

Organizational Infrastructure Lessons

By LeftRoots National Operations Team, (v2)

This document summarizes the lessons LeftRoots has learned on organizational infrastructure. We draw these lessons from our experience building and sustaining LeftRoots as an explicitly socialist, time-limited, national, cadre-fication project from 2013-2023. We offer these lessons to the comrades in the Initiating Cores of the S.O.S Process, who have taken on the task to launch one or more new or renewed cadre organizations. We hope that you find them helpful as you design and build infrastructure for new cadre org(s).

Table of Contents

- 1. Approach to Operations**
- 2. Legal & Personnel**
- 3. Fundraising & Finances**
- 4. Technology & Communications**
- 5. Political Security**
- 6. List of Tools Available (by request)**

1. Approach to Operations

LeftRoots officially launched in 2013 with no paid staff, \$15k in the bank, and a mighty team of 6 people. Now, in the summer of 2023 and only a few months from sunseting, LeftRoots' work is held across 14 teams operated by about 50 members (8 of whom are paid staff, 3 primarily dedicated to Ops), and a general operating budget of \$800k. This growth was made possible by the efforts of all the people that have built and sustained LR, mostly in a non-paid capacity, and by how we approached operations work in general.

We use "operations work" to refer to the work needed to build and sustain LeftRoots' infrastructure, which in turn makes it possible to implement program plans and meet political goals. In LeftRoots we organized this operations work into 5 areas that eventually became inter-dependent teams: Finance & Fundraising, Legal & Personnel, Technology & Communication, Political Security, and Event Logistics.

Our approach to operations work and the key lessons we draw:

- Infrastructure is essential to political organizations. Operations work, as in the work that builds, maintains, and grows organizational infrastructure should be held in service to the organization's political purpose and all the programs designed to realize it.
- Grounded in our socialist-feminist values, we value all operations-related labor, and strive to visibilize it and assume it as a collective responsibility of all members. Even when it makes sense for a smaller group of people to hold operations work, regardless of paid/unpaid labor, it should remain assumed as a collective necessity and responsibility.
- Operations work can take significant resources, human and financial. The organization must ensure both to carry out day-to-day operations, be ready to pivot as conditions shift, and tending to intentional and sustained growth over time.
- Politically grounded leadership is essential in all operations work. In LeftRoots, this looked like having a designated role of "Org-building Director" responsible for overseeing the work and growth of all Operations teams in alignment with our political goals and organizational culture. To fill this role, we looked for a comrade that had demonstrated high clarity and alignment with LR's purpose and approach and experience in building and sustaining political organizations. The org-building director (as were all other director level roles), was intentionally integrated into the standing meetings of national leadership bodies (without a vote in the case of

bodies meant for elected leaders) where discussions related to planning, assessment, and discussion on programs occurred. Each of the 5 Ops teams had at least 2 members in the role of “co-leads” responsible for leading the team in alignment with its charge, making assessments of collective bandwidth and capacities, and representing their team in cross- team collaborative projects.

- Clear, efficient, and adaptable organization of operations work is critical to be able to maximize capacity and resources available. For us this looked like organizing the 5 areas of Ops work into respective teams. Each team had a clear delineation of their charge, standing meetings, and at least 2 members in the role of “co-leads” responsible for moving and holding the team in alignment with its charge. Teams often changed their meeting frequency to adapt to shifting conditions and for the sake of making best use of people’s time and bandwidth. We sometimes created temporary containers or teams to carry out projects that required cross-team collaboration.

2. Legal & Personnel

Brief History of our Legal Structure

Left organizations have taken on different legal (or extra-legal) forms throughout our history in the US, depending on the political/historical context, IRS code at the time, and many other factors. LeftRoots is a new type of Left organization for our 21st century context. We are conscious of the need to battle the legacy of anti-communism, both from our opposition but also from our own base. We are, by intention, rooted in US social movement forces, most of whom have been politicized after 1991, in the context of a weakened, marginalized and fragmented Left and the rise of neoliberal capitalism.

