Community Division Organizer

Checklist for Success

(each step takes half an hour or less)

A. Preliminary

☐ **1** Print this checklist and post it somewhere you will see it every day. Put a checkmark in the box for this step. (Put a checkmark by each step as you go along.)

☐ **2** Watch the video on the Common Good Finance (CGF) website (commongoodbank.com).

☐ **3** Get excited about the idea of common good banks. Notice what excites you about it and write it down here very concisely and post it on the website homepage:

☐ **4** Join us in working towards a more democratic, just and sustainable future. Become an official common good bank Community Division Organizer by agreeing to the organizer contract.

B. Get set up

☐ **1** Create a Google/Gmail account. You will use this account for discussions with other organizers, for tracking hours and expenses, and more. We also recommend that you use your CGF email address (yourusername@commongoodbank.com) for all project-related communications. Gmail makes it easy to set this up. Go to gmail.com to create an account. (Your Google/Gmail username does not need to be the same as your organizer username.) Click on "Settings" in the upper right corner to set up a professional-looking signature, modeled on the Personnel Director's or President's email signature, then click the "Accounts" tab to set your "From" address to be your CGF email address. Tell the Personnel Director your Gmail address.

☐ **2** Send a digital photo to the Personnel Director and President. Your photo will appear by your name on the "Who Are We" page at commongoodbank.com.

☐ **3** Log in to your organizer web page (commongoodbank.com/organizers/username). Poke around. Your username is your first initial (and maybe middle) and last name.

☐ **4** While you're signed in, click on "Site Admin". Go to "Posts", then "Add New". Introduce yourself and your community; blog about your progress and plans.

☐ **5** Go to Google Documents (you can use the link near the upper right on your organizer web page) and open the spreadsheet that we created for you. Put in your hours and expenses so far, as of today (and mention that you have completed Step #B4!).

C. Get started

☐ **1** Watch the video again.

☐ **2** Read the FAQs on the website.

☐ **3** Look in the mirror and tell yourself, in one or two sentences (at most), what a common good bank is and why that's really really important.

☐ **4** Find a Depositor Sign Up Sheet in your welcome package. If your welcome package has not arrived yet, print one out (see the Promotional Materials section of your organizer web page).

☐ **5** Talk to one friend IN PERSON and tell them about common good banks. Tell your friend that you are working to get common good banks started, hand them your business card (if you have some yet) and ask them if they would like to sign up as a future depositor, with no cost or obligation. If Yes, have them sign up on the Sign Up Sheet. ***IMPORTANT:*** Put a check by this step whether or not they say Yes. You are responsible for making contacts, not for their reaction. You will get many "No"s as you do your work. Despair not. A "Yes" is exciting, but the *asking* is your victory.

D. Study a bit more

☐ **1** Listen to the first half of the 6/22 Organizer Orientation for a guided tour of your organizer web page and the website in general (see "Staff Conference Recordings" on your organizer web page). Note any questions you have.

☐ **2** Read more of the website, especially the "[DETAILS]" links about Common Good Mission and Hands-On Democracy on the "Overview" page. Note any questions you have.

☐ **3** Listen to the second half of the 6/22 Organizer Orientation for a guided tour of the Organizer's Manual. Note any questions you have.

☐ **4** Read the Organizer's Manual. Note any questions you have.

☐ **5** Look at our Staff Map (linked to on your organizer web page). Notice that you are part of a team of great people working all over the U. S. to make sustainable community-based democratic economics a reality for everyone.

☐ **6** Ask your questions in the Forum online. Call other organizers and ask them. If they don't know, email or call one of the top staff people and get the answers!

E. Plan

☐ **1** Fill out the "Worksheet for Organizing a Community Division" brainstorm (question #1). Put names in all 40 blanks. Remember the people who have already signed up – see the "List of Local Signups" on your organizer web page. Think about who you want on your local team (friends, neighbors, acquaintances, community leaders). Mark people who might help organize (question #2).

☐ **2** Mark business owners and write down at least one additional business that might be supportive (question #3).

☐ **3** Mark high net worth individuals and write down at least one additional qualified investor who might be supportive (question #4).

☐ **4** Write down at least one local nonprofit that might be supportive (question #5).

