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## Digital Organizing: Pivoting, Learning, and Adapting

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### Abstract

During the Covid-19 pandemic, most institution-based community organizations in the US moved to digital tools for their primary organizing work. The pandemic exacerbated inequality, making the work of these organizations even more urgent. Our specific focus for this paper is to look at one network of institution-based community organizations in the U.S. to examine the learning and adapting to digital organizing that was required of leaders and organizers during the pandemic. The Covid-19 crisis offered challenges to traditional face-to-face organizing methods. Drawing from our interviews, we invoke the notion of *pivoting* to explore the shift in organizing practice. We relate it to the common practice of organizing, disorganizing, and reorganizing and explore their use in the context of the pandemic (Gecan 2003; Han, McKenna, and Oyakawa 2021). We show *how* leaders adapted traditional organizing tools to the use of digital organizing during the pandemic, and some ways that these tools might continue to be used.

**Keywords:** digital organizing, digital tools, relational organizing

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## Introduction

The Covid-19 pandemic deepened inequalities and provided many challenges to community organizations that work to improve conditions for people in their communities and, for institution-based community organizing groups, member institutions. These organizations emphasize the important role of face-to-face relationships in their work, especially through traditional tools of organizing such as individual meetings, house meetings, and in-person intensive leadership training institutes. Building a relational culture, which these organizations see as key to their work, is traditionally done through intense in-person meetings. The public health provisions of the pandemic challenged these organizations' ability to do their work. Despite these challenges, many institution-based community organizations continued or even intensified their work primarily through digital forms of organizing. How did these organizations continue to build power and make change despite the challenges of the pandemic? What role did the use of digital tools and techniques play in this work?

In this paper, part of a larger study, we focus on the organizing strategies used by these organizations during the pandemic, especially the ways that they adapted traditional face-to-face organizing methods with the use of digital tools. Although our study focuses on institution-based organizations, we believe that the findings may also be applicable to other forms of organizing that focus on building relationships among participants and on developing leaders. We focus on the following questions: How did the leaders and organizers learn how to use digital tools during the pandemic? What changes did they make to traditional organizing methods, such as relational meetings and public actions, with digital organizing tools, and how might they continue to use these tools? What challenges did the organizations experience with the use of digital organizing tools? What are the larger implications for community organizing?

## Background

Scholars have studied how non-profit organizations use digital tools and social media to engage in many kinds of policy advocacy work (Hall 2022; Johansson and Scaramuzzino 2019). Digital advocacy encapsulates a range of tools, including email, official websites, online resource sharing, video conferencing tools like Zoom and Google Meet, social media outreach, and other online tools. But organizations using digital tools may or may not be engaged in what scholars and practitioners refer to as organizing; they might be mobilizing (Han 2014) or engaging in policy advocacy in ways that does not involve building power by organizing people who are directly affected by the policy. A key difference between organizing and mobilizing is that organizing involves developing leaders, through ongoing leadership training in local, regional, and national organization networks, whereas mobilizing tends to take people's preferences as they are and seeks to provide ways for those preferences to be expressed collectively (Han 2014). Organizing involves leaders developing deep and ongoing relationships with one another within and across their institutions and building power through those relationships. Most of that relationship building has traditionally been done through in person meetings (Gecan 2003). We are interested in how organizations that see their work as organizing used digital tools, especially how they learned to use those tools, how they adapted their organizing work with digital tools, and how they pivoted to conduct their issue campaigns during the pandemic.

We thus use the term "digital organizing" to represent how the tools, techniques, and strategies of traditional institution-based organizing were adapted during the pandemic for use on digital

platforms. We want to show *how* these organizations used digital tools during the Covid-19 pandemic, how leaders view the use of digital tools, and how these uses might inform both the theory and the practice of organizing. The digital technologies and web-enabled networked communication used by these organizations are participatory rather than strictly focused on the delivery or consumption of information, making them much more useful for organizing purposes (Watwood, Nugent, and Deihl, 2009; Hick and McNutt, 2002).

Most of these organizations may have been using some digital tools prior to the pandemic, but most of their work would have been conducted in person. Most of our respondents spoke about the use of digital tools as a process of being “forced” to adapt to digital platforms to continue the work. Some leaders were quite reluctant to adopt these platforms. The urgency of the issues facing their communities meant that they needed to learn, adapt, and pivot to digital tools. Most organizations launched new listening or outreach efforts to learn what was happening with their members, and adapted existing issue campaigns or developed new campaigns due to the changed circumstances.

Many of our respondents used the term “pivot” to describe the ways that the work of their organization changed. This was a term that was widely used in the U.S. to describe the sudden shift at the beginning of the pandemic.<sup>1</sup> The leaders we interviewed referred to two types of changes with this term: the shift in issue campaigns, and the shift to the use of digital tools. In this paper we will primarily discuss the pivot to digital tools.

