

# Digital Infrastructure and Integrated Organizing: Technology, Data, and the Human-Digital Balance in MOO Campaigns

## Executive Summary

Modern Massive Open Organizing operates at the intersection of two worlds: the deeply human world of relationships, stories, and face-to-face commitment, and the digital world of platforms, data, automation, and networked communication. Getting the balance right — using digital tools to amplify and extend the human work of organizing without substituting digital engagement for relational depth — is one of the most important and most difficult challenges in contemporary MOO practice.

This guide addresses the digital infrastructure of MOO: the specific tools, data systems, and digital practices that allow large-scale organizing to operate efficiently; the principles that should govern digital infrastructure decisions; and the art of integrated organizing — combining digital and in-person engagement in ways that leverage the strengths of each. It also addresses the risks that digital infrastructure poses to organizing — the temptation to measure digital metrics as though they were organizing metrics, to substitute automation for human connection, and to treat the database as the organization.

This is not a technology guide in the narrow sense. The specific platforms and tools available change rapidly, and any detailed platform comparison is likely to be outdated within a year. What this guide provides instead is the strategic framework for digital infrastructure decisions — the principles, questions, and trade-offs that remain relevant regardless of which specific tools are currently available.

## Evidence Table

| Key Finding                                                                                                                                                                                      | Strength                                                   | NGO Implications                                                                              |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| Integrated digital-plus-relational campaigns produce significantly higher participation rates, deeper commitment, and greater willingness to take high-cost actions than digital-only campaigns. | High (political organizing and advocacy research, 2012–24) | Digital tools amplify relational organizing; they do not replace it.                          |
| Personalized, segmented communications — tailored to the participant's history, interests, and engagement level — significantly outperform broadcast communications on every engagement metric.  | High (digital marketing and advocacy research)             | Segmentation and personalization are not marketing luxuries — they are organizing essentials. |
| Mobile-first design is essential for campaigns targeting younger audiences and participants in developing countries.                                                                             | High (digital access research)                             | Default to mobile-first in all digital organizing design.                                     |

| Key Finding                                                                                                                                                                   | Strength                                    | NGO Implications                                                               |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------|--------------------------------------------------------------------------------|
| Data quality — the accuracy, completeness, and currency of participant data — is a more important predictor of digital organizing effectiveness than platform sophistication. | High (organizing data practice literature)  | Data hygiene and quality investment outperforms platform upgrade investment.   |
| Privacy and data ethics failures erode participant trust and produce significant organizing damage — more than most organizations anticipate.                                 | High (digital rights and privacy research)  | Data ethics is an organizing value, not just a legal compliance requirement.   |
| Organizations that train organizers in digital tool use, not just communication staff, achieve significantly better integration of digital and relational organizing.         | Moderate (organizational practice research) | Digital tool training should target organizers, not just communications teams. |

## Step-by-Step Framework

### Step 1: Build Your Digital Infrastructure Stack

A MOO campaign's digital infrastructure stack typically includes several layers of tools, each serving a distinct function:

**Constituent Relationship Management (CRM):** The database that tracks all participant interactions — who is in the campaign, what actions they have taken, their engagement level, their contact information, and their organizing history. The CRM is the central nervous system of the digital organizing operation. For large-scale campaigns, a dedicated organizing CRM (such as NGP VAN, EveryAction, ActionNetwork, or Nation Builder) is essential. For smaller campaigns, a well-maintained spreadsheet with consistent data entry practices can serve the function.

Key CRM requirements for MOO:

- Ability to track engagement level (participation ladder position) for each contact
- Ability to segment lists by engagement level, geography, issue interest, and other relevant criteria
- Integration with email, SMS, and other communication tools
- Ability to track organizing activities (one-on-ones conducted, meetings hosted, recruits brought in) by organizer

**Communication tools:** Email remains the highest-reach and highest-engagement digital communication channel for most organizing campaigns. SMS/texting (including peer-to-peer texting, in which organizers send individual texts to supporters) has higher open rates and is more effective for urgent asks and personal outreach. Social media platforms serve a broadcast and awareness function but are generally less effective for deep organizing engagement. Voice calls remain important for high-priority asks and relationship maintenance.

