have limiting our ability to achieve change?

4. Does our family of organizations consistently define who members are?

Clarity and shared understanding of the different ways your organization engages your community is important. Ask your team: Are our organizations clear and consistent about how we define the different groups of people whom our organization touches? Do we make useful distinctions between levels of engagement? Do we have a clear understanding of who our members and leaders are (our most highly engaged leaders) versus our supporters (the many who support our work in some form) versus the community we mobilize (the broader group that we need to win key battles or need to turn out to vote in elections)? Would it help us prioritize our outreach if we distinguished between different levels of supporters and had more clarity about when each entity engages each type of supporters?

5. Are we collecting, analyzing, and sharing the data that helps us build and direct people power?

Ask your team the following questions: Does our organization effectively collect, analyze, and share data about our supporters/members across legal entities? What data do we need to collect to improve our understanding of our community and/or the impact of our organizing?

Tips to Keep in Mind in Your Work:

1. Clarify the strategies each legal entity will use when organizing members.

It is important for multi-entity organizations to achieve strategic clarity about which legal entities will lead certain strategies. Leadership, staff, and members all need to understand how the ladder of engagement works across the legal entities you use to build power.

2. Create shared definitions and language.

Clear and consistent organizational language and definitions are always important—but they are especially important when power-building work expands across legal entities. Ensuring that your family of organizations has clear written definitions that distinguish between different levels of community engagement (i.e., supporter, member, base) will help your staff align on the most effective strategies to organize and/or mobilize in a given campaign, and will increase your impact. *See our definition sheet below.*

3. Joint membership is a best practice.

If you have multiple legal entities, consider bringing all your members in through your 501(c)(4) and/or signing them up as joint members of both organizations from the outset. 501(c)(4) and/or joint membership helps to house data under your 501(c)(4) for maximum flexibility and allows dues to generate unrestricted funds for your 501(c)(4) work.

4. Center your community in your organizational structures and strategies.

Your legitimacy as an organization comes from your members and the people power you can demonstrate. When you are designing your membership and/or organizing model, be specific and clear about the role members play in decision making, leadership, and strategy in your organization. Consider how your organization centers and grows the leadership of your community and how those most impacted by injustice are leading the fight for change, your campaigns, and your organizational strategy.

Member-Informed Endorsement Process

Webinar 4 :
Power of the Membership: How to Engage Your Members for Endorsements

WATCH RECORDING

Presenter: Mo Manklang, Policy Director, U.S. Federation of Worker Cooperatives

This webinar shares tips and practices on how to design a member-informed candidate endorsement process to build power with and for your community.

This webinar was sponsored by NLA.

DOWNLOAD WEBINAR RESOURCE:

Endorsement Process Planning Tool

Key Questions To Bring Back To Your Organization:

1. Do we understand how engaging in an endorsement process will build power and influence for our organization?

A candidate endorsement process can be a critical tool for helping to build power and gain influence with elected officials. Endorsement processes allow you to be visible to decision makers, to flex the power of your community in electing critical decision makers, to ensure you have elected officials on the record for supporting your community and policy priorities, and to hold elected officials accountable to promises they made to secure your endorsement. It is important to be intentional about how the process will build power for your organization and help you accomplish your mission.

2. Do we have a clear process that allows us to be intentional about the design of our endorsement process this year?

Designing a thoughtful, value– and member–informed endorsement process can take time. If you're creating an endorsement process for the first time, make sure to allow enough time to plan a process that reflects your values and engages key stakeholders. Take a look at the Endorsement Process Planning Tool to help guide your planning process.

3. Do we understand what role stakeholders and/or members will play in the endorsement process?

A successful endorsement process is intentional about how to engage key stakeholders. Clarify the specific roles that your staff, board, and members will play in the process. If you are a membership organization, be intentional about centering members in the process. Providing clarity and transparency about the roles of all your stakeholders and your decision-making process will build trust and help maximize your people power.

