PolicyLink

Lifting Up What Works®

Click Here for Change:

Your Guide to the E-Advocacy Revolution

Community Technology Foundation of California

PolicyLink is a national research and action institute that works collaboratively to develop and implement local, state, and federal policies to achieve economic and social equity. By Lifting Up What Works—using research to understand and demonstrate the possibilities for positive change—PolicyLink presents new and innovative solutions to old problems.

The Community Technology Foundation of California (CTFC) enables California's nonprofit sector to unleash the power of communities through the use of technology. CTFC is a statewide public foundation dedicated to increasing access to and use of information and telecommunications technology by underserved communities. Founded in 1998, CTFC operates a portfolio of innovative grant making, initiatives and leadership programs through an array of partnerships with nonprofits, philanthropy and corporations.

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Arnold Chandler, *Author*

Glenda Johnson, *Editor*

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We appreciate the time that organizations and coalitions spent with us, sharing information and points of view about their current and future e-advocacy strategies. A list of the interviewees is located in the Appendix.

Finally, we are indebted to the PolicyLink staff who contributed to the development of this report: Judith Bell for framing, reviewing, and advising on manuscript drafts; Milly Hawk Daniel and Glenda Johnson for excellent editorial input; and Leslie Yang for managing the production of the report.

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Preface

Advocacy is essential for anyone working with low-income communities and communities of color. It is the major means of ensuring that the benefits of this nation's resources are shared by everyone. The struggle may be for good housing available to people at a range of incomes, secure jobs and accessible transportation to reach them, or healthy communities with clean air, parks, and close-by neighborhood supermarkets that offer quality food and produce. Whatever it may be, all residents of this nation have the right to take action when their rights are threatened or denied.

PolicyLink and the Community Technology Foundation of California have always recognized the necessity of advocating for change. With that recognition comes the responsibility to share what we know about how change happens and how individuals and organizations working together can impact the policies that are often at the root of inequity.

Click Here for Change: Your Guide to the E-Advocacy Revolution is one result of our shared commitment. This manual was written for experienced and novice advocates alike who are eager to use state of the art technology techniques to challenge old policies and create new ones that will enhance the quality of life and access to opportunity for everyone. The case studies, resources, tips, and best practices included in this report will help readers plan and implement campaigns that use various combinations of online and offline tools to effectively engage their constituencies. Of course, technology changes in a nanosecond, making some strategies and tactics nearly obsolete almost as the words describing them are written. Nevertheless, the underlying ideas and concepts described here will remain relevant and the resources listed in the report will stand as sources for finding new, perhaps not yet imagined, tools to combine online and offline advocacy strategies. The PolicyLink website (www.policylink.org) is one such resource where visitors will find updates on campaigns described in this document and brand new ones offered in the spirit of Lifting Up What Works, the tagline that is the PolicyLink promise to demonstrate the power and the possibility of advocacy for policy change.

Angela Glover Blackwell
Founder and CEO
PolicyLink

Judith Bell
President
PolicyLink

Tessie Guillermo
President and CEO
Community Technology Foundation of California

Introduction

For more than a decade, the Internet has helped to gradually reshape the American political environment: impacting the way political and advocacy organizations mobilize constituents; influencing how they advocate for issues, support political candidates, and engage individuals in the political and policymaking process. Altogether, these changes reflect broader shifts in how advocacy campaigns are conducted. The more traditional advocacy tools of research, building coalitions, lobbying decision makers, reaching out to the media, and organizing grassroots support are being augmented with an arsenal of new technology tools. Innovative online strategies are broadening the dissemination of information and mobilizing supporters to advocate for change. This new approach to advocacy—e-advocacy (electronic advocacy)—presents organizations and coalitions with heightened opportunities to affect public policymaking, administrative procedures, and corporate policies.

This new Internet-friendly environment offers a seedbed of opportunities for advocacy organizations to enable supporters to engage in various forms of Internet activism on behalf of advocacy campaigns. These organizations are rapidly growing the reach of their online audience through "viral marketing"—a tactic in which individuals spread advocacy messages via email to their friends and colleagues; they are utilizing compelling, visual narratives in short animation pieces that inform and persuade individuals to learn more about advocacy campaigns and to get involved; they are building communities of engaged online activists who participate in a host of offline events—house parties, rallies, and marches; they are providing technology tools to enable individuals to engage in "peer-to-peer" organizing by recruiting their friends and colleagues into personal or team "mini-campaigns" in support of larger advocacy efforts; and they are engaging in online fundraising activities.[1] In all, organizations are finding many new ways to amplify the voice and enhance the connectedness of people and engage them in effecting change.

