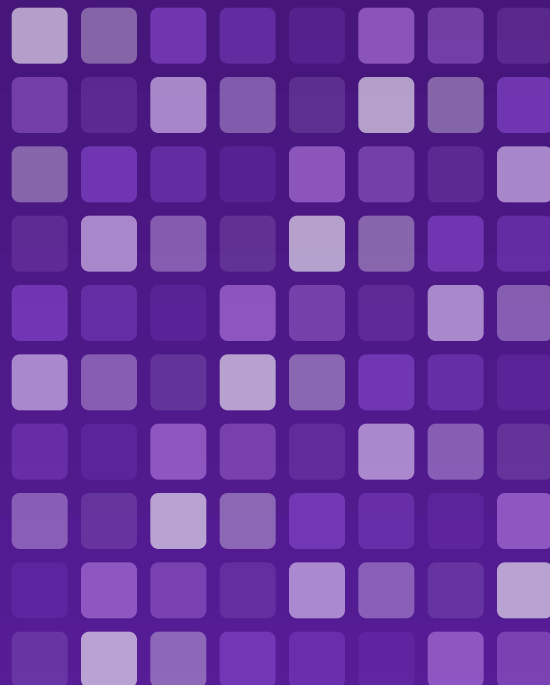


RESIST. REVOLT.

A FIELD GUIDE FOR ORGANIZERS & ADVOCATES

Data & Lists

Your list is your power. Every name is a person, every person is a relationship, and every relationship is a lever.



01 Your List Is Your Power

An organization that can't answer "who are our people, and what are they ready to do?" can't plan, can't turn out, and can't win. Good data is the organization's memory.

Data and list management means collecting, organizing, updating, and protecting information about your members, supporters, and contacts, so the right person gets the right ask at the right time.

What good data lets you do

- **Know your strength.** How many members, in which workplaces or buildings, at what level of commitment.
- **Turn people out.** Call, text, and email the right people for each action, and track who came.
- **Follow up.** No conversation, sign-up, or commitment falls through the cracks.
- **Develop leaders.** See who is moving up the ladder of engagement and who is ready for more.
- **Survive turnover.** When an organizer leaves, the relationships and history stay with the organization.
- **Prove your power.** Real numbers make credible threats to targets and strong reports to members.

Read through a class lens

Corporations and political machines harvest our data to sell to us and manipulate us. We collect data for the opposite reason: to connect working people to each other and coordinate collective action. That means collecting only what we need, protecting it fiercely, and never using it against the people who trusted us with it.

The organized side keeps records.

A RULE OF THUMB FOR CAMPAIGNERS

Bosses, landlords, and parties track everything. Our campaigns deserve the same discipline, used for our ends.

02 Choosing Your Tools

Start simple

- A shared spreadsheet is fine for a small group.
- One sheet, one row per person, clear column headers.
- Restrict editing and share with only the people who need it.
- Write down how the sheet works.

When to upgrade

- You have more than a few hundred contacts.
- Several organizers are entering data.
- You need to send texts or emails, track events, or take donations.
- You're losing track of follow-ups.

What to look for in a CRM

- Contact records with custom fields and tags.
- Event sign-up, email, and texting tools.
- Easy data entry from a phone.
- User permissions and two-factor login.
- Exports, so your data is never locked in.
- Movement pricing for nonprofits and unions.

Common options

Movement groups often use tools like Action Network, EveryAction, NationBuilder, Airtable, or a union or party's shared system. Compare current features and costs; pick what your team will actually use.

Who owns the data

- The organization, not an individual organizer.
- At least two trusted people hold admin access.
- Know where the data is stored and who the vendor shares it with.
- Read the vendor's privacy terms.

One source of truth

- Pick one main system and stick to it.
- Sync or import other lists into it regularly.
- Retire scattered personal spreadsheets and phone notes.

03 Core Fields: Your Data Dictionary

Agree on a short list of core fields and define each one, so every organizer enters data the same way. This is your data dictionary.