**Event and meeting management:** Tools for hosting virtual meetings (Zoom, Google Meet), managing event registration (Mobilize, SignUpGenius), and coordinating in-person gatherings are part of the standard organizing infrastructure.

**Peer-to-peer organizing tools:** Tools that enable participants to contact their own networks — peer-to-peer texting platforms, relational organizing tools (like Outreach Circle or Empower) that allow participants to identify and reach out to contacts in their own networks — are among the highest-value digital organizing investments for MOO campaigns.

**Volunteer and organizer management:** Tools for managing organizing activities — assigning tasks, tracking completion, managing leadership development progress — are distinct from the CRM but often integrated with it.

**Principle for infrastructure decisions:** Choose tools that your organizers will actually use, not the most sophisticated tools available. A CRM that is too complex for local organizers to use is worse than a simpler tool used consistently. Default to the minimum viable stack that meets your actual organizing needs.

## **Step 2: Master Segmentation and Personalization**

The single most powerful upgrade available to most digital organizing programs is improved segmentation and personalization: moving from broadcast communications (the same message to everyone) to targeted, relevant communications tailored to the recipient's specific engagement history and interests.

### **Why segmentation matters in organizing:**

A message asking a first-time petition signer to host a house meeting is not just ineffective — it is confusing and off-putting. The same message asking a three-year organizer who has not recently been active to reconnect is appropriate and resonant. The same list, the same ask, sent without segmentation, produces both ineffective outreach and inappropriate asks.

### **Basic segmentation dimensions for MOO:**

- Participation ladder level (as discussed in Guide 2)
- Engagement recency (active in last 30/90/180 days)
- Geography (local chapter, region, national)
- Issue or campaign interest (where you have this data)
- Organizing activity (has hosted a meeting, has conducted one-on-ones, has recruited others)

### **Personalization beyond segmentation:**

The most powerful personalization uses specific organizing history in communications: "Thank you for hosting the November house meeting in your neighborhood — your participants have now taken over 200 actions." This level of personalization requires accurate CRM data, but it produces significantly higher engagement than even well-segmented generic messages.

### **The dynamic ask:**

Design your communication sequences so that the ask evolves with the participant's engagement level. A participant who has just signed up receives a first-action ask. A participant who has completed three actions receives a local group invitation. A participant who has attended three local meetings receives a facilitator training invitation. This "dynamic ask" structure is the digital implementation of the participation ladder.

## **Step 3: Design Peer-to-Peer Organizing Infrastructure**

The most powerful digital organizing tool is not email, social media, or CRM — it is the network of personal relationships that participants already have. Peer-to-peer organizing tools enable participants to reach people in their own networks, extending the campaign's reach into communities that broadcast communications cannot access.

**Relational organizing tools:** Platforms like Empower, OutreachCircle, and Hustle enable participants to identify contacts in their own networks who might be interested in the campaign, and to send personalized outreach messages to those contacts through their own phones. The research on relational organizing consistently shows that these personal asks from trusted peers are dramatically more effective than equivalent asks from the organization directly.

**Peer-to-peer texting:** P2P texting platforms enable organizers to send individually personalized text messages at scale — appearing to come from a specific person rather than a generic campaign number. P2P texting has significantly higher open and response rates than broadcast email for similar asks.

**Social media as organizing infrastructure:** Social media platforms serve a peer-to-peer function when used for genuine relational sharing (participants sharing their own stories and inviting their own networks) rather than broadcast amplification (the campaign sharing content at its followers). Train organizers to use social media relationally — sharing personal stories and specific invitations — rather than just resharing campaign content.

**The most important P2P investment:** The training and support of organizers in having genuine relational conversations online and in-person with people in their own networks. Technology is the tool; the skill is the organizer's ability to have an authentic, values-based conversation with someone in their network about why they care about this issue.

## **Step 4: Manage Data with Ethics and Discipline**

The data that a MOO campaign accumulates about its participants — contact information, engagement history, stated interests, personal stories shared in organizing contexts — is both an organizing asset and a significant ethical responsibility. Managing it well requires both technical discipline and genuine ethical commitment.