☐ **5** Make a list of local community groups (churches, clubs, etc.) that might be open to hearing a presentation on common good banks.

☐ **6** Scan the remainder of this checklist and make adjustments as you see fit. (If it looks fine as is, leave it alone. You can always make adjustments later.)

F. Build your team

☐☐☐ **1** Talk to someone on your worksheet that you marked as a possible organizer. Ask them to see the video and think about whether they want to sign up and whether they want to work with you on it, at least a couple hours a week or perhaps (if they have a nice house) host a house party. Set a time (within 48 hours) to talk about it.

☐☐☐ **2** Talk about it with that person, in person or by phone.

☐ **3** Optional: Most people feel very uncomfortable asking someone if they would like to donate. That makes the next step (F4) very hard. Do it anyway. If you have any trouble saying the 15 italic words comfortably, then first read Elaine Cornick's 6/14 "Fundraising From the Heart" workshop notes and/or listen to the audio recording (see "Staff Conference Recordings" on your organizer web page). Everyone wants to make a difference in the world – by offering someone a chance to support the project with their money, you give them an easy way to make a big difference.

☐☐☐ **4** ***IMPORTANT:*** If the person you are talking to (in step F2) is supportive – whether or not they want to work on it – say these words: *"Would you like to support the effort with a donation of, say, $50 or $100?"* (Different amounts, as appropriate. See the Organizer's Manual, page 10 for guidelines.)

☐ **5** Repeat those steps (F1 to F4) until you have at least one or two people who agree to help. Six would be great. Put another checkmark by those steps every time you repeat.

G. When someone says YES

- ☐ **1** Follow up. If possible, have them write a check to "S2BE" on the spot and hand it to you or mail it to you. Otherwise check your List of Local Signups (linked to from your organizer web page) one or two days later, to see if they donated online. If not, call to remind them to actually make the donation. They will probably be grateful for the reminder.
- ☐ **2** As soon as the donation has been made (even if it is an "in-kind" donation) write the donor a nice thank-you card and mail it to them.
- ☐ **3** Within two weeks, send the donation check to S2BE (PO Box 21, Ashfield, MA 01330).
- ☐ **4** Once you have raised at least one donation, you can get paid! Remember to email an invoice to S2BE, for up to 60% of the donations you have received to date. (If 60% does not cover all the time and money you have put in, include the shortfall on a later invoice.) See the Organizer's Manual, page 4, for an example invoice.
- ☐ **5** Think of the donor as part of your team. After a couple weeks, send them an update on how the project is going in your community.

H. Organize a public presentation and organizing meeting

- ☐ **1** Get someone to take a dynamic photo of you talking excitedly to your team or to a local business person. Close up is best. Minimize background distractions.
- ☐ **2** Set an organizing meeting place and time (for one week from now). Reserve the meeting place. Libraries often have a meeting room and audio/visual equipment that you can use free.
- ☐ **3** Find the example press release and poster (Follow the " Press Releases and Posters" link on your organizer web page). Edit the poster as needed (use your photo instead of the graphic). Copy the press release into an email and edit it as needed.
- ☐ **4** Print 30 posters and give them to your team to post all over town.
- ☐ **5** Send the press release (with the photo as an attachment) to local radio, newspapers, and local cable TV.
- ☐ **6** Within a few hours, call to follow up. Call every radio station, TV station and newspaper that you emailed. Make sure the newspapers got your press release and ask if they can use it. Ask the radio and TV for interviews.
- ☐ **7** Create an email invitation and send it to people you know. Ask your team members to send it to people they know.
- ☐ **8** Arrange to borrow, rent, or own: a laptop computer, a video project, a screen, external speakers, a grounded extension cord, a power strip with at least three outlets, a digital camera, a newsprint pad, markers and an easel.
- ☐ **9** Download the video onto a laptop computer.
- ☐ **10** Test the whole setup at least two days before the presentation.
- ☐ **11** Ask each member of your team to call ten people to invite them personally.
- ☐ **12** The day before the event, call the ten people you most want to see there and remind them about it. Make sure that your team members will be there. You will want some friendly faces in the crowd at your first few presentations.
- ☐ **13** Print out the FAQs from the website and bring it to the public event along with your "How Are They Different" crib sheet and a dozen copies of the planning worksheet.
- ☐ **14** Ask a reporter, a friend and/or one of your team members to take some dynamic photos of the meeting.

