Brigade Organizers Quick Links

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*CfA Brigade Requirements

CFA RESOURCES

Weekly Network Updates	http://c4a.me/thisweekincivictech
Meetup.com	https://brigade.codeforamerica.org/software/meetup
Slack Network	https://brigade.codeforamerica.org/software/slack
Civic Issue Finder	http://civicissues.codeforamerica.org/geeks/civicissues
Project Search	https://brigade.codeforamerica.org/projects
CfAPI	https://github.com/codeforamerica/cfapi
Free Software	https://brigade.codeforamerica.org/software/

KEY CONTACTS

CfA Brigade Team	brigade-info@codeforamerica.org

KEY REFERENCES

Digital Service Playbook   http://playbook.cio.gov
Who Benefits from Civic Tech?   http://research.mysociety.org/sites/who-benefits/

KEY RESEARCH
What's New in Civic Tech: A Look at How Mapping Data Makes It Useful
http://www.govtech.com/civic/Whats-New-in-Civic-Tech-05042017.html
Trends in Civic Tech (2013 Knight)
https://knightfoundation.org/features/civictech/
Civic Graph (Microsoft)
https://www.civicgraph.io/

Brigade Organizer's Playbook

Version Two

Updated December 15th, 2016

Introduction

Over the past four years, Code for America Brigades have learned a lot about how to build sustainable, civic hacking groups and bring 21st century government practices and products to their cities. Based on these lessons, we've compiled this playbook to help Brigade organizers get started.

This playbook is a work in progress. We will continue to update the content, design, and format. Please email us at brigade-info@codeforamerica.org with any questions or feedback.

Thank you to the United States Digital Service for playbook inspiration.

ORGANIZE

Host hack nights and days of action
Description
Hosting regular hack nights and days of action (CodeAcross, National Day of Civic Hacking, CityCamp) are primary activities for Brigades. These events provide consistent spaces for Brigade members and government and community partners to come together to conduct user research, build prototypes, and more.

Checklist: Identify day/times for hack nights or larger events
- ❏ Identify themes for hack night or events. Often hack nights are less theme-based but some Brigades do special activities once a month, such as hosting speakers or touring city departments
- ❏ Lock down a venue for your event
- ❏ Find sponsors for your event
- ❏ Create an online invite for your event
- ❏ Invite government and community partners to your hack nights and events
- ❏ Recruit Brigade members from a diverse range of places to your events and hack nights
- ❏ Get logistics in place for your event, such as food, AV, etc.

Key Questions
- What is our plan for recruiting and engaging a diverse group of people for our event?
- What is our plan for welcoming new people to our Brigade hack nights and events?
- How will our core team manage logistics for hack nights and events?
- How will the work continue from hack night to hack night OR after a big event?
- What research can be done to prepare attendees for the event?

Resources
- [How to run a civic hackathon](#) (Smart Chicago)
- [How to welcome new coders to a hackathon](#) (18F)
- [How to start a CityCamp](#) (CityCamp)
- [Sample Agenda](#) (Code for San Francisco Sample Agenda)
- [@CivicWhitaker Anthology: Three years of organizing, writing, and documenting in Chicago civic tech at the Smart Chicago Collaborative](#) (Smart Chicago)

Cultivate government partnerships
Description
Collaborating with government is the central tenet of Code for America's theory of change, so building strong relationships with government partners is key to building a strong Brigade. Government partners bring subject matter expertise to a Brigade, skills around outreach, public administration, and valuable experience solving the toughest problems in our cities. Brigades support local governments by working together on events and civic technology projects.

Checklist:
- ❏ Start small. Identify a few departments or government partners your Brigade would like to work with.
- ❏ Introduce yourself to these potential partners, or better yet, find someone who knows them to introduce you.
- ❏ Get to know one another. This might mean introducing potential government partners to the idea of civic hacking and concepts like user-centered design.
- ❏ [Host a workshop to help partners identify user needs](#) and determine where your Brigade could use technology to make an impact for government partners and/or the people they serve
- ❏ Invite government partners to hack nights
- ❏ Start with small wins - experiment with a small project
- ❏ Set up tours of government departments for your Brigade members to get a closer look at government in action

❏ Acknowledge good work

Key Questions
- Do we have a point of contact at the city that can help guide us through city government?
- How can we meet government partners where they are?
- What can we do to make it easy for government partners to collaborate with our Brigade?
- Is our space a learning environment where it's easy to collaborate?

Resources
- [What is Civic Tech?](#)
- [10 Ways to Collaborate with Government](#)
- [Collaborative Project Management](#) (Smart Chicago)
- [A User-Centered approach to food stamps (Video)](#)
- [Code for San Jose's Guide to collaborating with Government](#)

Cultivate community partnerships

Description

Community organizations are an important part of the equation when tackling the biggest problems in our cities. Community organizations include foundations, social service nonprofits, and educational institutions. These partners bring subject matter expertise to a Brigade, skills around outreach, service delivery, and valuable experience around solving the toughest problems in our cities. Brigades support local community partners by working together on events and civic technology projects.