FIELD	WHY WE TRACK IT	EXAMPLE
First & last name	Basic identification	<i>Maria Lopez</i>
Phone (mobile)	Calls and texts	<i>602-555-0123</i>
Email	Email updates	<i>maria@example.org</i>
Address / unit or worksite	Turf, building or shop structure	<i>Bldg C, Apt 4</i>
Language	Reaching people in their language	<i>Spanish</i>
Source	Where they came from	<i>Door knock, 9/12</i>
Support level (1–5)	Who is with us	<i>2</i>
Ladder stage	How involved they are	<i>Attended meeting</i>
Tags / activist codes	Issues, skills, roles	<i>Rent strike; Spanish speaker</i>
Last contact & by whom	Follow-up and accountability	<i>10/2, J. Kim</i>
Next step & date	What's next for this person	<i>House meeting 10/9</i>
Consent: text / email	Legal and ethical permission	<i>Text: yes; Email: yes</i>

Don't collect what you don't need

Never record immigration status, health details, criminal history, or other sensitive information in your database. If it isn't needed to organize, leave it out. Data you don't have can't be leaked, hacked, or subpoenaed.

04 Tracking Engagement

Track commitment, not just contact. A list of 5,000 emails is not the same as 50 leaders who can each turn out 10 people.



LADDER OF ENGAGEMENT: RECORD EACH PERSON'S CURRENT RUNG

Support assessment (1–5)

Many organizers rate everyone they talk to after each conversation:

- **1** — Leader: actively organizing others
- **2** — Strong supporter: will act
- **3** — Undecided or unknown
- **4** — Leaning against
- **5** — Opposed

Rate on what people *do*, not just what they say.

Tags that pay off

- Issues they care about
- Skills: translation, design, driving, cooking
- Roles: steward, captain, spokesperson
- Events attended, with dates
- Workplace, building, or turf

Measure what matters

- Members and leaders by turf
- One-on-ones per organizer per week
- Commitments vs. actual turnout (flake rate)
- People moving up a rung each month
- Majority tests: what percent of a shop or building is a 1 or 2?

05 Data Hygiene Routine

Dirty data wastes volunteer hours and embarrasses the campaign. Keep it clean with simple, regular habits.

1

Enter it within 24 hours

Sign-in sheets, canvass results, and one-on-one notes go into the system within a day. Assign a person to do it after every event.

2

Use consistent formats

Follow the data dictionary: same phone format, same tag names, same spellings. Use drop-downs instead of free text where you can.

3

Search before you add

Always look someone up before creating a new record, to avoid duplicates.

4

Merge duplicates weekly

Run a duplicate check and merge records carefully, keeping the most recent information.

5

Update after every touch

Log each call, text, door knock, and event, with the result and the next step.

6

Honor opt-outs immediately

When someone says stop texting or unsubscribes, mark it right away and respect it everywhere.

7

Clean regularly

Monthly: fix bounced emails and wrong numbers. Quarterly: review inactive contacts and stale tags.

8

Review in meetings

Look at the numbers together every week. Data that leaders use is data that stays accurate.

06 Privacy & Security

People trust us with their names, numbers, and stories. Protecting that trust is part of protecting them.

Access

- Give each person only the access they need.
- Use individual logins, never shared passwords.
- Turn on two-factor authentication for every account.
- Remove access the day someone leaves the role.

Consent & the law

- Get clear permission before texting or emailing people, and record it.
- Include opt-out instructions in mass texts and emails.
- Texting and calling rules exist (in the U.S., under the TCPA and carrier rules). Use compliant tools and check current requirements.

Handling exports

- Avoid downloading full lists to personal devices.
- Share call lists only for the turf someone is working.
- Delete exported files and paper lists when the shift is done, or shred them.

Plan for the worst

- Keep a secure backup.
- Know who to call if a device is lost or an account is hacked.
- Have a plan for a breach: change passwords, notify affected people, learn from it.
- If your work faces legal risk, ask a lawyer what records to keep.

07 Data Plan Worksheet

OUR MAIN SYSTEM

ADMINS (AT LEAST 2)

ENTRY DEADLINE AFTER EVENTS

DATA LEAD

BACKUP LOCATION

WEEKLY CLEANUP OWNER

Monthly list growth tracker

MONTH	TOTAL	SUPPORTERS	ACTIVE	LEADERS	NEW	NOTES

NEXT IMPROVEMENT TO OUR DATA SYSTEM

Every name is a person. Every person is power.

Collect with care, keep it clean, protect it fiercely, and use it to bring people together.

RESIST. REVOLT.

Further reading

Jane McAlevey, *No Shortcuts: Organizing for Power in the New Gilded Age* (2016), on structure tests and majority campaigns.

Commons Social Change Library, guides on digital security and campaign tools. commonslibrary.org

Electronic Frontier Foundation, Surveillance Self-Defense. ssd.eff.org

Companion guides: *Relational Organizing*, *Collective Care*, and *Grassroots Fundraising* (Resist. Revolt.)