E-Advocacy: Lessons from MoveOn.org Political Action

A much-touted success story in the new era of Internet-based advocacy, MoveOn.org illustrated during the 2004 presidential campaign that the Internet could be used as an effective vehicle for political mobilization, civic engagement, and fundraising for political candidates. Although MoveOn.org was founded in 1998 to educate the public and to advocate on issues of national concern, the MoveOn.org Political Action Committee—one of the largest political action committees (PACs) in the country—received widespread media attention during the 2003–2004 presidential election. It sent emails to its members—approximately 1.4 million—asking them to participate in an online Democratic presidential primary. The candidate with the majority of member votes would receive endorsement by the MoveOn.org PAC. That candidate was former Vermont governor Howard Dean.

Utilizing the capabilities of Meetup.com, a company that allows groups to "meet up" around like interests, the MoveOn.org PAC encouraged its constituents to mobilize offline around issues pertaining to the election and to Dean's candidacy for President. Supporters were encouraged to donate small sums of money, less than $5,000, to those candidates who demonstrated progressive agendas. Through 2004, the MoveOn.org PAC raised approximately $11 million for 81 candidates from more than 300,000 donors.[2]

Candidates' Electoral Strategies: Organizing and Fundraising

In addition to the support from the MoveOn.org PAC, Dean's campaign also utilized the Internet with great success. It used email to build an Internet audience and to mobilize constituents. It amassed over $20 million in small online donations, comprising an astounding 40 percent of its fundraising total. Similarly, the Kerry campaign was able to raise $82 million of its campaign funds online, fully one-third of total funds raised.[3] In 2004, the power of the Internet for marshaling huge amounts of small donations signaled nothing short of a seismic shift in political fundraising.[4]

Political candidates also used the Internet to foster meetups. By the end of 2003, the Dean group on Meetup.com had 140,000 members who scheduled more than 800 meetings for December of that year alone.[5] Rivaling Dean's Meetup success, the Bush-Cheney campaign used the web to organize nationwide "parties for the president." By July 2004, over 17,000 parties had been held.[6] As one observer noted, "The presidential campaign of 2003–2004 was the first real Internet election in the United States . . . from the earliest stages of the extraordinary primary campaign of 2003 through election day in November 2004, the Internet was often central to mainstream U.S. politics in a way that had been almost unimaginable before then."[7]

Individual Civic Participation: Speaking Out, Meeting Up, and Donating

Individuals who turned out in record numbers during the 2004 election—the highest voter turnout since the 1968 presidential election—also found many new Internet-mediated avenues for political participation outside of traditional electoral or party channels.[8] Traditional vehicles of civic engagement, such as volunteering for political parties and voting, were augmented by new paths to political participation. Individuals were invited to participate in email campaigns supporting a wide variety of policy proposals; they organized "meetup" groups through the Internet to plan and participate in political gatherings that took place in cities nationwide[9]; and they created blogs—personal, journal-like online publications—that shared insights on political developments, commented on political media coverage, and in some cases, broke major news stories.[10] Furthermore, as many as 13 million Internet users read political discussion boards, signed petitions, or donated money online.[11]

In fact, online donations were a vital form of participation by individuals in the 2004 election with small donations having a remarkable impact on the amount of money campaigns raised. Notably, almost one-quarter of small donors and 15 percent of donors who gave $500 or more online were first-time donors to political campaigns.[12] Moreover, more than 80 percent of donors between the ages of 18 and 34 contributed online. This development, as some observers suggest, demonstrates that collecting online donations will be central to the future of campaign fundraising. Illustrating the important linkage between offline and online participation in the 2004 election, a large share of online donors and first-time donors to campaigns were motivated to contribute after attending house parties or Meetup.com events that were organized online.[13]