We see the use of the term “pivot” by leaders as related to a characteristic practice of these kinds of institution-based community organizing groups, that of disorganizing and reorganizing (Han, McKenna, and Oyakawa 2021; Han 2014; Gecan 2003). The organizations teach that building power requires imagination, the ability to compromise, and flexibility in strategy, especially when what you are doing is not working. “Disorganizing” is required when the organizations need to develop new approaches because an existing approach has been tried and is not working. A common practice is for the organizations to adapt their methods and strategies during an issue campaign to achieve their goals; decisions to do this would be made by leaders in consultation with one another as an issue campaign develops and sometimes, stalls. We believe that this organizational practice, familiar to experienced leaders and organizers who have had to adapt their strategies to changed circumstances, helped the leaders to respond to the challenges of the pandemic by learning new ways of connecting, adapting familiar organizing tools to digital platforms, and pivoting the focus of their issue campaigns to continue their work. The pandemic “disorganized” the way that these organizations did their work, as well as the issues that they were working on. The organizations that we studied engaged in “reorganizing” to be able to respond to these changed circumstances. The findings discussed here show how they used digital tools to reorganize. As we discuss our findings below, we focus on this “pivot” in terms of learning, adapting, and the challenges leaders faced in doing so.

## Methods

To answer these questions, we studied one nationwide network of community organizations in the U.S that has about 70 active local and regional member organizations. The network is composed of local and regional institution-based organizations, meaning that membership is by institutions, not

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<sup>1</sup> We thank an anonymous reviewer for pointing this out.

individuals. Most of the member institutions are religious congregations, though some are also nonprofits, unions, or other community organizations.

We collected public data and information about each organization in 2020 and 2021 and conducted semi-structured qualitative interviews in 2021 with sixteen leaders and one organizer from the organizations in the network that were most active during the pandemic. Through the publicly available information that we had collected, we identified the fifteen organizations that remained the most active in their organizing work during the pandemic. We then reached out to organizers to identify key leaders from each of those organizations. In one case, the organizer chose to be interviewed; in other cases, the organizers identified leaders who were key to the organization's work during the pandemic.

In some cases, we contacted leaders directly based on publicly available information from our data. We interviewed leaders from eleven organizations, located in the east, west, and midwestern U.S. Although the race, gender, and age of the leaders had no bearing in our selection criteria, of the seventeen leaders that we interviewed, i) ten were white, one was Latinx, and six were African American, ii) Four were men and thirteen were women, and iii) while we did not collect information about age, most of our participants were in their fifties or older. We used a standard interview protocol approved by our institution's IRB. To protect the privacy of our participants and the chosen network, we have used pseudonyms for all the leaders, their organizations, and other people mentioned during the interviews. We also refrained from mentioning specific areas where these organizations and people are located.

## Findings

### Learning

#### 1. Staying Connected

Part of what the organizations that we studied did at the very beginning of the pandemic was to help their member institutions think about how to stay afloat. This required finding ways to stay connected with people within and across member institutions. This struggle to stay connected and active within their community was a shared experience among all the organizations we interviewed. Esther noted that in the early meetings with key leaders, the organization was trying to "help them think initially about how they were going to keep their institutions together." This was crucial to the organizing work, she noted, since the organizations are institutionally based, and if their member institutions were not able to function, then the organization could not function.

*"One of the key emphases right at the beginning was the health of those institutions, and their ability to continue to connect with their...folks. In fact, pretty much the first eight weeks was [a] conversation amongst all of us about how we were staying in touch with our people, with our folks, and what we were hearing and what we were understanding about what they were experiencing." (Esther)*

While some leaders reported that some member institutions were already familiar with resources such as digital meeting software, such as Zoom, Google Meet, or Microsoft Teams, most leaders spoke of the process of learning how to stay in touch as a process of learning how to use these tools. While a few respondents had used digital meeting software for other purposes before the

pandemic, none of our respondents had used them in their organizing work. In these cases, the organizations played a vital role in helping leaders and member institutions learn.

## 2. Figuring out technology

*"And so we had to teach and adapt and pivoted online, everything was kind of pivoted online..." (Susan)*

*A lot of people did not even have an email address and didn't know how to use zoom. So [an organizer]...started reaching out and having training sessions and educating us all on zoom. So once we got that in place and started holding meetings, I felt, okay, we're coming back. We can address these issues. And there's even more issues to address during this time. So it's important for us to keep meeting. (Patricia)*

While digital platforms played a crucial role in maintaining connections, learning how to use the platforms proved to be a challenging process for many. Patricia recounts the initial difficulties faced by their members and leaders who were not familiar with Zoom. It took some time to set up the necessary technology and software and to learn how to use it.

For most of our leaders using technology was not a natural skill. Some of our respondents noted the generational differences in comfort with technology, and the need to help older leaders learn how to use different platforms. Bringing technology into their organizing work was a learning curve and required time, training, and a network of people who facilitated it during the COVID-19 crisis.