Until mid-2014, LeftRoots was operating as an unincorporated association with a PayPal account & cash donations; the 2 staff were paid through small grants and donations to a separate but related nonprofit project. As the organization began to grow, we researched several potential structures to address the contradiction of being a revolutionary organization operating within the structures of the current State. We assessed about 6 different not-for-profit and business forms and consulted with a wide range of consultants, CPAs, organizational leaders, and others. In the summer of 2014, the LeftRoots Coordinating Committee approved the structure that we have used since that time: a private, non-stock (class C) Corporation.

As an independently-funded political organization we didn't fit neatly into any category that we researched. Conceptually we are more like a political party than any other structure, but there is not a legal form for such an entity that isn't completely based in state-by-state, bourgeois electoral rules about qualifying to be on a ballot. We are not a political party in this respect. In terms of daily operations, within 'business' forms we are much more like a small business than a major corporation that can have shareholders etc. But many business forms have one or just a couple of private owners and are organized to provide income/profits to those individuals. These types of businesses are legally tied to those individuals. We needed an organizational form that is legally independent from any of us as individuals—for political, security and tax reasons.

While LeftRoots has had many of the internal characteristics of a progressive nonprofit or cooperative, we ultimately decided not to go the c3 route. This decision was based on our assessment that the risks of state intervention would be much higher with the c3 legal structure and the fact that, under US law and code, corporations have many more rights than not-for-profit entities. With all these considerations in mind, we decided to legally incorporate as a private, non-stock Corporation (class c) with "Directors", but no shareholders, and without any

profit-making intentions. The legal owners of LeftRoots, Inc. were the “Board of Directors,” who were the National Coordinating Committee. The NCC are leaders accountable to the LR membership and (eventually) directly elected from the membership.

LeftRoots, Inc. is a legally separate entity from any of the individuals involved in it and is taxed separately. We have been organized to minimize any tax liability, since our net income is taxable as ‘profits.’ In the process of registering as a corporation with the Secretary of State, we have documented that we have no plans to issue shares or have shareholders.

While we are not a c3 nonprofit, we’ve chosen a partner who is, primarily so that LeftRoots supporters who want to make very large, tax-deductible contributions, can do so. We spent a good amount of time looking for a politically aligned/supportive nonprofit with some level of Left staff & Board leadership to partner with, to serve as the fiscal sponsor of a related, nonprofit LeftRoots educational project. This structure allows LR to have the political independence of a US business, while getting some of the benefits of the nonprofit structure.

Lessons Learned on Legal Structure:

- Any revolutionary political organization operating in the US will have to navigate the contradiction of being an anti-capitalist organization operating in the “belly of the beast” where the State sets the legal parameters for the incorporation of political entities, and has full capability to enforce such laws. In LeftRoots, our assessment is that we are currently not at a stage of struggle in which we can (successfully) challenge the State’s limitations on political entities.
- Legal structure should help maximize political independence and ability to operate openly, securely, and successfully as a Left, socialist organization—particularly to raise money openly.
- Operating legally also helps to have a good reputation among our base and beyond. This is important given the legacy of anti-communism in the US.
- The legal structure should not pose undue administrative burden, particularly when capacity is limited—so that we can achieve our political objectives;

- The legal structure should provide some level of security for the organizations' members and supporters making contributions and minimize risks to the extent that is reasonable for each stage of the work.
- The legal structure should maximize flexibility in sources of revenue (given the limits of funding for explicitly Left work) and help facilitate the success & growth of the organization.
- The legal structure should have a system for financial accountability to members and leaders.
- The legal structure should reflect the identity as a Left political vehicle independent from the nonprofit social movements infrastructure, not compete for funding from the same limited philanthropic dollars that our mass/social movement organizations depend upon, and provide an experimental alternative to the over-utilized and contradictory nonprofit structure. This, however, should not override practical considerations.

Approach to Personnel

Over the last 10 years we've grown from having 0 staff to having 8 paid staff with varying degrees of organizational leadership, all with a high degree of responsibility. As the organization evolved, so did the role of staff as a collective body.