I. Hold the public event (even if only one person comes)

- ☐ **1** Greet people as they arrive. Introduce yourself and your team. Explain the agenda for the evening: 15 minutes to see the video, 45 minutes for discussion, 45 minutes for an organizing meeting. Be prepared to end on time!
- ☐ **2** Show the video.
- ☐ **3** Say very briefly again that you think this is a great idea and you signed up to work on getting one started in your area. Ask the crowd "Do we want to have a common good bank here in our area?" Invite the crowd to comment and pose questions. Mention that you're not an expert but can answer some questions and get answers to the rest. Have a team member write down all questions.
- ☐ **4** Five minutes before the end of the hour, announce that you will take one more question or comment before closing.
- ☐ **5** After the final question, invite people to stay for the organizing meeting (after a five minute break) and/or sign up as a future depositor with no cost or obligation. Pass out signup cards and ask them to fill it out and leave it with you before they go. (Don't let them take it home or you will never see it again!)
- ☐ **6** After the break, get people back together. Hand out the planning worksheets. Someone on your team take notes. Propose and post this agenda (be willing to adjust):
    - Work individually on worksheet questions #1 and #2 for 5 minutes
    - Brainstorm together on questions #3, 4 and 5, for 5 minutes each.
    - Discuss specific strategies for 10-15 minutes.
    - Decide who will do what. (5 minutes)
    - Set a next meeting date.
- ☐ **7** While everyone works on worksheet questions #1 and #2 individually, rest.
- ☐ **8** Brainstorm together on questions #3, 4 and 5, for 5 minutes each. Write the ideas down on newsprint. No commenting on the ideas during this activity! Be aware that some people present may qualify as business owners, accredited investors and/or representatives of nonprofits.
- ☐ **9** Discuss specific strategies for 10-15 minutes. Present this as a proposed course of action: hold house parties, speak to groups, ask individuals, nonprofits and businesses to sign up, then invite them to donate and invest. Sit back a bit while people talk about it and develop a somewhat different plan. Make a timeline for whatever they come up with.
- ☐ **10** Ask everyone to take on some task to accomplish in the next week (see list of possibilities in the Organizer's Manual: B3, page 6).
- ☐ **11** Set a regular meeting date/place and/or a way to check in with each other. Propose to meet weekly on the present weekday.

J. Follow up

- ☐ **1** Keep a record of who has agreed to do what; who is contacting which individuals, nonprofits and businesses, etc.
- ☐ **2** Write a new press release about the event, reporting on what happened.
- ☐ **3** Send it, along with a photo of the event, to your local newspapers, radio and TV.
- ☐ **4** Facebook and Twitter about it.
- ☐ **5** Check in with people after a few days (and regularly throughout your work on the project) to see how they are doing and whether they need help.
- ☐ **6** Also check in (regularly) with other division organizers. They are part of your team too. Review the "Collaboration and reporting" section in your Organizer's Manual, for a list of your specific responsibilities.

K. Get the word out

☐☐☐ **1** Keep your "How Are They Different" crib sheet handy whenever you are talking with someone about the project. It is a list of talking points. Put a checkmark here the first three times you remember to carry it with you.

☐☐☐ ☐☐☐ ☐☐☐ **2** Contact one of the remaining people listed under question #1 on your worksheet by phone or in person (or by email with a followup by phone or in person), just like in Section F, above. Put a checkmark here the first nine times.

☐ **3** Use the "Tell Someone About It" link on your organizer web page to tell everyone on your email list about the project, many at once.

☐ **4** Print 20 posters for Interns (see the "Press Releases and Posters" link on your organizer web page). Post them around town (or get a volunteer to do it).

☐☐☐ **5** Always carry your CGF business cards with you and hand one to everyone you meet. Say something like "You might be interested in this project I'm working on, to create a sustainable democratic economic system." Put a checkmark here the first three times.

☐ **6** Look up your area at greendrinks.org. If there is a Green Drinks networking event near you, attend one, talk about the project and invite people to sign up and/or help as interns, volunteers, or even paid organizers. (Paid organizers should take responsibility for a separate area, unless you are bringing in enough donations to support an additional paid organizer in your area).