Checklist
- ❏ Start small. Identify a few community partners your Brigade would like to work with.
- ❏ Introduce yourself to these potential partners, or better yet, find someone who knows them to introduce you.
- ❏ Get to know one another. Attend a community organization's events and invite them to yours.
- ❏ [Host a workshop to help partners identify user needs](#) and determine where your Brigade could use technology to make an impact for community partners and/or the people they serve.
- ❏ Start with small wins - experiment with a small project.
- ❏ Acknowledge good work.

Key Questions
- How can we meet community partners where they are?
- What can we do to make it easy for community partners to collaborate with our Brigade?
- Is our space a learning environment where it's easy to collaborate?

Resources
- [Q&A's lead to more Q&A's - and that's OK!](#) (Code for Boston)
- [Collaborative Project Management](#) (Smart Chicago)

BUILD

Host a workshop to help partners identify user needs
Description
One of the most common questions at hack nights is "what should we do?" By researching and understanding user needs with government and community partners, Brigade members can get a better idea about what projects to take on and how they should be shaped.

Code for Boston's User Needs Workshop Checklist
- ❏ Host a workshop for government and community partners. The goal of the workshop is to identify user needs that your Brigade can prototype at a hack night or upcoming event.
- ❏ At the workshop, kickoff by explaining civic hacking concepts that it will be useful for your partners to know. This might include hack nights/hackathons; prototyping and lean development; user research.
- ❏ Next, conduct an exercise where each person in the room writes down problems they are interested in solving for their organization or department. You can do this a few ways:
    - ❏ Use the prompt "how might we..." For example "How might we help youth in Codman Square to find jobs that they can get to without a car."
    - ❏ Use the prompt "As a ____, I want to ____, so that I can _____." For example, "As a parent, I want find out about public school enrollment so that I can get my child registered for kindergarten."
- ❏ Give the participants homework to A.) continue to refine their statement(s) for the hack night or event that they'll be attending B.) gather any data or research they think might be useful.

Key Questions
- Do we understand the problem set the user faces?

- Are we talking to real people that are facing the challenge? Are we in the trenches trying to help?
- As we start to identify needs, what are the project ideas that are feasible for our Brigade to take on?

Resources
- [GDS Design Principles](#) (UK Government Digital Service)
- [Experimental Modes in Civic Technology](#) (Smart Chicago)
- [Subject Matter Primers](#) (Smart Chicago)
- [Building User-Friendly Tools: Lessons Learned from the City of Asheville](#) (Video)

Practice lean software development
Description
There are a lot of resources out there about how to build software in a lean way. We won't reinvent the wheel but here are some parts of the lean process that are particularly relevant to building Brigade projects.

Checklist
- ❏ Organize up front. Getting the right partners and members involved at the beginning of a project allows you to develop in a lean way and makes it easier to iterate faster
- ❏ Experiment and have fun
- ❏ Make the project accessible for others who want to help, have a clear README
- ❏ Break down project into the smallest parts. Short cycles and deliverables are motivating for volunteers and also make it easier to bring new people in.
- ❏ Design, build, test, repeat.
- ❏ ID metrics to measure project impact

Key Questions
- What is the user need?
- How can we break this project into small enough pieces so we'll always be shipping?
- How can our Brigade help non-technical members and partners understand lean software development? What infrastructure do we need to build around this (i.e. monthly Lean 101 Workshop)?

Resources
- [Minimum Viable Civic Tech Projects (Video)](#)
- [The Big Thing about Small Things (Video)](#)

Conduct user testing

Description

User testing is vital to ensuring that your project both works and actually solves the problem it's trying to address.

Cyd Harrell's Usability Checklist
- ❏ Grab a human
- ❏ Set up to see their screen and hear them talk
- ❏ Ask what they need from your (process, website, app)
- ❏ Have them actually try it and narrate for you
- ❏ Zip your lip and take notes

Key Questions
- ● What infrastructure can our Brigade setup to ensure we are always testing our projects? (i.e. CUTGroup)
- ● Does our project work like we designed it?
- ● Does our project solve the problem?
- ● Are there ways that we can improve the project to make it better suit user needs?

Resources
- ● [User Research 101 Skillshare](#) (Cyd Harrell)
- ● [CUTgroup Book](#) (Smart Chicago)

INFRASTRUCTURE

Implement a Code of Conduct

Description

An enforceable Code of Conduct is important in ensuring that your Brigade's activities, events, and digital forums provide safe environments that allow for participation from a diverse set of people. The proper implementation of the Code of Conduct is required to become an Official Brigade or receive any resources from Code for America.

Checklist
- ❏ Adopt the [Code for America Code of Conduct](#) or fork it and create your own
- ❏ Designate points of contact for concerns about breaches of the Code of Conduct
- ❏ Publish the Code of Conduct on your website
- ❏ Socialize the Code of Conduct regularly on your digital forums and at your events

Key Questions

- Who can Brigade members turn to if they have an issue?
- What is our strategy for enforcing the Code of Conduct?
- What is our strategy if someone contacts us with concerns?
- How will we address individuals who do not respect the Code of Conduct?