Redefining the Digital Divide: Implications for E-Advocacy

After more than a decade of progress, a digital divide persists along racial lines, between higher-educated and less-educated individuals, and between higher-income and lower-income households. In 2006, white non-Hispanic adults are 20 percent more likely than African-Americans to use the Internet. Those with a college degree are 42 percent more likely to use the Internet than those with only a high school diploma, and households who earn more than $50,000 a year are 63 percent more likely to be Internet users than households earning less than $30,000 a year.[14]

Despite the persistent gap in Internet access between underrepresented groups and others, it is important to emphasize that racial minorities, the poor, and the less-educated are indeed online. In fact, they are online in large numbers. In early 2006, 61 percent of African-Americans and 76 percent of English-speaking Hispanics were online. In addition, more than half of the households with annual incomes of less than $30,000 a year used the Internet as well as 64 percent of those with only a high school diploma.[15]

Importantly, however, being online or offline are no longer the definitive aspects of the "digital divide." The contemporary divide is centered on issues of bandwidth, usage, and content. One sign with promising implications for the future of e-advocacy and underserved communities is the increasing access to and use of high-speed Internet connections by people of color. As of March 2006, 42 percent of all American adults had broadband Internet connections at home. This is an increase of 40 percent compared to March 2005. For communities of color, the rate of broadband adoption is actually much faster than for the population as a whole. From March 2005 to March 2006, the rates of growth in home broadband Internet connections for African-Americans and English-speaking Hispanics grew faster than the rate for whites. The percentage of African-American adults with broadband Internet access at home grew by an astounding 121 percent in just one year, increasing from 14 to 31 percent. For Hispanics who speak English, those with broadband Internet connections at home rose from 28 to 41 percent, reaching near parity with whites at 42 percent.[16]

Broadband access at home is notable among traditionally underserved communities because higher Internet access speeds tend to change the behavior of online users. In particular, on any given day a broadband user takes part in seven different online activities compared to just three for dial-up users.[17] And, contrary to past trends, broadband access is now a stronger predictor of intensity of Internet use than the number of years an Internet user has been online.[18] Important from an advocacy standpoint, broadband Internet users are more likely to engage in activities such as searching for political information or producing and sharing content online. Internet users with broadband at home are more than two-and-a-half times as likely to look for political information on the web than dial-up users. And broadband users are more than three-and-a-half times as likely to create content and share it online compared to dial-up users.[19]

Integrated Advocacy Strategies: An Optimal Approach for Making Change

Although there is a significant presence of underserved communities on the Internet, there are others who are not yet online. This suggests that advocacy organizations must adopt integrated approaches that exploit the power of the online world along with the enduring strengths of traditional offline strategies.

Even with the potentially revolutionary implications of the Internet for civic engagement

and advocacy, the fact remains that traditional offline strategies will remain indispensable for advocacy campaigns well into the future.

As illustrated in this report, mobilizing action using the Internet is merely one part of the larger organizing strategy, not something separate and independent. Successful online organizing efforts are planned deliberately as part of a comprehensive field strategy. Whatever online tactics are pursued, their effectiveness depends in large part on how they are reinforced offline. There is no silver bullet or magic combination of Internet technologies that can turn a strategically moribund advocacy campaign into a success. A well-crafted overall strategy will always remain the essential ingredient for achieving change.

A clear message emerged out of the 2003–2004 presidential election cycle and continues to resonate today: technology tools combined with sound online and offline strategies are no longer a luxury for influencing the political process and supporting change. They are invaluable assets for meeting campaign goals and strengthening an organization's capacity for advocacy.

Roadmap to the Report

This report offers beneficial information for organizations with varying levels of technology expertise and is designed to be as user-friendly as possible. The report is divided into five main sections:

Section One, "From Concept to Practice: Defining E-Advocacy," outlines different types of advocacy, and highlights the benefits of integrating technology tools into campaigns.

Section Two, "E-Advocacy Campaigns: Audiences and Tactics," looks at online and offline tactics used to engage supporters and influence decision makers. The case studies provided in this section illustrate how two coalition campaigns used different combinations of online and offline tactics to effectively reach their respective audiences.