One challenge to staying connected was the question of whether member institutions, mostly religious congregations, even had information about their congregation members to enable them to contact members through digital tools. Esther put the issue this way:

*"I never considered the fact that, you know, you almost might need to do a technology check with everybody in your congregation to see whether you could maintain a pastoral connection with them." (Esther)*

The transition to digital environments proved challenging, and it took some work to help leaders and member institutions make this transition.

As Gwendolyn puts it, "everybody had to learn through this situation." Digital organizing required learning to work with technology, including new devices, software, and interfaces. Esther shares her experience of working with technology, "...all of those things are not second nature to me." Beverly recalls that her eldest congregant at the time was 94, and he had to order a webcam and learn how to get on the meetings online during the pandemic. Our leaders across the board also recall individual as well as team learning and training sessions and for some organizations, building a dedicated technical team. Susan recalls, "...during the pandemic, I've had to learn how to do PowerPoint XL. I didn't even have a Facebook page or an email account. And so I've had to learn how to do a lot of that..."

Many organizations relied on volunteers from their member institutions who knew or learned how to take charge of the technology. Esther's organization had a younger cohort of clergy leaders who were already familiar with technical and digital tools and brought them to the organization. Leaders across the country also shared experiences of navigating the technology and digital platforms with the help of family, friends and their neighbors. Patricia recalls how older members in her

organization relied on their children and grandchildren to help them navigate technology. She shares,

*"...that was a little bit of a challenge, especially with people that just were not familiar with it at all, a lot of them had to get their children or their grandchildren to help them even get on to the computer. So that was at the beginning, a little bit of an issue. People kind of...resist that a little bit, but now for all adapted..."*

This pivoting to technology and digital platforms was a long learning curve for most leaders and required "figuring out" as Katherine recalls,

*"...So initially I remember the first...strategy team meeting we had over Zoom, I scheduled an hour and a half meeting before that to make sure everybody could get on. And it took a whole hour and a half for me to get everybody on. But, then it was like figuring out, like, how do we do assemblies? How do we keep people engaged?"*

However, once the leaders and organizers learned the technical side of digital organizing, they leaned more toward it and started using it more effectively and creatively. Zoom, in particular, became a more integral part of their organizing work in a way it was not before the pandemic. Katherine, for example, shared how they started doing more breakout rooms once they figured out how to pair people for one-to-one relational meetings. They also used digital tools to do outreach and publicity in a new way, by having some of their leaders record videos on the importance of voting and election campaigns as part of an issue campaign and posted this online. According to Katherine, these are the things her organization normally would not have done due to their capacity and emphasis on face-to-face outreach. However, the digital tools allowed such creative forms of communicating. Teaching, adapting, and pivoting both at individual and organizational levels was an integral part of this process. On bridging the gaps of technology in community organizing work, Michelle asserts and reminds us that "technology is here to stay. It is here to stay, and we have to use it."

### 3. Technology, inclusion, and exclusion

We were interested in how the use of technology affected who was involved with the organization. We asked leaders if they saw differences in who was engaged with the organization during the pandemic both whether they saw new members, and whether they were able to stay connected with their existing members and institutions. Organizations reported a variety of different experiences. For some organizations, the issues raised by the pandemic helped them to engage more with different groups and they were able to bring in new members, in part through digital technologies. On the other hand, at least one leader told us that some of their member institutions, which had been losing membership even before the pandemic, ended up never reopening. Further, most leaders spoke of issue campaigns that required that they work in person, either because of the nature of the work such as food distribution or vaccination campaigns, or because they needed to reach people who did not have internet access.

Nonetheless, with digital tools, many organizations had a tremendous opportunity to connect with different people, and that connection strengthened the various relationships with different people and groups in their communities and, in some cases, across the state. Some of our respondents told us that statewide organizing became more possible because of the way digital meetings made it

easier, with no commute time. One way that digital organizing broadened the reach of the organizations was the accessibility provided by digital tools.

Digital tools made their meetings more accessible for the elderly, non-drivers, parents, people with demanding jobs, and people with disabilities. Beverly recalls how digital meetings increased overall representation from the community. Like Beverly, Gwendolyn also notes that *"...people didn't have to drive an hour away or two hours from wherever they were coming from, they could just simply log on to a digital opportunity that was directly at their home..."* Being involved in organizing work could work around their schedule more or less because people didn't have to get in their car and drive for hours to get to a meeting. According to Gwendolyn, *"...it gave people an opportunity to keep moving, keep their lives going, but still being engaged in the things that are going on around them..."* In addition, leaders mentioned other people with increased access. Beverly notes, *"...people that aren't able to easily drive at night. So many meetings happen at night, right. You know, this is an equalizer, you know, if you have, if you have internet, it doesn't cost any gas to get to the computer..."* Additionally, being able to use closed captioning on Zoom, as well as translation rooms, was an additional factor mentioned by some leaders as providing greater access.