☐ **7** Create a Facebook group, blog, and/or Twitter account to keep people in your area and friends elsewhere up to date about your progress. If you need help with this, ask your growing team for volunteer help.

☐ **8** Check in regularly with your local team and with other division organizers. For anyone that you do not see at your weekly meeting (including active nonprofit people and business owners), check in with them individually. Make this part of your weekly schedule.

L. Look for nonprofit partners

☐☐☐ **1** Pick one nonprofit organization from your worksheet list. Look at the organization's website. Read their mission statement and look for a list of staff members and board of directors. In particular, find out the name of the Executive Director. Ask your local librarian for help, if needed.

☐☐☐ **2** Think about what kinds of partnership would be best for that organization. (See the Partnership Agreement and section D, page 8 in your Organizer's Manual.)

☐☐☐ **3** Call the organization and ask for the Executive Director by name. If the E.D. is unavailable, leave a message that you called and call back the next day. And the next and the next.

☐☐☐ **4** Tell the E.D. about the project, with a focus on how it will help further the organizations mission. Ask to email a partnership proposal. Ask the E.D. to look at the proposal, see the video, think about whether the organization would like to work with us to help make it happen, and agree to talk again in two days.

☐☐☐ **5** Talk again. Offer to make a presentation to the board of directors, if necessary. If the organization will help, be clear about what it will do, specifically.

☐☐☐ **6** Ask if the organization would also contribute $100, $250 or $1,000 toward the project.

☐☐☐ **7** Follow up. Remind the nonprofit to write the check, to send out publicity about the project, to arrange a meeting with potential investors, or to follow through on whatever they agreed to do to help.

☐ **8** Repeat for other nonprofits. You only need one, under your contract, but nonprofits can be powerful allies in promoting the idea.

M. Look for business partners

☐☐☐ **1** Pick one business from your worksheet list. Find out who owns it.

☐☐☐ **2** Find out who you know, that knows the business owner. Ask them to introduce you.

3 Look again at the Partnership Agreement and section E, page 9 of the Organizer's Manual.

☐☐☐ **4** When you meet, tell them about the project, with a particular focus on benefits to locally-owned businesses (no fee local credit/debit card, advertising, keeping people shopping locally, investment in local businesses, low interest loans for energy saving improvements). Ask them to see the video and talk again in two days about possibly signing up to participate (with no obligation). If they don't have the technology to see the video, show it to them on a laptop or give them a brochure.

☐☐☐ **5** Talk again. Fill out the partnership agreement with them. Ask if they would also contribute $100, $250 or $1,000 toward the project.

☐☐☐ **6** Follow up. Remind the business owner to write the check, to send out publicity about the project, to arrange a meeting with other business owners, or to follow through on whatever they agreed to do to help.

☐ **7** Repeat for other businesses. You only need five, under your contract, but businesses can be powerful allies in promoting the idea.

☐ **8** Ask one of your business partners to arrange for you to speak to the local Chamber of Commerce or local business club.

N. Look for large donors and investors

☐☐☐ **1** Pick one high net worth individual or qualified nonprofit or business from your worksheet. If there is someone you know, start there and ask to meet to talk about this exciting idea that they may be interested in supporting or getting involved in. Otherwise start with someone that one of your team members knows and ask them to set up a meeting for the three of you.

☐☐☐ **2** Review Sections F and G, page 9 and "What NOT to Say or Do", page 11 in the Organizer's Manual.

☐☐☐ **3** Practice, with a friend, saying "so, would you like to invest fifty or a hundred thousand dollars in this project?" and "would you like to give five or ten thousand dollars to help make this happen?" without choking.

☐☐☐ **4** Meet. Ask what THEY are passionate about. Listen well. Talk about how common good banks can support what they care about. Have fun. Invite participation.

☐☐☐ **5** If they do not say Yes or No, follow up. Meet again.

☐☐☐ **6** People give to people. If someone makes a large donation, it is largely because they like you and trust your integrity and enthusiasm. If they weren't a friend of yours before, they are now. Be sure to send a thank you card and keep your friend up to date on how the project (which is now also their project) is going.

☐ **7** Repeat. Your contract suggests minimum amounts, but you may want to aim for more. There is no limit. ALL donations and investments will be put to good use.