### **Data quality discipline:**

MOO data quality requires consistent, disciplined data entry practices across the entire organizing operation — not just among professional staff, but among local organizers who are entering meeting attendance, tracking one-on-ones, and recording commitments. Data

quality investment (training, regular audits, clear data entry protocols) consistently produces higher ROI than platform upgrades.

Key data quality practices:

- Regular data audits: identify and resolve duplicates, outdated contact information, and missing engagement data
- Clear data entry protocols: what gets entered, when, by whom, in what format
- Organizer training in CRM data entry as a standard part of organizer onboarding
- Regular data quality reviews in organizing team check-ins

Data ethics:

Participants share their personal information — including, in organizing contexts, deeply personal stories and vulnerabilities — in a context of trust. That trust carries specific ethical obligations:

*Transparency:* Participants should know what data you hold about them, how you use it, and who can access it. This requires a clear, honest privacy policy (not a legal boilerplate document but a genuine explanation of your data practices) and ready access to data deletion requests.

*Minimization:* Collect only the data you genuinely need for organizing purposes. Collecting data speculatively — "we might find this useful someday" — is both ethically problematic and practically counterproductive (more data you do not use is more data to manage and protect).

*Security:* Participant data must be protected against unauthorized access. This requires basic cybersecurity practices: strong passwords, two-factor authentication, encrypted storage, and access controls that limit data access to people who need it.

*Consent for advocacy use:* Personal stories shared in organizing contexts should not be used in public communications without the explicit consent of the person who shared them.

Data ethics as organizing value:

Data ethics is not just a legal compliance requirement — it is an organizing value. Participants who trust that their information will be handled responsibly are more willing to share and engage deeply. Data ethics failures — breaches, misuse, or opaque practices — damage participant trust in ways that are slow to repair.

## Step 5: Integrate Digital and In-Person Organizing

The most effective MOO campaigns are integrated: they use digital tools to extend and amplify relational organizing, and in-person organizing to deepen the relationships and commitment that digital tools cannot build. Neither purely digital nor purely in-person organizing is as effective as thoughtful integration of both.

Digital to in-person pathways:

The most important integration design challenge is converting digital participants — people who have engaged with the campaign online — into in-person participants. This conversion is where organizing depth is built. Design explicit digital-to-in-person pathways: every digital

communication sequence should include invitations to in-person activities (local group meetings, events, training sessions), and digital outreach should be supplemented by personal (phone or text) follow-up for participants who are close to the participation ladder transition.

#### **In-person to digital amplification:**

Every in-person organizing activity should feed back into the digital infrastructure: meeting attendance is entered in the CRM, participants who express interest in deeper engagement are followed up digitally, and the energy of in-person activity is amplified through participant social sharing. In-person activities that produce no digital data and no digital follow-up are organizing opportunities that are only half-utilized.

#### **The hybrid organizing session:**

As online meeting tools have matured, hybrid organizing sessions — with some participants in-person and others joining remotely — have become standard. Hybrid sessions are more complex to facilitate effectively (in-person participants tend to dominate, and remote participants tend to disengage) but they significantly expand the geographic reach of local organizing activities. Design hybrid sessions deliberately: assign a specific facilitator for remote participants, use digital tools (polls, breakout rooms, shared documents) to equalize participation, and ensure that commitment-taking and follow-up processes work equally for in-person and remote participants.

#### **The post-event digital workflow:**

Within 24 hours of any organizing event, a standard digital workflow should execute: attendance entered in CRM, thank-you message sent to attendees, follow-up asks made to participants who indicated interest in deeper engagement, and social sharing content provided to participants who want to amplify the event. This workflow is what converts event energy into organized momentum.

## **Step 6: Measure What Matters in Digital Organizing**

The abundance of digital metrics — opens, clicks, shares, impressions, followers, sign-ups — creates a persistent risk of mistaking marketing metrics for organizing metrics. Digital organizing measurement requires a discipline of tracking only the metrics that reflect genuine organizing outcomes.

#### **The organizing metrics hierarchy:**

**First priority — organizing actions:** Activities that build genuine organizing capacity: one-on-ones conducted, meetings hosted, participants recruited, leaders developed. These are the metrics that directly measure organizing progress.