Section Three, "Technology Tools: What They Are, What They Do, Where to Get Them," provides a rich list of technology tools, their functionalities, tips for using them effectively, and the technology vendors that offer them. The case studies in this section illustrate how one advocacy campaign helped supporters organize themselves to raise funds for an effort, while another effectively used the Internet to "narrowcast" advocacy messages and "track" how they were received by targeted groups of supporters.

Section Four, "Integrating Technology Tools into the Organization," identifies key issues and strategies for incorporating e-advocacy into the fabric of organizations. It highlights the organizational adjustments that must accompany the incorporation of technology tools into advocacy work and offers a case study that shows how one organization adapted its structure and work processes to become better suited for e-advocacy.

Section Five, "Concluding Thoughts," offers key lessons for organizations seeking to use electronic approaches in their advocacy strategies.

Research Methodology

To develop the lessons and insights conveyed in this report, PolicyLink conducted an extensive literature scan to identify documented studies and handbooks on e-advocacy best practices; interviewed many practitioners in the nonprofit field, including technology developers, consultants, vendors, and online campaign strategists; and conducted in-depth interviews with the staff of 13 advocacy organizations or campaigns currently using e-advocacy to advance social justice issues and to address the needs of historically underserved communities. The organizations interviewed for this report range from very small organizing groups to large coalition campaigns with significant resources to allocate to online strategies. They are identified more fully in the Appendix, "Organizations and Campaigns Interviewed."

1 From Concept to Practice: Defining E-Advocacy

What Is Advocacy?

Advocacy is the individual and collective pursuit of change in ways that directly affect people's lives and opportunities. While often used to describe *policy change*,[20] advocacy can also involve efforts to influence the actions of institutions, corporations, and organizations in ways that benefit a collective social interest. As a practical matter, advocacy involves identifying an issue, drawing attention to it, and working towards an outcome.

Advocacy campaigns can be either sprints or marathons, involving decisive action within the finite span of a ballot initiative campaign or, perhaps, years of effort employing a broad array of tactics within an evolving strategy. Advocacy is sometimes performed by organizations on behalf of others and at other times involves grassroots organizations engaging citizens to act, civically or politically, on their own behalf. For example, organizations that have large memberships will often advocate on behalf of their members, just as grassroots organizations advocate on behalf of their constituents. Additionally, there are organizations—with no members—that develop partnerships with other organizations to advocate on behalf of the latter's constituents.

Public and private policymakers often interact with constituent leaders and interest groups before finalizing policy decisions. The policymaking process is conducted on the inside by federal, state, and local legislative, executive, and judicial branches. The outside perspective involves formal and informal institutional interests, with constituent interests represented by professional lobbyists, issue-focused coalitions, public-interest advocacy organizations, think tanks, grassroots community networks, and other organizations all trying to influence the outcomes of the policymaking process. Individual leaders, faith-based, community-based, or those representing some affected group (e.g. Mothers Against Drunk Drivers) are also important actors bringing the outside "real-world" perspective and voice to the policymaking process. Outside efforts can involve public education, organizing, media, marches and protests, or other activities to increase the pressure for policy change.

The Advocacy Process

Several activities can serve as entry points into the policymaking process. Effective engagement, however, requires understanding how the process works, how to leverage participation for greater impact, and how to translate that understanding and participation into policy change.

The advocacy process generally involves:

- Identifying problems that require a policy change or intervention.
- Establishing principles to guide a proposed remedy.
- Understanding the related issues and clarifying the policy needed to address those issues.

- Developing a policy strategy with related data and required resources.
- Building coalitions and gaining power to win the policy change or intervention sought.

Types of Advocacy

The goals and desired outcomes of a campaign will determine its advocacy target:

- **Legislative:** lobbying legislators at the local, state, and federal levels; can include proposing, endorsing, or opposing legislation as well as providing information to legislators and testifying during legislative hearings.
- **Judicial:** filing lawsuits to change policy.
- **Electoral:** ballot initiatives, voter education, and get-out-the-vote drives.