Leaders also spoke of some of the exclusions of digital tools. Disparity in internet access and technology was a significant issue among many communities we studied to an extent where many organizations had to run separate campaigns for internet and technology access. There were families who did not have internet and/or did not have internet-capable devices. Some organizations' advocacy included advocating for schools to provide families with devices and internet access for their children to be able to attend digital school. There were also groups who did not have any access at all, including people who simply could not afford devices or internet access, and leaders related how they advocated for public officials to provide telephone helplines to access services such as rental assistance. Susan recalls,

*"I think that people got left out because not everybody has a computer or not everybody has internet or, I think that a lot of people think that that's a small percentage of people, but you're wrong. I mean, a lot of people don't have the funds to spend on that, especially during a pandemic. So I think that people did get excluded..."*

Leaders also mentioned using flyers and other offline methods to communicate with members who were unable to get information any other way. Many leaders described digital organizing as a barrier for some while it opened more access to others. As Susan rightly reminds us that *"...there's always cracks, and people fall through"*, and similar cracks also exist for in-person organizing that exclude people who do not have access to transportation or are not physically able to go out. Thus technology, particularly during the pandemic, turned out to be a boon for some and a barrier for others.

## **Adapting**

### **1. Pivoting from traditional to digital tools and methods**

The organizations that we studied gave a good deal of thought to *how* to use digital tools in their organizing, and we outline below how leaders described their strategies for adapting traditional organizing tools to make them work in digital spaces. These leaders described digital organizing as akin to adding a new, necessary tool.

Ruth, Charles, and other leaders emphasized that digital tools were not organizing, but rather a tool for organizing. Our respondents were very thoughtful as they described how they adapted their traditional organizing practices to make them work with digital tools.

Leaders told us that they used digital meeting software for almost all their meetings in the early stages of the pandemic. These meetings came about in several ways, sometimes facilitated by member institutions that had moved to the use of virtual meetings, while some organizations had already occasionally used virtual meeting software for some types of meetings. Most of our leaders also noted that they were reluctant to transition to digital tools, and many were surprised at how well they worked.

Charles noted that his organization was already engaged in a listening campaign in the spring of 2020, with house meetings and individual meetings, but when the pandemic began they shifted to trying to learn what people were experiencing, and this helped to shape the working groups that the organization formed to respond to the pandemic:

*So the first feedback we got from our folks was the huge concern about evictions and inability to pay rent. And so we had a working group...interfacing with the city and the county, to try to develop an appropriate response to get rental assistance to people. The second group was kind of a long-standing group, but got more ratcheted up, to do work around workforce development.*

For all of these meetings in the early days and in the ongoing work during the pandemic, the leaders we interviewed mentioned using Zoom for their regular meetings of leadership teams, or issue-based teams or working groups, for religious services, and for meetings with public officials. Some leaders also mentioned other digital meeting platforms such as Webex, but mainly in the context of how Zoom was the primary platform. As one leader put it, "So it was Zoom, Zoom, Zoom, Zoom, all the time." We detail some of these uses in what follows.

## 2. Small group and individual relational meetings

*"...He and I have been friends for years and years and years. And I just never, for whatever reason, thought that I could engage him with the work of [our organization]...But, I had a one-on-one with him the other day and he was sharing about homelessness and the entire story that he and his community had with this homeless person, and the fact that he felt so angry that there were no services for this woman. And, he was being very vulnerable with me and we never got to that place in person. And we've known each other for a long time..."*

This newfound, deeper relationship with an existing friend was a result of conducting one-on-one meetings on Zoom for Thomas. One on one or relational meetings are a crucial tool for this network of community organizations, and traditionally these meetings are conducted in person, face to face, with the goal of building strong relationships among leaders and finding new talent. Before the pandemic, suggesting that these meetings be conducted via Zoom would have been seen as inappropriate and counterproductive.

However, Thomas' experience of finding virtual individual meetings productive and meaningful was shared by many leaders in the network who were able to "see things in a new light" because of the opportunity to connect more frequently with digital tools. Leaders noted that the digital version of



these meetings worked pretty well, and some respondents expressed surprise about this. Many leaders noted that, especially during the early stages of the pandemic, people showed up more due to the social isolation and changed circumstances. They were able to check-in with each other in a meaningful way and really connect on an individual level. Relational meetings are of course the lifeblood of organizing, reaching out to people within the organization or new people who came to public meetings or were new to the organization. To continue this practice which leaders see as key to the organizational work, Zoom was an essential tool during the pandemic.