In the early years, when membership and national leadership were in the process of consolidating, a small group of paid and unpaid members carried out the day-to-day operations and held national coordination roles. It is in these conditions that these members consolidated as a "staff team" that met weekly, reported to the elected National Coordinating Committee (NCC), and provided significant organizational leadership. As membership and elected bodies became more consolidated, evenly-developed, and disciplined, coordination roles expanded outside the staff team (many in an unpaid capacity) and new elected bodies emerged. These conditions made the need for a staff team less and less relevant, although all staff continued to hold high level coordination and leadership roles in operations and program teams and, except for the National Secretary, remain vote-less members of elected leadership bodies.

As a membership organization with an elected leadership our orientation is that 'staff are members first'. We have hired almost exclusively from our membership base, ensuring that paid staff come in with a high degree of pre-existing commitment to our organizational purpose. LeftRoots has traditional HR policies for staff, but our expectations for staff conduct, discipline and accountability are

primarily shaped by the expectations for all LeftRoots members. This collective unity has made it possible for members (and staff) to support each other to overcome challenges that would be considered “personal” or “private” in most workplace settings, like physical or mental health crises or family emergencies. We can do this with our staff with mutual clarity about where individual and collective responsibility lies, because our basis of unity is our membership in LeftRoots, and any employment relationships are secondary to this.

Determining a salary structure in an organization committed to socialism is no easy task and has been an ongoing tension within LeftRoots. Our initial commitment was to ensure staff received a decent wage. We did not want to support careerism and did not believe that market rates were effective guide for our purposes. From 2015 to 2020 staff were paid in the range of \$50,000 - \$60,000 per year. In 2021, with the recognition that several staff were struggling financially, we developed a new salary and benefits scale that tried to balance cost of living, level of expertise and responsibility, particular needs of each employee, and organizational fundraising capacity and financial health. This new scale was decent but still not competitive when compared to salaries offered by other movement organizations for similar positions. The scale ranged between \$65,000 and \$75,000 per year for full time positions. Our benefits structure offered health (and eventually dental) insurance to employees and child dependents, as well as \$1,000 annually to help pay for employee’s health care expenses not covered by insurance offered through a “FSA” or flexible spending account and up to \$5,000 annual to help pay for childcare expenses offered through a “PBA” or personal benefits account.

LeftRoots members that became employees did so for the sake of making LeftRoots their primary full-time contribution to the movement. For some, this choice meant a decrease in income.

Lessons Learned on Personnel

As the staff structure at LeftRoots has grown, several guiding principles have been essential to ensuring that we stay true to our commitment as revolutionaries and build a staff and internal organizational culture capable of navigating contradictions and crisis, with sufficient resilience and discipline.

These principles are:

- Building an effective revolutionary organization requires having people who can realign their political and financial commitments to focus on building the organization. This is especially true in a context like the US where Left infrastructure is so weak.

- All staff are cadre first and foremost. The political commitment they have made to LeftRoots is primary and the staff role is in service of the political commitment they have already made. Staff members must fulfill their role as cadre, which is not paid. LeftRoots has hired operations staff who are not cadre to fulfill specific roles, but they were still expected to abide by the code of conduct for cadre.
- It takes leadership to build leadership. By virtue of spending the most time engaging directly with organizational work (between 20 hours and up to even 60+), staff members will be better positioned to hold and carryout coordination roles, which in turn positions them to offer grounded leadership. In LeftRoots, we struggled -but eventually succeeded- in having staff members' field the day-to-day operations and coordination of programs for the cadrefication, cohesion, leadership, and functionality of elected leadership bodies and membership. When planning for division of labor we must be grounded in assessments of the conditions and needs of the organization, and in particular by the state of cohesion, capacities, and bandwidth of membership, teams, and elected bodies.
- We approach our work as socialists and feminists. This means we value all labor, visibilize all forms of labor, and ensure different forms of labor are shared equitably.

Payroll & Benefits Administration

LeftRoots initially had two staff members who were both in California. This made setting up payroll pretty straightforward. However, as the staff grew and additional hires were made outside of CA, payroll became more complicated.

We considered two options to manage staff in multiple states. The first option was to file the necessary paperwork ourselves to establish LR as an employer in multiple states. The second was to use a PEO (Professional Employer Organization) that would do this for LR. The additional benefit of a PEO is that it allows for potential savings on benefits due to the fact that employees are pooled into a much larger group that can result in better rates. There are some additional factors to consider when evaluating whether or not a PEO makes sense which we will expand upon in the lessons learned section below. Also, the cost for PEO's (like JustWorks) is considerably more than a standard payroll processing service.