Campaigns for reaching the targets will include one or all of the following strategies:

- **Research and Public Education:** disseminating information and research data to highlight the importance of a policy issue and to develop support for proposed solutions.
- **Administrative and Program Monitoring:** focusing on the implementation phase of the policy process when rules and regulations are established and the bureaucratic process is developed. This can also involve reviewing an existing program to determine whether constituencies are being properly served or goals adequately met.
- **Media and Public Engagement:** cultivating relationships with journalists, writing news releases, submitting opinion pieces and letters to the editor, and appearing on television and radio to help shape public opinion and build public will around a policy issue. Media efforts include outreach to ethnic and alternative media as well as new venues such as online publications, blogs, and electronic newsletters targeting campaign constituencies. Media and public engagement aim to educate the public and policymakers and to frame the issues to support policy change.

These types of advocacy strategies provide a range of activities to use in reaching goals and influencing policy. The advocacy plan an organization or coalition develops over the course of a campaign can involve action in just one of these areas or a combination of them.

Figure 1.

WORKING ON THE INSIDE AND THE OUTSIDE

INSIDE

- Meeting with Legislators
- Providing Information to Legislative Offices
- Testifying in Committees
- Negotiating with Policymakers and Lobbyists

OUTSIDE

- Media Advocacy
- Coalition-Building
- Letter Writing
- Organizing and Grassroots Activities (e.g. Rallies, House Parties)
- Research and Analysis
- Electronic Advocacy

What Is E-Advocacy?

E-advocacy has the same targets as those listed above but emphasizes the use of an array of technology tools—tailored to an organization's specific campaign goals—to increase support and pressure for policy change. As a complement to traditional strategies, e-advocacy expands the possibilities for framing policy problems for a wide audience; facilitating audience engagement around policy solutions and building a base of online support; promoting interaction among advocacy supporters; mobilizing supporters to take action on behalf of a campaign, including lobbying public officials; influencing the media to help shape public opinion; and, in sum, increasing pressure to make change happen.

Online strategies provides a number of important advantages for advocacy campaigns.

- **Reduced cost and increased speed and efficiency**

  When resources are limited, Internet communications can, in many instances, substitute for more costly traditional alternatives. A well-conducted email campaign, for example, can replace the need for paper, envelopes, and postage, along with the staff or volunteer time needed to prepare and send letters to policymakers. The speed and efficiency with which email communications can be used to mobilize supporters to take action is unrivaled by other communications methods.

- **The ability to reach a wider audience with more opportunities to gather support**

  Utilizing various technology tools, such as a website or bulk email lists, allows organizations to contact their audiences with targeted messages to build and strengthen their supporter base. When potential supporters are not directly connected with an advocacy campaign, they can be reached by receiving an email message forwarded to them by a friend or colleague. This form of "viral marketing" allows campaigns to grow a dispersed but connected base of supporters they might not otherwise reach with offline approaches alone.

- **An interactive way for potential supporters to learn about a campaign, 24 hours a day, and find answers to their questions**

  A designated campaign website, on its own or on an organization's website, allows audiences to gather information and get answers to questions quickly and easily at the viewers convenience. It is equally a way for organizations to garner new supporters and entice their participation in the campaign. Technology tools allow potential supporters to sign up for information updates and make it possible for the host organization to collect email addresses and build email lists.

- **The means to target communications with content that is specific to supporter concerns, monitor supporter feedback, and track online activity to identify strong supporters**

  Monitoring the number of times a campaign website is visited and the actions taken by its visitors is an efficient means for organizations to track the effectiveness of their online messages and content. Moreover, the actions of email recipients can be monitored after they respond to an email "call to action." It allows the campaign to view the email recipients' actions and gauge the level of involvement with the campaign. This invaluable capability to track how audiences are interacting with a campaign's advocacy messages sets online advocacy apart from traditional offline approaches.

The ability to circulate breaking news and invite supporters to shape the political discourse

Keeping supporters informed of breaking news and developments is central to an advocacy campaign. The power of email is unmatched for turning around a quick response to breaking news and developments. Organizations can quickly update information about a campaign and provide supporters with information to use in response to calls to action. Having a blog, permits bloggers to post information immediately and encourages audiences/supporters to participate in shaping the discourse around an advocacy issue.

An online presence for converting media buzz into opportunities for participation and increased support

After seeing a news story or hearing about a campaign issue, audiences who want to know more about a campaign can visit an organization's website. A well-organized website with engaging content can turn passive viewers into active supporters and can even convince them to recruit friends to join the campaign. In this way, an advocacy website serves both to deepen awareness as well as to create avenues for participation that other types of media cannot match.