This was also true for small group meetings, or what are traditionally known as house or issue meetings. Hazel's organization conducted a successful city-wide food drive and it was easier to schedule meetings on Zoom with the delivery drivers. It was a "perfect" tool and "made their life easier" for Hazel and her drivers since they were all "scattered" and lived away from each other. For Hazel, the goal was to hold three of these weekly meetings, and doing this digitally made it more possible to reach this goal.

Other leaders conducted house meetings in conjunction with larger meetings, and breaking people into smaller groups either for one-on-one or small group meetings was an essential part of this practice when meetings were face to face. Breakout rooms were a way that this practice continued in digital meetings.

Our respondents were clear in stating that the experience of adapting these meetings to virtual spaces, while necessary and often profound, was different than meeting in person. Leaders related experiences both of getting to know people better in a digital meeting as well as the limits of digital meetings in terms of "something a bit ineffable... that's hard to pin down" (Naomi) that one experiences in face-to-face meetings.

Although digital meeting software did work well during the pandemic, several of our respondents spoke specifically about different aspects of organizing that are more effective in person. Esther described the "vaccine walks" that her organization had done as evidence of the importance of being physically present in neighborhoods to really know what was happening. Similarly, Katherine's organization had done nonpartisan in-person canvassing during the election to help people know how the mechanics of the 2020 election would work, and as she noted "the level of anxiety was just unbelievable and people really needed to see a person in front of them that they could figure out then like, can I trust this person?" Several leaders also spoke about the importance of face-to-face relationships for building trust between key leaders. Thus, as Beverly noted, "I think the best world is when you have access to both".

Katherine notes that, because of leaders' clear desire to connect with one another, her organization added a specific time period in advance of regular strategy team meetings: "...People were just like, just going on and on like relating to each other. Like they hadn't talked to anybody for a really long time, so we're like, okay, we're going to open early for socializing..." She shares. So they opened up the digital meeting 45 minutes early, so that people could catch up with each other and relate prior to conducting the business meeting.

Similarly, Darren recalls that in digital meetings, different leaders had come forward or become more outspoken on particular issues such as criminal justice, partly because of the different kinds of engagement that digital tools made possible such as the chat feature in Zoom, which seemed to bring out different voices. As he puts it,

*"So it was a way to kind of pull people in, be it through chat, be it through direct message that sometimes you can hear voices that you could not have heard in a room full of people. So that's been one of the beauties of pivoting to these spaces."*

Thus, our leaders found that digital relational and small group meetings were possible and necessary during the pandemic, while they also noted that relating to people in digital meeting spaces is different than what happens in person. Thus, when asked whether they would continue to use virtual meeting software for these types of meetings after the pandemic, most leaders felt that these meetings would more likely be in person, with occasional use of virtual tools for the sake of convenience.

### 3. Public action meetings

A "public action" usually involves one or more public officials responding to a specific issue the organization is working on in a public meeting; some organizations call these accountability sessions. Before the pandemic, these meetings would have been held in one of the member institutions or in a large public space. The organization will frame the issue, usually with one or more leaders telling a personal story about how the issue has affected their family and/or community. Then the public official is asked to respond by committing to a policy that will help address the issue. These public actions are sometimes described by organizers as a kind of public theater, with the goal of getting public officials to make commitments on the record to which they can then be held accountable.

Most of the organizations we interviewed conducted a "public action" meeting digitally during the pandemic. Nine of our leaders spoke about these types of public meetings specifically when we asked them about the organization's use of digital tools. Leaders spoke in detail about planning these actions with digital tools and their internal discussions of whether these meetings would even work in a digital setting, and how to make them as effective as possible. Naomi shares her organization's experience of putting together, in 2020, a fully online public action, and then a hybrid action in 2021 and live-streaming it with a Zoom audience. She recalls,

*"...we had a big technology team to make that happen. We were lucky that many of our institutions let us borrow some of their staff who help run hybrid events for their churches, synagogues, or schools. So without that team, it would've been much more difficult, but I think the pandemic has certainly required us to do some extreme pivoting and to really think about what it means to do the work of building power."*

For the hybrid action, they had a group of 40 leaders physically present at the venue, and they simultaneously arranged for Zoom participation of the other leaders and live-streamed the meeting. She describes such technology-based public action as "atypical." She recalls,

*"...we knew with the dynamics of the virus and with the pandemic that we could not wait two years to have a large in-person action, we needed to get some...movement around specific issues".*

Like Naomi's, several other organizations held digital statewide public actions with state public officials, primarily focusing on implementing pandemic relief benefits. Some organizations had held digital public actions with candidates in local elections. Leaders felt these actions had been successful, although several also said that they felt that something is lost when everyone is not in

the room together. As Darren put it when we asked how his organization might use digital tools after the pandemic, "...our actions, those will be definitely back in person when it's safe to do so, because so much of the energy around those can only happen when we're in a shared space." Leaders saw the in-person nature of public actions as more effective, even as they felt their virtual or hybrid actions had served their purposes during the pandemic.