We decided to move forward with a PEO but the two providers we contacted denied our request. They looked at LR's website and determined, based upon

photos, that we engaged in protest activity and said we were disqualified because they could not cover us under their workers comp policies.

Because it did not work out moving forward with a PEO service, we eventually set LR up as an employer in multiple states (5 different states). However, in order to streamline this process, we used a third party service to manage the administrative tasks of establishing LR as an employer in multiple states. We determined that the cost for this service was worth the confidence that everything was done properly. Without using a third party service such as this it can be confusing to navigate because each state has its own process for becoming a compliant employer and its own unique payroll tax administration.

This worked out okay but was definitely more work and added more admin complication than a PEO would have.

For benefit administration we used our payroll provider, Paychex, as the benefit broker. This streamlined all of our payroll and benefits within the same service provider. The drawback is that with a company as large as Paychex there is continual turnover and it can be hard to have consistent communication with a broker to get support for navigating benefit related questions.

Lessons Learned on Payment & Benefits Administration

From our experience we would recommend that future orgs consider using a PEO when setting up payroll & benefits if they anticipate staff in multiple states. It does increase the monthly admin cost but it reduces the responsibility to manage payroll & other tax responsibilities for multiple states which can be a burden.

If future orgs do choose to go with a PEO we recommend they be very careful with how they communicate the type of work that the organization is involved with. If any red flags are raised that staff may be involved, in their capacity as staff, in protest activity they will deny your request to use their service.

Here are some PEO's to consider:

- JustWorks
- Ripling

3. Fundraising & Finances

Brief History of LeftRoots' Fundraising

As an intervention to strengthen the US Left, we wanted to avoid exacerbating competition for funding among movement organizations. As an explicit socialist intervention in the US, we wanted to be able to raise funds (despite wide-spread anticommunist sentiment) while having autonomy over our funds. This led us to decide early in the project that our fundraising approach would be one where we deprioritized grants and prioritized membership dues, member led fundraising campaigns, and individual major donor organizing as our primary sources of income.

While membership dues were a steady source of income, they covered a small fraction of our annual budget. We continued to have membership dues thru the end of LeftRoots because dues offered a concrete way for members to build and sustain the organization. Members could request their dues be lowered or temporarily suspended if their particular conditions required them to do so. For the most part, members were eager to contribute their dues on-time. Occasionally our payment system failed to charge monthly contributions or members would forget to update their payment card information, which resulted in members getting behind on their dues. When this happened, members and dues team would come up with a plan to get the member caught up.

We carried out 3 membership driven fundraising campaigns with incremental goal amounts. The first time, in 2015, we aimed for \$30k in 5 days; the second time, in 2017, we aimed for \$100k in 5 days; the third and last time, in 2019, we aimed for \$200k. We met (and surpassed) the goals while strengthening internal morale, sense of collective achievement, and giving members an opportunity to practice talking about LeftRoots and their commitment to it publicly. These campaigns also strengthened relationships with existing individual major donors, brought in more monthly supporters, and gave LeftRoots more visibility that led to meeting new individual major donors. While these campaigns were successful and met a myriad of goals, they required a lot of bandwidth from a significant portion of membership to plan and implement. While they were sufficient to keep the lights on, by 2019 we were still unable to accumulate reserves. We fundraised as we went and often faced tight cash-flow issues.

As the organization consolidated, our cadreification and strategy development process intensified, requiring higher rigor and engagement from members in those areas of work. In 2020 and every year until our sunset, we decided to not hold org-wide fundraising campaigns and instead invested in increasing paid fundraising capacity and revamping of our fundraising team and approach. Out of this revamping we consolidated individual major donor organizing as our primary source of income, through which we were able to increase our annual budget from \$550k in 2019 to \$850k in 2022. This increase allowed us to increase salary and benefits increases for employees (whom had been working at around \$50k annually), increase number of employees, establish budgets for cadre circles, and create a dependent care fund. If we had not been a short term project, we might have considered holding off on increasing our budget and instead focused on

increasing fundraising capacity and reserves. Given our short-term nature and the concrete and essential needs to realize our political purpose, we chose to focus on increasing our fundraising capacity to meet higher annual budget goals, even if that meant not been able to accumulate reserves and continuing to “fund the plane as we fly it”.