**Second priority — engagement depth:** Metrics that measure genuine participant engagement: participation ladder transitions, repeat action rates, local group formation and activity, commitment follow-through rates. These measure whether the organizing is producing genuine depth.

**Third priority — scale indicators:** Metrics that measure the breadth of organizing reach: active participant count, local group count, geographic coverage. These matter, but only in the

context of engagement depth — scale without depth is not organizing.

**Not primary — digital vanity metrics:** Social media followers, website traffic, email opens, petition signatures. These are useful for communications assessment but should not be reported as organizing metrics or used to drive organizing strategy.

#### **The organizing dashboard:**

Design a simple organizing dashboard that tracks the metrics that matter most: active participation rate, participation ladder distribution, leader development throughput, local group activity, one-on-one volume, and commitment follow-through rate. Review this dashboard weekly with the organizing team.

## **Tools and Templates**

**Digital Infrastructure Stack Assessment:** A checklist of core digital infrastructure requirements for MOO campaigns: CRM (capabilities checklist) | communication tools (email, SMS, P2P) | event management | peer-to-peer organizing tools | data security practices.

**Segmentation Matrix:** A template for designing your core audience segments: segment name | definition | appropriate ask level | communication tone and content | frequency.

**Data Ethics Policy Template:** A concise, honest document (not legal boilerplate): What data we collect | Why we collect it | How we use it | Who can access it | How long we keep it | How to request deletion | How we protect it.

**Post-Event Digital Workflow:** A step-by-step process for the 24-hour post-event follow-up: attendance data entry → thank-you communication → follow-up asks → social sharing assets distribution.

**Organizing Dashboard Template:** A weekly tracking spreadsheet: active participants (total and % of database) | participation ladder distribution | one-on-ones conducted | meetings hosted | participants recruited | leaders developed | commitment follow-through rate.

## **Case Vignettes**

### **Case Vignette 1: Relational Organizing at Digital Scale — The Obama 2008 Ground Game**

The Obama 2008 presidential campaign remains the most studied example of integrated digital and relational organizing at massive scale. The campaign's ground operation — coordinated through a purpose-built CRM (the first major use of VAN in a presidential campaign), managed through a network of neighborhood team leaders, and fueled by a relational organizing model trained by Marshall Ganz — demonstrated that digital infrastructure could amplify relational organizing without replacing it.

The key innovation was the neighborhood team structure: local teams of 5–15 volunteers, each led by a trained team leader, connected to a regional organizing infrastructure through

the CRM. Digital tools — email, the CRM, and the campaign's social platform ([my.barackobama.com](http://my.barackobama.com)) — handled scale: mass communication, event coordination, and data management. Relational organizing — one-on-one conversations, house meetings, neighbor-to-neighbor outreach — handled depth: the persuasion, commitment-building, and voter contact that required genuine human connection.

The result was a ground operation that enrolled and activated a scale of volunteers unprecedented in American presidential politics, while maintaining the relational depth that produced genuine voter contact rates rather than mere digital engagement numbers.

Key lessons: (1) Digital infrastructure is the scaling layer; relational organizing is the depth layer. Neither works at scale without the other. (2) Neighborhood team structure — small groups with genuine relationships and real agency — is the organizing unit that makes large-scale coordination possible. (3) CRM investment in data quality (accurate voter files, consistent organizer data entry) was as important as the platform itself.

## **Case Vignette 2: Data Ethics in Practice — A Trust Breach and Its Consequences**

A national environmental advocacy organization running a large-scale organizing campaign experienced a significant participant trust breach when it was discovered that personal stories shared by participants in organizing contexts — stories about personal experiences of environmental harm, shared in confidence in local group meetings — had been used in a fundraising campaign without the explicit consent of the individuals involved.

The breach was not malicious: a communications staff member, looking for compelling fundraising content, had reviewed CRM notes from organizing sessions and used stories that seemed appropriate without considering whether consent had been given. But the impact was significant: when word spread through the organizing base (primarily through social media, faster than the organization could respond), participation rates dropped measurably, several established local organizers resigned, and the organization's reputation for participant respect — a core element of its organizing culture — was seriously damaged.