4. Have we developed an accountability and co-governance plan to make our endorsement process impactful?

An endorsement process is most effective when you develop a plan to make the endorsements impactful. This generally means creating a plan that outlines how you will use your endorsements once they are made. How will we share the endorsement with our membership? With the public? What activities make our endorsement most meaningful? Will we organize members to work on behalf of a candidate if we're a (c)(4)? Do we have a (c)(4) or PAC to contribute money or make Independent Expenditures (IE's) on behalf of the candidate? How will the candidate know the role our members and our endorsement played in their victory? What data or information are we tracking to share with others about the impact of our endorsement (*we knocked on # of doors on your behalf, turnout increased X % because of our work,* etc.)?

5. Do we have the right legal counsel to help us understand the laws that govern political activity?

When designing an endorsement process, it's important to understand state, local, and federal rules that govern political activity. Make sure to talk to an attorney who understands campaign finance and relevant state and IRS rules before you design your process.

Tips to Keep in Mind in Your Work:

1. **Begin with strategy.**

Endorsements are not linear but should be a part of a strategic plan and a circular process that serves your organization's greater goals. Your endorsement will be most impactful if the candidate understands you helped them win. Your job is to make the candidate and/or elected official understand that they are accountable to your community and members, and that they should care about your policy issues and take your calls. If you are considering making an endorsement, make sure you develop a larger strategy around how the endorsement builds power for you that helps you pass your policy agenda. Endorsements are most impactful when they are part of a larger accountability and co-governance strategy.

2. **Benchmarks will help you design an effective process.**

Take time to clearly map out the benchmarks of your endorsement process. Include critical steps like a strategic goal-setting process, stakeholder engagement planning and executions, development of criteria for making endorsements, planning and resources for promoting your endorsement (i.e., press coverage), and strategies for post-election accountability. Make sure your endorsement process is infused and integrated with your organization's field activities: events, programs, and actions.

3. **Allow for sufficient time.**

Designing a value– and member– informed endorsement process can take more time than you think so plan ahead. Rushing the process can lead to mistakes and unintended consequences and can create discord or misalignment among stakeholders. Take the time to plan, integrate stakeholder and member input, and align the process you design with your values.

4. **Consider the ramifications.**

Endorsements can create new opportunities—and, occasionally—new challenges. Make sure you think through the internal and external impacts that endorsements may have on your organization. Will we engage in primary endorsements? What happens if our members and board or staff are not aligned on the process or the candidate? Have we sufficiently engaged members in the process? What if an affinity candidate from our community is not as progressive or aligned on our policy issues as a non-community candidate? How will conflict or disagreements about the endorsement process be resolved? How will we ensure equity is integrated into the process? Does staff have the capacity to execute the process well?

5. **Get the right legal advice.**

A patchwork of federal, state, and local laws can govern partisan candidate endorsements. Take the time to get the right advice from the right people —consider the need for a campaign finance and/or political law attorney. Often endorsement work requires a different attorney than a traditional nonprofit attorney you may have worked with in the past. Good legal advice can ensure that you are able to do bold work safely.

Fundraising Across Legal Entities

Webinar 5 :
Resourcing the Base: C3/C4 Fundraising and Dues

WATCH RECORDING

Presenter: Bethany Maki, Executive Director, Progressive Multiplier

This webinar walks through tactics and practices for revenue generation that help multi-entity organizations mobilize money for power-building work.

DOWNLOAD WEBINAR RESOURCE:

Chart of Power Building + Resource Building Activities

Key Questions To Bring Back To Your Organization:

1. Has our organization evaluated the strategic benefits and reasons for diversifying our revenue portfolio?

The progressive ecosystem, and most organizing groups within it, are primarily funded by institutional philanthropy. This creates an unbalanced revenue generation portfolio, and an unbalanced revenue generation portfolio can create risks to our work. Discuss these risks by asking the following with your team: How often do we have to alter our programs to appease funders? Do we face funding variability that leads to an inability to retain staff and/or infrastructure in off election years? Might we lose key revenue due to funding variability (i.e., funders undergoing a "strategic refresh" or priority change)? Might we lose funding if election officials change?