Lessons Learned on Fundraising

Political Organizations require finance and fundraising capacities and systems in order to function. Finance and fundraising goals should strive to make our political purpose more possible, able to grow and pivot as organizational conditions and needs call for.

Fundraising for explicit socialist projects is hard. (Not that any other type of fundraising is easy.) In LeftRoots, not only were we an explicit anti-capitalist and pro-socialist project, we were also committed to not risk further fragmentation by being in competition over grants with SML organizations.

Diversifying sources of income and deciding when and how to tap into them. While most of our income came from individual major donors, we continued to invest capacity in sustaining other sources of income for different reasons. When the organization was still cohering and while we were cultivating new individual major donors, it made sense to hold org-wide fundraising campaigns that helped boost morale among membership while concretizing pledges from major donors. They took a lot of capacity but the outcome made it worth it. Later on, when membership was consolidated and we had sufficient multi-year commitments from individual major donors we decided to not do org-wide fundraising campaigning. This also allowed for members' bandwidth to go towards cadreification and strategy development work.

Fundraising work requires significant bandwidth and coordination to carry out. In LeftRoots it required a steady team anchored by members in paid capacity with lots of contributions from non-paid members.

Bookkeeping Systems

LeftRoots used QuickBooks for its accounting purposes. We chose the desktop software option, instead of the cloud based version of QB, for security reasons.

A challenge of not using a cloud based version of accounting software is that the desktop software option restricts who in the organization has access. This has been challenging over the history of LeftRoots as the responsibility for managing bookkeeping tasks has changed hands a few times and at times these tasks have been shared by multiple people.

One option to consider for future orgs is whether or not a cloud based software could be used to increase access but at the same time implementing a system so that names of individuals are not entered in full into the software for privacy reasons. While cloud based software does allow for more security risks, there are always going to be risks with financial transactions (whether it is funds going in

or out of the org). If the State wanted to access financial data, they would ultimately be able to do so by accessing bank records even if the accounting data file was not accessible on the cloud. Future orgs will have to balance: the convenience of having accounting software that is readily accessible to multiple people within the organization with the security concerns about what personal information the accounting data contains.

Bill Payment System

We eventually moved from hand writing checks to using our primary bank's bill pay service and making transfers via paypal to issue payments.

We would highly recommend using some sort of bill payment system for future orgs. Managing a physical checkbook means that the org must navigate the complication of having someone who is an authorized signer be involved in regular bookkeeping tasks. Most likely this is not the best use of this person's time. Using a bill pay service allows for the primary org bookkeeper to process payments with minimal responsibility for a check signer who is most likely in leadership and has limited capacity.

For financial safeguards you may want a bill payment system that allows for an approval process like bill.com. There are also banks that allow for a bill payment service with an approval process built in like Relay. Using services like this also brings up question about privacy and security. Future orgs will have to determine their orientation to these security considerations but an important question to wrestle with is whether or not the underlying vulnerability of any financial transaction is substantively reduced by not using a cloud based service.

4. Technology & Communications

In our efforts, we need information technology systems so we can communicate and collaborate efficiently and securely.

Though most of us have smartphones and computers, and most of us have experience browsing the web, using electronic mail (email) and participating in videoconferences, we do not all have the same access to and facility with these tools. To many of us, information technology can be intimidating, confusing or frustrating.

While LeftRoots benefited from having a few comrades with special skills (design, web development, system administration, information security), we had to balance our need for secure communication and collaboration with grounded perspective on the varied capacity of our members to achieve competency in the use of information technology. So, in the course of LeftRoots' life, we successfully adopted and utilized a fairly limited set of information technology tools and practices.

In many cases, the lessons to be garnered from LeftRoots' experience are less about the specific tools or practices that we chose (or abandoned) than about the process of having come to where we landed. This document attempts to lift up the lessons that might be relevant or transferable to other Left formations, given the rapidity of change in the realm of information technology.