One organization held its public launch via a digital public action during the pandemic. A public launch usually occurs after several years of organizing and relationship building; this organization had planned a launch for the spring of 2020, and out of necessity moved this to a digital launch. This organization had about seven hundred people present on their digital launch. The organization was also part of a new statewide network of local organizations. According to Beverly, the statewide organization launch, which occurred in the summer of 2020 and involved several state public officials, had more than two thousand people in digital attendance. Thus, despite the limitations of digital public actions, leaders felt that they were a useful tool given the circumstances.

#### 4. Training Sessions

Leadership development is a key practice of the organizations that we studied, and regular training sessions are an important part of this work. The leaders we interviewed talked about how they adapted their usual approaches to leader training to the use of digital tools. Though some had been skeptical about whether this would be successful, our respondents reported that participants were able to conduct these training sessions both internally and with other leaders across their region. But they had to plan how to adapt digital tools to make the training effective.

Katherine describes the logistics involved in adjusting strategies used for in-person meetings to the digital platform. She recalls,

*"...And so we had to figure out, like, can we even do a role play on Zoom? And what we figured out is that we have everybody turn off their camera except for the people in the role-play. And it worked pretty well. I mean, not quite as good as if you're in person, but it worked pretty well. And we usually do a 45 minute segment as part of teaching relational meetings where we put people in groups of three and they take turns either leading the relational meeting, being the person being met with, or being the person giving feedback. And we were able to do that pretty easily over zoom that seemed to work really well..."*

The success with digital training sessions, but not quite as good as in-person, was a shared experience of all the organizations. In the words of Katherine, technologies like zoom have enabled the leaders to "close the geographic distances" between them and their colleagues within and outside their organizations. This was one of the most significant advantages our leaders reported.

Another example comes from several sister organizations within one state that had for several years before the pandemic been running a public policy institute for clergy, especially for clergy new to organizing and new to the state. This public policy institute was conducted online via Zoom during the pandemic. Our leaders indicated that they felt it was successful, and that people stayed engaged and were indeed glad to connect with one another.

Online training sessions on Zoom also allowed leaders in the larger network to stay connected, meet more often than usual, share organizing experiences during the pandemic, and learn from each other. "We get to see each other so much more and learn from each other. So that's been

really great too..." shares Katherine. This allowed organizations to develop similar strategies on related issues.

### 5. Informational/research sessions and civic academies

Another use that these organizations made of digital organizing tools was to hold information sessions or "civic academies," bringing together leaders from across multiple organizations to learn about how to approach advocacy on specific issues. According to Charles, for a civic academy session, once an issue is identified, a research team works on it, interviews close to 30-40 people about the issue, and then decides what to do with all the information collected. Virtual civic academies would then explore a topic around the questions of "what happened?... And what to do about it?", describes Charles. He recalls that his organization held these civic academies for issues on workforce development, Covid-19, rent assistance, and on the electric grid during the pandemic.

Leaders from other organizations also mentioned sessions on these issues as well as criminal justice reform and the child tax credit. Leaders saw these as very helpful for their work; in some cases, scholars who had studied the issue presented information, and then participants had a chance to discuss and ask questions. Several leaders mentioned a national event involving more than one thousand leaders as helpful in shaping their advocacy within their own state or locality on the distribution of benefits such as rental assistance. For Michelle, connecting with other leaders was the biggest advantage of a digital civic academy session. She recalls,

*"...Being able to meet with people from different states and all over the country, for things that will help you to make a plan on how you're going to proceed, because... You need to know what is possible to do. You need to know if there's research that's done about it, and you need to know what other people have done... And then try to figure out how that would sit with your population by meeting with the politicians or different organizations in your area..."*

This ability to learn from other people's experiences and find solutions was certainly enhanced for many leaders due to the improved connectivity and accessibility provided by the digital platforms. Several of our respondents mentioned this use of digital tools as one that would continue after the pandemic, given that it is so much easier logistically to gather a large group from different regions in a virtual space. Such information sessions also make it more possible for local organizations to coordinate their work with other organizations in their state and region.

### 6. Meetings with public officials

Several leaders told us that some public officials were more willing to meet with their organization than was true before the pandemic. To some extent this was true of officials with whom the organizations already had relationships, but leaders also mentioned that in some cases officials who had been unwilling to meet with them became more willing during the pandemic.

For example, Esther talks about how the conditions of the pandemic made some public officials willing to meet with her organization:

*"Another thing that I would mention...is that...when everything is fractured...we were finding, we were able to talk with people with whom we would have not been able to get an appointment no matter what..."*

Esther went on to discuss how she was not sure exactly why in some cases they were able to get these meetings with public officials, but she speculates that

*“They had time maybe, or, they were just wanting to be, you know, in touch with people that had some insights and a conduit to people in the community...that we have somewhat uniquely amongst institutions.”*

She cited several examples of public officials who met with the organization virtually during the pandemic.