The repair process took two years and included: public acknowledgment of the breach and a direct apology to affected individuals; a complete redesign of data governance policies; mandatory training in data ethics for all staff with CRM access; and a deliberate campaign to rebuild trust with the organizing base through transparency about the new policies and consistent demonstration of changed practices.

Key lessons: (1) Data ethics breaches in organizing contexts are more damaging than equivalent breaches in marketing contexts — because organizing is built on trust of a qualitatively different kind. (2) The distinction between "data entered in a work system" and "stories shared in confidence" needs to be explicit and enforced — it will not be respected through intention alone. (3) Repair requires acknowledgment, changed practice, and time — all three are necessary, none is sufficient alone.

## Metrics and KPIs

| Metric / KPI                          | What It Measures                        | How to Measure                                  |
|---------------------------------------|-----------------------------------------|-------------------------------------------------|
| CRM data completeness rate            | Data quality health                     | Monthly data audit                              |
| Digital-to-in-person conversion rate  | Integration effectiveness               | Event registration vs. digital participant base |
| Peer-to-peer outreach rate            | Relational organizing digital extension | P2P tool analytics                              |
| Post-event workflow completion rate   | Digital follow-up discipline            | Workflow tracking                               |
| Organizing dashboard review frequency | Metrics discipline                      | Meeting records                                 |
| Data ethics incident rate             | Trust and compliance health             | Incident log                                    |
| Organizer CRM competency rate         | Digital tool adoption                   | Training records                                |

## Risks and Mitigations

**Risk:** CRM becoming too complex for local organizers to use, resulting in poor data quality.

**Mitigation:** Prioritize simplicity in CRM design. The minimum data that organizers need to enter consistently is more valuable than comprehensive data entry that is inconsistently completed.

**Risk:** Digital-first bias producing shallow organizing that looks like scale but lacks depth.

**Mitigation:** Apply the organizing metrics hierarchy consistently. Report organizing metrics (one-on-ones, meetings hosted, leaders developed) alongside digital metrics. Never report digital metrics without organizing context.

**Risk:** Data breach damaging participant trust and organizing capacity.

**Mitigation:** Invest in data security and data ethics proactively — before a breach, not in response to one. Implement explicit consent processes for the use of personal stories in public communications.

**Risk:** Platform dependency — over-reliance on a single digital platform that changes its policies or becomes unavailable.

**Mitigation:** Maintain participant contact information in your own CRM regardless of which platform you use for communication. Build multi-channel communication redundancy (email + SMS + in-person contact networks).

## Implementation Checklist

- [ ] Digital infrastructure stack assessed against MOO requirements; gaps identified
- [ ] CRM configured with participation ladder tracking and organizing activity fields
- [ ] Segmentation matrix developed for core participant segments

- ☐ Peer-to-peer organizing tool assessed and piloted with organizer team
- ☐ Data ethics policy drafted, reviewed, and published
- ☐ Organizer CRM training completed
- ☐ Post-event digital workflow documented and tested
- ☐ Organizing dashboard established with weekly review rhythm
- ☐ Digital-to-in-person conversion pathway explicitly designed into next campaign
- ☐ Data security audit completed; two-factor authentication and access controls in place

## Glossary

**CRM (Constituent Relationship Management):** The database system that tracks all participant interactions, engagement levels, and organizing activities. The central nervous system of the digital organizing operation.

**Data Ethics:** The set of values and practices that govern how participant data is collected, used, protected, and respected. An organizing value, not just a legal compliance requirement.

**Digital-to-In-Person Pathway:** The explicit design that converts digitally engaged participants into in-person organizing participants — the transition point where organizing depth is built.

**Integrated Organizing:** The combination of digital tools (for scale, coordination, and data management) and relational organizing (for depth, commitment, and leadership development) in a coherent MOO campaign.

**Peer-to-Peer (P2P) Organizing:** Organizing approaches in which participants reach out to people in their own personal networks — dramatically more effective than equivalent organizational outreach.

**Segmentation:** The practice of dividing a participant database into groups based on engagement level, geography, interests, or other relevant criteria, and tailoring communications and asks accordingly.

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