This section is organized into two general sections: (1) operations and (2) specific information technology utilization and outcomes. Operations largely omits planning, management and decision making because much of that work in LeftRoots was done independently by a few individuals early in the life of the organization.

User Training & Support

- When individuals joined LeftRoots (and, later, the S.O.S. process), they were expected to be able to have or to develop facility with the use of Signal, electronic mail, calendars (in the case of LeftRoots), file sharing and document collaboration tools. A detailed internal tech guide with both background information and step-by-step instructions was a key element in enabling members to satisfy this expectation.
- In addition to providing the tech guide to its members, LeftRoots experimented with having a team devoted to tech support, but this experiment failed because the organization did not devote enough organizing capacity to the development of that team. So responsibility for tech support fell largely onto LeftRoots staff.
- As LeftRoots brought others into the S.O.S. process, a more concise tech guide again proved key to efficiently "onboarding" those individuals. And, again, staff held responsibility for most of the small amount of additional tech support that was required and that could not be managed informally by peers.

Administration of Tech Systems

Where LeftRoots had greater success collectivizing tech work, eventually, was in its tech admin team. This team collectively held responsibility for doing the majority of the tech work in LeftRoots, including making web site updates, sending email blasts to members and supporters, and setting up and hosting online events.

The success of the tech team resulted from three factors:

- Recognizing that work necessary to "keep the lights on", work requiring advanced tech skills and work requiring a significant time investment had to be done by staff or be contracted to tech professionals, rather than being collectivized in a team of less accountable volunteers;
- Anchoring the areas of work with a dedicated member or staff member who was accountable for managing and collectivizing the work in that area;
- Concretely determining the specific skills required of the team members, making a plan for developing (and retaining) those skills and regularly assessing team members' development.

In LeftRoots, the two principal work areas, each anchored by a dedicated team member, were web site maintenance and events. The former encompassed both public-facing and internal web sites. The latter encompassed the organization's relationship management and videoconferencing tools. As mentioned, other areas of information technology work were held by staff or by contractors.

There was significant overlap between the two principal work areas. For example, email blasts to members or recordings of online events would usually be posted to one of the organization's web sites. So though each work area was anchored by a dedicated team member, all members of the team generally had skills in both areas. Where a hand-off of work was required, the LeftRoots tech team had some success utilizing a work-management tool (Asana) for coordinating and communicating progress on tasks, though most coordination and communication was done in a group Signal chat thread.

Specific Technology Decisions and Outcomes

I.T. Services Hosting—May First

All of LeftRoots' I.T. services except videoconferencing (Zoom), video hosting (Vimeo) and password management (1Password) — web, email, DNS, calendaring, file sharing etc. — were hosted on systems run by May First (<http://mayfirst.coop/>). This choice had both benefits and drawbacks;

Benefits:

- left-owned cooperative
- politically aligned; would advocate for LR if necessary (against law enforcement)

- affordable; (not giving money to Google or Microsoft or Amazon)
- good control panel; easy to create email addresses
- getting better all the time

Drawbacks:

- small, under-resourced organization; so the tech is not as user-friendly as alternatives, which has a large impact on day-to-day work; updates are not always timely, or the update has un-warned side effects
- left orientation makes them a target of adversaries
- all accounts live in the same name space; new account creation process results in confusing defaults (email address), too much work and confusion for users

Web Services

LeftRoots used Wordpress as its web content management system. The process of choosing Wordpress is lost in history.

What we found is that a proliferation of plugins resulted in bloat, inefficiency and a needlessly large attack surface. Eventually, with the help of outside contractors, we pared down the site to the minimum necessary to satisfy the organization's needs.

Asynchronous Communication

LeftRoots required members to use May First-hosted @leftroots.net email for internal email communication, to limit the exposure of communications. POP or IMAP access was encouraged, though Roundcube webmail was also used. S.O.S. participants were also given May First-hosted email accounts, to constrain email travel in the same way.

Signal chat was widely used as a more secure alternative to email (though the use cases are somewhat different). Signal offers a feature to authenticate a contact by scanning a code directly from the contact's phone, requiring in-person meeting. While LeftRoots members were encouraged to do so during organizational in-person gatherings, we mostly didn't. If the new cadre org were to deem mutual authentication necessary, we would recommend making it a requirement (vs highly encouraged).