In another example, Thomas describes how a team of leaders began meeting with the state head of the department of corrections regarding their concerns over conditions in prisons and the spread of COVID-19. *“And we met with him for over six months about every other month...so for months we met with he and his staff and actually turned the tide on quite a few things.”* Among the policy changes they were able to advocate for were mask mandates in all facilities. Thomas feels that part of the reason the organization’s team was so effective was because they were able to consistently have the same set of leaders in the virtual meetings with the corrections department leadership:

*“It was myself and eight, depending on the day, eight to ten other community of faith leaders...I don't know that we would have had that much face time if we were doing that in person. And honestly, I don't know that we would have the cohesion in terms of the team that was actually meeting with [the director]. So zoom, you know, using technology really allowed us to be consistent in who we were meeting with and who was joining us on our side.”*

We heard these kinds of examples from other leaders as well. Public officials who might have been too busy or not interested in the work of the organization suddenly saw that these power organizations were finding ways to stay in touch with their leaders and their institutions, and thus had insight on what was happening in communities that was of value to the officials given the conditions of social isolation. Prior to the pandemic, meetings with public officials would have been primarily in person. However, several leaders noted that they thought these kinds of virtual meetings would continue as at least one option for meetings with public officials after the pandemic.

## 7. Changing work dynamic

Most of our leaders spoke of how intense the organizing work was during the pandemic.

*“So...those are some examples of new people...I think the intensity of the effort, because it became too much for some of our older leaders, quite frankly, it became too much for me for a while...So some of them, you know, felt the need to step back...but at the same time, the...policy work has engaged new faith leaders to come into the process...so that's also been very energizing...”* (Esther)

Another leader, who was also an organizer, noted that the familiar rhythm of work life had changed:

*“I know that like for me as a staff member, the rhythm of life really changed a lot, the rhythm of my work life. Because normally it's a lot of, you do a meeting, you hop in the car, you drive to the next meeting. And there was no hop in the car you drive to the next meeting. It was just like, okay, you click here and you're out of this meeting and now you click here and*

*you're into the next one. And, so it was much more efficient, but it was exhausting...I found myself over-scheduling myself, like not putting in time for lunch, not even thinking about going to the bathroom."*

But Katherine also noted that in some ways, once everyone was able to use digital tools to meet, it became easier to schedule meetings,

*"...if I needed to organize something or pull something together really quickly, I could because people were more available. I could start a Monday with my calendar being largely empty for the week and it would fill up as we went along."*

## Challenges

We asked leaders to describe some of the challenges that they experienced as they adapted their work to the new conditions of the pandemic. Some leaders mentioned challenges related to specific issue campaigns, but most also discussed how the shift to digital organizing, while it made continuing the work possible, also presented challenges for some of their work, and we focus on those responses here.

First, many leaders mentioned some of the challenges of maintaining the financial resources of the organization and member institutions, and specifically of doing fundraising for the organization during the pandemic. For example, leaders mentioned how it is often easier to do fundraising or ask for financial contributions when you are meeting with someone in person, rather than virtually. As Beverly put it, fundraising is "a very relational...experience" and this is awkward to do, especially when asking individuals for contributions, if it is not done in person. Still, several leaders also mentioned that they had done fundraisers during the pandemic using virtual tools such as zoom and "made it fun", as Linda said. Despite these challenges with fundraisers and concerns about financial support, most leaders reported that they had been able to manage to maintain much of their financial support during the pandemic.

Several of our leaders mentioned the federal assistance that was available during the pandemic, and that the organization had worked with member institutions to apply for PPP loans to help tide them over during the early days of the pandemic. In some cases, the organizations received this assistance as well. These responses came regarding our questions about the challenges that they experienced during the pandemic, and several leaders mentioned financial challenges that were somewhat alleviated with this assistance.

Second, many leaders also mentioned some of the challenges experienced in reaching out to new leaders and organizations during the pandemic. Traditionally this work would primarily happen in face-to-face meetings. In the circumstances of the pandemic, it became difficult to even know how to contact new organizations. As Darren put it,

*"I think one of the challenges is we're always trying to expand our base to get new congregations in...we also have a clergy caucus, so to get other clergy, rabbis, and imams a part of the conversation, as new pastors moved into the city, there really was not a space for all of us to gather. And so working on expanding the base has been, from my perspective, challenging because you're not able to actually get out and to organize and meet people"*

Some leaders reported that they had recruited new organizations through their issue campaigns during the pandemic and had been able to grow their membership. But other organizations worked

just to maintain their existing membership and help keep member institutions afloat, as discussed above.

A third challenge that leaders mentioned was the meetings that worked, but did not work as well as in person. Public actions or accountability sessions were one type of meeting that many leaders mentioned would likely be either in person, or hybrid, once it was possible to have large assemblies again. Several of our leaders talked about the energy that comes from people being together in one room putting pressure on public officials, and how this was less palpable, and thus less effective, in a virtual meeting.