Resources
- [Code for America's Code of Conduct on GitHub](#)
- [Ashe Dryden's Code of Conduct 101](#)
- For Code of Conduct concerns at any Code for America event, please email safespace@codeforamerica.org

Build a core team
Description

Brigades with a diverse team of leaders are more sustainable and more effective than groups with just one leader. Because of this, it's important to develop a core team early. By working collaboratively, the core team can manage your Brigade as it grows and takes on more projects and activities.

Checklist
- ❏ Identify what core roles you think are needed for your Brigade to be successful. For an Official Brigade, Code for America recommends a Brigade have a Captain, Delivery Lead, Community Organizer and Storyteller
- ❏ Recruit people to fill your core team roles
- ❏ Meet regularly
- ❏ Communicate consistently

Key Questions
- Is our core team representative of our city?
- Does our team have a variety of skillsets?
- How will our core team make decisions?
- What methods of collaboration work well for us?

Resources
- [Roles within a Brigade](#)
- [Suggestions for additional Core Team members](#)

Draft a strategic plan
Description

A strategic plan will help your Brigade identify what you want to do in the next year. Use this as an opportunity to collectively decide what your Brigade will focus on and how you will get there.

Checklist
- ❏ Invite your core team (and government and community partners, if appropriate) to a planning meeting
- ❏ Think about what you want to accomplish in the next year (small wins are ok!)
- ❏ Document your vision
- ❏ Articulate your tactics (the more specific the better!)
- ❏ Submit your strategic plan to Code for America
- ❏ Schedule time to revisit your strategic plan throughout the year

Key Questions
- ● What does our Brigade want to accomplish this year?
- ● What partners would we like to work with in 2018?
- ● What strategies and tactics will our Brigade use to meet our goals?
- ● What outcomes do we envision for the end of 2018? Why is it worth it for our core team and the Brigade volunteers to do this work?

Resources
- ● [2016 Strategic Plan Template](#)

Fundraise
Description

In order build sustainable Brigade chapters, groups should develop local partnerships to fundraise for food for hack nights and other costs associated with running regular Brigade meetings. Here are a few key strategies to help you fundraise for your Brigade.

Checklist
- ❏ Designate fundraising lead(s)
- ❏ Understand the donor ecosystem in your community including individual, institutional, and corporate donors
- ❏ Develop a fundraising strategy. Set S.M.A.R.T fundraising goals: specific, measurable, attainable, relevant and timely
- ❏ Set up a database or CRM to track prospects and donors. This could be as simple as a spreadsheet in Google docs
- ❏ Identify fundraising prospects

❏ Execute on your strategy through the donor cultivation cycle: qualification, cultivation, solicitation, stewardship

Key Questions
- What is our budget for the year? How much money is needed to balance our budget and promote growth?
- Who are all the individual, institutional and corporate donors in our area and networks that would be interested in funding our work?
- What narratives from our work would be compelling for these donors?

Resources
- Brigade Fundraising Handbook
- 2016 Strategic Plan Template
- Expense Reimbursement Process (Brigade Handbook)
- Getting Sponsors for Your Event (Smart Chicago)

Set up tools to manage your Brigade

Description

Your Brigade will need tools to communicate with one another and build projects. A tool is only useful, however, if people use it. Select and implement the tools your Brigade needs to do its work and add others as needed.

Checklist
- ❏ Set up a Meetup account for your Brigade.
- ❏ Set up a free Github organization account for your Brigade.
- ❏ Set up a Brigade website. The most popular templates are Code for San Francisco and Code for Philly.
- ❏ Add your Brigade to the Code for America API.
- ❏ Choose a project management tool for your core team to use. Brigades use a mix of Waffle.io, Trello, Github Issues, etc. Don't spend much time debating what to use, just choose one and go.
- ❏ If needed, choose a forum tool for your Brigade to share resources and have online discussions. Brigades use Discourse, Google Groups, Meetup, and GitHub Issues.
- ❏ If needed, choose a tool for your Brigade to chat with one another. Most Brigades use Slack.

Key Questions
- What tools does our Brigade need to get its work done?
- How will we socialize these tools across our Brigade?

- How will we onboard new members to these tools?

Resources
- [Brigade Software](#)

Develop a brand and media strategy
Description

Humanizing the theory behind your work and sharing a captivating narrative will help people understand what your Brigade does. Consistency in branding will help unify all the Brigades and clearly articulate the power of our interconnected network.

Checklist
- ❏ What is the character of your group and its relationship to your city?
- ❏ Choose a couple events or projects you want to share. Decide why these represent your Brigade well
- ❏ Use the Brigade logos, templates, fonts, and colors

Key Questions
- What is the story we'd like to tell about our Brigade?
- What is our strategy for letting the community know about our work?
- Do we have an ask at the end of each story?

Resources
- **Brand**
  - [Code for America Brigade Branding Guidelines](#)
- **Media**
  - [Brigade Media Tips](#)
  - [Brigade tips for interacting with the Press](#) (Slide Deck)
  - [How to Blog](#) (Smart Chicago)
  - [Using Twitter to boost your event](#) (Smart Chicago)

Have a play you want us to add? Email us at brigade-info@codeforamerica.org.