LeftRoots attempted to use PGP/GPG to sign and encrypt email messages, but as the rest of the world has amply demonstrated, email encryption is a difficult egg to hatch.

Synchronous Communication

LeftRoots used Zoom for almost all videoconferencing. Numerous accounts were established, to allow for simultaneous meetings without timing collisions. One

account was assigned to each staff member, and a handful of shared accounts were set aside for members to use as needed.

LeftRoots attempted briefly to use Jitsi Meet as a free alternative to Zoom, but in many cases its capabilities did not satisfy the organization's needs. It probably deserved to be given more of a chance.

Similarly, Signal was probably underutilized for videoconferencing in LeftRoots.

File Sharing & Document Collaboration

For file sharing and document collaboration, LeftRoots used Nextcloud, provided by May First. S.O.S. participants were also given Nextcloud accounts.

The principal challenges of Nextcloud were how to structure the file system in a way that made sense and how to control access. Because of the shared May First infrastructure, LeftRoots did not use publicly visible Nextcloud circles for access control, which made it impossible for a user to directly share a document or folder with a circle of which that user was not a member. These challenges were never satisfactorily resolved, with the main result being multiple copies of key documents scattered in different places and haphazard sharing of documents.

Ideally, access control would have been managed by establishing clear folder structures that would obviate the need for re-sharing of things. But in practice the complicated and shifting relationships between teams made that structuring unattainable.

In some cases, RiseUp etherpads were used to allow real-time collaboration (e.g. reporting back from numerous small-group breakout sessions during a videoconference), as an alternative to the easily-overwhelmed May First Nextcloud markdown editor. Given security considerations we decided to avoid google.

File Calendaring & Scheduling

Calendaring was also provided by May First, with inconsistent adoption by LeftRoots members. In general, calendars were used to make team meeting times visible rather than to determine the availability of people. May First calendars were also used to communicate the use of specific zoom rooms.

Nextcloud polls provided the ability to negotiate meeting times, though individual LeftRoots members generally used whatever they were familiar with (Calendly, Doodle, WhenToMeet etc.) which needlessly exposed operations to security risks. The organization would have benefited from earlier adoption of a standard for secure schedule negotiation.

Relationship Management

LeftRoots used CiviCRM for managing its database of members, supporters, events, mailings, contributions, activities, etc. The learning curve for CiviCRM is

essentially endless. The lack of deliberate training and coordination resulted in underutilization as well as cruft and other inefficiencies in the system itself.

Password Management

LeftRoots used 1Password to enable controlled sharing among staff of passwords in situations in which the use of individual passwords was not possible.

Work Management

During the LeftRoots homestretch, leadership recognized the need for a tool to improve its awareness of the work of the various teams within the organization. A decision was made to try adopting (and adapting) Asana as the tool for providing this awareness. Though some teams and some individuals used Asana successfully to manage their work, the use of Asana organization-wide was not completed enough to satisfy the original goal. The teams that used Asana consistently assessed it as helpful specially for projects with multiple areas of detailed work that required more de-centralization.

Video Hosting

LeftRoots used Vimeo for hosting video recordings, with most videos configured to be embedded only in LeftRoots-controlled web sites. In some cases, videos were shared directly from Vimeo using a password to control access.

5. Political Security

Orientation to Political Security

Given the extensive history of targeting of left organizations by the State and right-wing forces, we believe that strong security protocols and practices are essential for any Left project. With this in mind, LeftRoots created a Security Team charged with assessing threats and risks and developing grounded practices to address them. Our approach has been to ensure we are vigilant against grounded security concerns while also avoiding paranoia. This means adopting reasonable security practices to reduce risks while maintaining our ability to move our work forward.

The LeftRoots Security Team conducts regular Risk Assessments to help the organization not only monitor risks in the conjuncture, but to determine the priority of these risks. We believe that if LeftRoots is able to "rate" risks to the best of our ability in line with the conjuncture and the work being moved, then we will be able to make decisions about political security and carry out security responses to certain scenarios that are right-sized. The team bases our assessment on five risk areas: state actors, corporate actors, horizontal forces, right wing forces, random attackers, and contradictions within the left.