Finally, leaders spoke of the challenges related to the inability to gather with other people, the trauma of the pandemic, and the attendant mental health concerns. Being able to connect with digital tools alleviated this somewhat, but leaders were realistic about the limits of this kind of connection as well. Patricia recalls that early in the pandemic,

*"...I felt isolation. I didn't see my grandkids. I couldn't touch my grandkids...but I try to keep busy. What it was on Zoom...there's a lot of people who didn't have that luxury or didn't have that to at least try to keep their minds occupied...I don't feel it would've been possible or to the extent that it was, had it not been for Zoom, you know, doing business in this way..."*

Patricia's experience exemplifies and highlights how, by using digital platforms like Zoom, leaders, and members of these organizations were able to reduce the sense of isolation by staying connected with each other, they were able to draw some comfort from each other when they were unable to meet their close family members. Leaders reported that digital tools had a positive impact on the mental well-being of the members and leaders during the periods of isolation of the pandemic. Patricia also recalls how, during their summer academies in 2020, one of the most significant issues that came out of their group was mental health and how the pandemic negatively impacted it. Digital platforms played a pivotal role in continuing the organizing work and maintaining some level of "normalcy" during these extraordinary times. Nevertheless, leaders were realistic about the many ways that the pandemic had created ongoing challenges that would not be easily overcome. Charles spoke of how the process of coming back from the pandemic would also require organizing and reorganizing member institutions, as well as the organization, to adapt the work again to changing conditions.

### **Practical and Theoretical Lessons**

The organizations that we studied were quite successful at carrying on with their work during the pandemic. We believe that this is partly because the process of pivoting, teaching and learning, and adapting is part of how these organizations operate (Gecan 2003; Hand, McKenna, and Oyakawa 2021). The flexibility and resilience of these organizations was remarkable, but also deeply related to experiences that were familiar to long-time leaders and organizers of adapting to surprisingly changed circumstances. This is part of the strength of this kind of organizing, and of all forms of organizing that focus on developing and building relationships among leaders.

We think that there are two practical implications for organizing, as well as a broader theoretical implication to our findings. First, the "pivot" that these organizations and leaders were able to accomplish to digital organizing during the pandemic did not just happen. Leaders gave a good deal of thought to how to adapt digital tools for practical use, and to what kinds of adaptations

would be needed to make these tools effective for organizing. The organizations also invested considerable time and energy in making sure that their leaders and member institutions were able to access and use digital tools to continue their organizing work. In other words, this “pivot” to the use of digital tools took organizing to make it happen. Second, leaders gave some thought to how their organizations might continue to use these innovations. Leaders thought that their organizations would continue to use Zoom for business meetings and some other types of ongoing meetings while also continuing to use face-to-face meetings. Given their experiences during the pandemic, leaders had given thought to how they might continue to use digital tools, and for what kinds of purposes. Most leaders felt that there would be a preference for individual and small group meetings to be held in person, with the use of digital meetings for convenience as needed. This was true also for large public actions, which most leaders seemed to feel were more effective in person, despite the logistical challenges of such events.

However, for some kinds of meetings such as research actions, meetings with policy experts, team planning meetings, and even some meetings with public officials, many leaders felt that digital meetings would be useful. In general, leaders seemed to feel that this newfound access to and knowledge of digital tools on the part of their organizations would be an asset for all that they would need to be thoughtful about how to use these tools. As Charles said, *“It shortens timelines for us and makes it easier for people to meet and to act.”*

This brings us to a more theoretical implication of our findings. The emphasis on face-to-face meetings and on building relationships that had been key to the work of these organizations before the pandemic forced the adaptation to the use of digital tools did not seem to be changed, at least as our leaders spoke about their work. Many leaders, like Ruth, emphasized that the existing relationships within the community that the organization had built were the most integral factor, and digital platforms just facilitated them. She recalls,

*“...we were involved in schools so much, and they were going virtual, we learned to go virtual, and because we have the relationships, it just meant another way of connecting to each other...the relationship was the strongest thing that helps us to get connected...the virtuality was just a process.”*

These leaders emphasized that digital tools were not organizing but rather a tool for organizing. Leaders continued to emphasize that organizing work was about relationships, and building and maintaining those relationships was crucial to building power to act in their communities. This was true whether relationships were built in person or with digital tools. Thus, the theoretical point about organizing is that what matters are the relationships, not the way that those relationships are built or maintained, especially in an emergency such as the pandemic. But further, most leaders felt that, when in-person meetings were possible, they would be crucial to the ongoing work of the organization. Digital organizing, then, is a tool, but not a method of organizing. To build power, relationships are crucial, and most leaders felt that in-person meetings would still be the lifeblood of organizing.



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