2. How can we do this work grounded in our values while facing systemic barriers to fundraising?

There are systemic barriers to both raising (c)(4) revenue and to any revenue generation program. Naming and discussing some of these barriers—and others like them—can help ensure your approach is rooted in your values. Topics for discussion can include: *White supremacy in fundraising; storytelling without re-traumatizing; fear of risk from philanthropy; and lack of resources for the work.* These and other barriers you might encounter in (c)(4) revenue generation are not insurmountable, but they do require you and your staff to be thoughtful, strategic, and intentional when setting up your multi-entity independent revenue generation program. Grounding your program in your values from the start will reap benefits later on.

3. Does raising independent resources align with our organizational and base-building strategy?

Just as you must develop different strategies for organizing different sectors of your communities, you must develop different strategies for mobilizing money from the communities you organize. Be clear about your strategy for each different sector of your base (i.e., deep base, mass base). Often when revenue programs are first beginning, the primary method of raising money is an organization's *deep base* (i.e., your core supporters and leaders). This provides accountability to those most engaged in your work, and is often the keystone of most organizing group's first independent revenue plans. However, mobilizing your *mass base* can also provide financial resources to support scale. Raising money from this broader audience, however, requires more resource and time-intensive tactics, like small dollar donation programs, events, commerce, etc.

4. Does our organization have the human and financial resources and the right support to execute our chosen strategies and tactics?

There are two primary tactics that multi-entity organizations commonly use to maximize (c)(4) revenue: (1) *sharing data; and* (2) *moving money strategically between entities.* Executing these and other tactics requires a purposeful plan. Access to the right legal and capacity support for your team is critical. You may need to talk to a lawyer, support your financial and data teams in acquiring multi-entity knowledge and skills, or build new systems, processes, and/or platforms. Get curious about the resources and support you and your team will need for this work.

5. How can we leverage what we are great at to raise revenue?

What are you great at? The most successful revenue generation projects lean into what you are already great at. For example, relational organizing lends itself well to peer-to-peer fundraising. If you're a group that publishes a lot of content, could you build a subscription model? Do you already have mid-level or major individual donors? Would they be willing to host house parties for you, or start a giving circle with you? Bring your team together to consider what areas of your current work you might lean into to raise more independent revenue.

Tips to Keep in Mind in Your Work:

1. Aim for more independent revenue to design an overall revenue generation mix model that's right for your organization.

Aiming for more balance between institutional and independent sources of revenue can protect your organization against having too much revenue (and arguably power) at risk. It is important to spend time with your team to assess how a more diverse, balanced revenue generation portfolio might set your family of organizations and your work up to scale while defining your own agenda. Consider if one day you might reach a 50/50 balance between foundation funds and independent revenue.

2. Do an entity check.

Your legal structures directly impact the systemic change that you and your organization can accomplish. Take the time to evaluate if you have the right types of legal entities to create the change you want to see in the world. It is also important to understand the different types of revenue that different legal entities can generate (for example, money that comes into a (c)(3) can't be used for political activity, but revenue that comes into a (c)(4) can).

3. Check for staff capacity.

"If you build it, they will come" said no fundraiser ever. Revenue generation must be intentional and resourced with staff time. It takes project management and work time, and staff need bandwidth to do both. Make sure you are dedicating sufficient staff time to your revenue generation strategy. Sufficient staff capacity will lead to better results, staff retention, and will likely help you build a culture in line with your values.

4. Check for staff and volunteer skills and training needs.

If you don't have development staff, you have to lean into revenue generation that leverages the skill-sets of your other staff, or train them. Take the time to understand the skill set of your staff, to assess what additional skills or support you might need to support your program, and to consider what learning and training opportunities or capacity support might help your staff succeed. Also, don't forget that volunteer leaders are tremendous revenue generation partners! Be strategic about your volunteer resources and think broadly about what networks your volunteers have that may open revenue generation opportunities like corporate sponsorships.

5. Invest in your revenue generation program.

You need to invest money to make money. It is important to create a budget for your revenue generation work. Be clear about what resources you will dedicate to your program – and rightsize your expectations. If you have limited resources, start small. Consider seeking grants for experiments and/or building capacity, and find capacity-building partners with the right experience and expertise to support and collaborate with you.

Managing Data Across Legal Entities

Webinar 6 : **Membership and Data: Data for Building Power**

WATCH RECORDING

Presenter: Rose Espinola, Founder, Movement Tech Help Desk

This webinar walks organizers through key questions and answers about how to utilize and manage powerful data across legal entities.