Based on our assessment of risks, the Security Team develops security protocols, orients members to new practices, provides guidance on questions arising from our work, and creates resources to mitigate risks. The team also does regular scenario planning related to potential threats. A key part of our work is to ensure a strong overall security culture that transcends pessimism about our ability to minimize the damage from attacks.

Security Principles

Based on our experience over the last ten years, we developed the following principles to guide our work:

- Stay vigilant and disciplined. Keep your security consciousness on, even when you are not in explicitly political meetings, and constantly exercise your security muscles.
- Work to transcend the pessimism that increasing security is hopeless, and the individualism that implies security is about protecting yourself. Our opposition is powerful but it is possible to decrease risk, and security is about protecting each other and our collective work.
- Our work is a strong defense. By building relationships with each other through our work, and building public support, we decrease the risks of internal and external conflict and attacks.
- Respect comrades' privacy. Be clear what about our work can be shared publicly, what can be shared with trusted comrades and family members, and what stays confidential.

- Think about how sensitive topics, information, and documents are, and how secure different meeting settings and communication channels are. Based on that, consider what should be discussed or communicated (if at all) in what channels.
- Reduce technology-related risks.
- Do not joke about violence or illegal activities. Avoid joking about surveillance, in order to reduce the likelihood that the joke gets used as implied consent. Intervene if you or a comrade make a joke to clarify you are not planning violence or illegal activities, and that you do not consent to surveillance.
- Do not collaborate with the State. Do not identify or inform on comrades, provide information to law enforcement, talk to law enforcement (especially federal agents where “lying” is a crime) before talking with an attorney, consent to searches, or testify against comrades.

Lessons Learned on Political Security

During the 10 years that LeftRoots has had a team of members focused on political security, we have continued to sharpen our practice and develop the tools that we are sharing now. Because tools alone can't entirely communicate the breadth of the work that went into developing them, we wanted to provide an abbreviated overview of some of the major lessons we learned in the course of this work:

It is important to have a dedicated security team that meets and does risk assessments regularly, develops protocols and practices, and ensures a strong security culture. Without a team dedicated to the important project of political security, it is easy for organizational and individual practices to fall by the wayside and create unnecessary vulnerabilities to a political project.

Taking on the practice of risk assessment can easily be overwhelming and lead to rabbit holing when there are not clear constraints that help guide you to be intentional in what level of analysis you are taking on. For this reason, it is critical to be clear on who or what you are assessing, whether it be your organization, a project of it, or a highly visible individual.

Scenario planning takes time. It is both a critical part of our work and also needs some space to explore. Scenario planning allows for looking at the people or organizations we are trying to protect or the threats themselves from multiple angles which can unlock new thinking around vulnerabilities to mitigate and possible interventions to help minimize those vulnerabilities. It is worth doing this work early because of how long it takes and because the things it reveals will lead to new practice and defenses. It is important to plan for both scenarios that are most likely to occur and those that would have the greatest impact on our work.

Security protocols and security culture are only as strong as they are understood and practiced by those who are going to implement them. Reinforcing and checking for understanding via key trainings and reminders will lessen slip ups.

It is challenging to attend to political security while staying grounded in the principle that our work is our best defense. If we are too secretive, we will fail to build a movement. If we are too open, we will make ourselves vulnerable to disruption and attack. We need to balance protecting each other and the organization with the need to share and build support for our vision and politics.

The tools that we developed were created for a cadre organization, so it is worth noting that a cadre organization implementing a liberatory strategy is likely to face greater risks than we did and may therefore need more rigorous protocols.

Key Tools

LR Risk Assessment Tool: This tool helps us regularly assess how our opposition is organized and share this assessment with the organization so that all teams and cadres can manage risk while continuing to move our work forward.

Latest Risk Assessment: This is LeftRoots' latest Risk Assessment and provides an example of how we have approached this task.

LR Security Protocols: The Security Protocols provide a regularly updated guide to all of LR's security guidelines based on our most current risk assessment.

Outside Resources: Here are a few key external resources we have used:

- VCW Toolkit: <https://share.mayfirst.org/f/18126783>
- Weathering the Storm Toolkit: <https://share.mayfirst.org/f/18127018>