DOWNLOAD WEBINAR RESOURCE:

Multi-Entity Data Resources Sheet

Key Questions To Bring Back To Your Organization:

1. What metrics can we collect in election years to support community organizing?

You reach out to many, many voters during election years and this is a real opportunity. Touching so many people allows you to identify supporters, and invite them to take action with you for advocacy (both (c)(3) and (c)(4) activities). When going into an election year, decide what kind of data would be most useful to your long-term organizing work. When doing voter registration calls, would it be helpful to ask the top issues the voter cares about or to know if they're interested in receiving updates or in taking direct action? If you offer services, might you want to share those and ask which ones they might be interested in? If yes, ask for their cell phone number and email, and permission to call, text, and email and develop systems to collect, track, and analyze and then use the data (i.e., follow up).

2. Does our staff have shared language and definitions around legal compliance, data, and organizing?

As organizers, you know that language matters. It can be hard to align teams if you don't have shared definitions. It can help to ensure your organization has written definitions of "member," "supporter," "data," "(c)(3) activity," and "(c)(4) activity." Consider evaluating your team's alignment on language and developing a glossary to support shared understanding.

3. Are we engaging our data staff from the start?

To create a data-informed organization and strategy, you need to bring your data staff into early conversation when you are planning campaigns or developing surveys or scripts. Collaborate with them from the start. Ask your data staff key questions such as: What metrics are we able to track with our tools? How can we ensure we follow up with target supporters via email, text message, phone banking, and/or one-on-ones?

4. Do we know how to accomplish what we want to accomplish legally? Do we know who to ask?

There are no clear-cut answers as to how data must be structured to comply with the law. Rather, organizations and staff must base decisions on a mix of strategy and organizational tolerance for risk. It is important to know when to ask questions and who to go to when you have questions. Consider offering your data team training and support and/or access to legal counsel so they know who to ask for questions. Consider designating a point person in your organization whom staff can go to with any legal questions, and ensure that person is empowered to work closely with your attorney. Building an organizational culture that fosters asking questions to the right folks is more important than knowing the answer.

5. Do we have good data collection processes in place?

Your internal processes and practices for data collection matter. Make sure you have a clear process for submission and management of data. Those processes should address how key data is submitted, how data is synced among tools, and how data is shared between legal entities (e.g., your (c)(3) and (c)(4)).

Tips to Keep in Mind in Your Work:

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

Data can help your organization follow up with supporters, understand member needs, tell members stories, make decisions, and show impact. Begin every campaign or program asking what your goal or demand is, what tactics you will use, and what metric goals will help you focus on your team and measure your impact. Data can also help elected officials understand how many supporters you have in their district and/or help your staff determine how best to leverage member engagement strategically to achieve your goals. Consider what other data helps your organization make informed strategic decisions and leverage power effectively.

2. **Build your dream team.**

Invest in data talent. If data is critical to your strategy, you need data staff. And you need a team around that data staff – consider how your organizing team, compliance team, strategy team, and data team might work together.

3. **Joint acquisitions is a best practice!**

If you work at a multi-entity organization, it matters how the data comes into your family of organizations. Setting up joint acquisition of data for the (c)(3) and the (c)(4) is a best practice. This is often called list sharing. Talk with your organizing and executive team about how and whether to adopt joint acquisition practices at your organization. More detailed information on the topic of joint acquisition can be found in Bolder Advocacy's webinar "501(C)(3) and (C)(4) Membership Programs: Navigate the Law" and in their publication *The Connection* (pg 52).

4. **Your 501(c)(4) must pay market value for 501(c)(3) data.**

Your (c)(4) can rent, buy or swap data—but it must pay fair market value for it. See additional information in the webinar deck or read tips from Bolder Advocacy (included in the resource sheet below) to learn more about fair market value.

5. **Don't skip on training—invest!**

Data and technology are constantly changing. Ensure your organization has a learning culture around data. Support your data staff in continuous learning and provide them with access to learning opportunities for data specialties, data peers, and legal compliance experts. But don't stop with your data team—ensure your entire staff have shared definitions around data.