Tools that enable supporters to organize themselves

Perhaps the most compelling characteristic of the Internet for advocacy is how it supports the ability of individuals to form their own networks on behalf of an advocacy campaign. The stunning success of "meetup" groups that formed around the candidacy of Howard Dean for the 2004 Democratic presidential nomination demonstrated the power of Internet tools for enabling supporters to organize themselves. In fact, several organizations have begun experimenting with creating Internet platforms to promote "peer-to-peer" organizing. By equipping supporters with the tools to recruit, organize, and help others to take action on behalf of an advocacy campaign, the potential for mass mobilization increases considerably.

Tools that permit various advocacy organizations to conduct online fundraising

The Internet offers vast capabilities to conduct fundraising in support of political and advocacy campaigns. Whether the actual fundraising transaction takes place online or whether supporters send checks via postal mail, the impact of the Internet to reach untapped audiences increases the potential to raise substantial amounts of money.

2 E-Advocacy Campaigns: Audiences and Tactics

The success of an advocacy campaign—whether using offline or online tactics or a combination of both—is determined by an organization's ability to influence decision makers. A successful campaign typically requires:

- Contacting audiences and building awareness around an issue;
- Disseminating information to build support;
- Engaging constituents to take action on behalf of a campaign;
- Getting constituents to recruit other supporters;
- Sparking media attention; and
- Generating adequate resources to run the campaign.

Tactics for Building Support

Whatever the level of engagement advocates seek, there are a variety of tactics that can be applied to build a base of support. These include both traditional offline as well as Internet-supported (online) approaches that are mixed and matched, depending on the needs and circumstances of a campaign.

Offline

- Hand-distributing flyers
- Hosting house parties
- Phone-banking
- Canvassing
- Tabling
- Contacting media via postal letters
- Advertising in print media outlets
- Printing publications

Online

- Building a website
- Sending emails
- Virtual phone-banking
- Peer-to-peer organizing[21]
- Forwarding online video or animations
- Sending letters to the editor
- Blogging and discussion groups
- Online advertising

In weighing both online and offline options, the key is to choose the tactics that are best aligned with the overall strategy at each point of a campaign. The type and number of tactics that a campaign uses depend on:

- **The time frame or length of a campaign:** The longer an advocacy campaign, the greater the opportunity to employ a multitude of tools, both online and offline, to build a relationship with potential campaign supporters.
- **Maturity of the issue:** An issue that is newer to the public agenda may require a focus on increasing awareness by framing the problem and highlighting the need for action, rather than making immediate calls for action.
- **Resources of the campaign or organization:** The ability to engage supporters online requires resources to cover the cost of purchasing technology tools and the staffing required to use them effectively. However, the range of technology options available can make an effective online advocacy approach viable for almost any organization. In many instances, an online strategy may be the only initial option for organizations without the resources to pursue more traditional offline approaches.
- **Receptiveness and location of supporters and advocacy targets:** Organizers must know their audiences for the campaign to be truly productive. If the supporter base is not a group that uses the Internet and the aim of the campaign is to grow its supporter base, it would be more advantageous to focus on traditional offline advocacy strategies. The decision about which online and offline tactics to use will be driven by the characteristics of the audience.

Tactics for Influencing Decision Makers

The overall goal of an advocacy campaign is to influence decision makers—policymakers or corporate leaders—to pass or defeat a proposed change. It involves mobilizing supporters to either communicate directly with policymakers or indirectly by contacting the media or staging public protests. As one set of options, e-advocacy provides ways to generate visibility, facilitate a range of grassroots online activism, and coordinate and reinforce a host of offline activities. Coordinating online and offline tactics is perhaps the most essential ingredient to the effectiveness of advocacy strategies.

There are many different tactics that advocates can adopt to take action directly or to help their supporters apply pressure for change. Decision makers face ever-increasing amounts of communication designed to influence them. To be effective in this crowded environment, advocacy campaigns must frame messages in a compelling manner and target their efforts using multiple tactics to reach key decision makers. Organizations usually use the tactic(s) listed below individually or in combination with each other.

Offline

- Visiting in person
- Sending postal letters
- Initiating contact by community, interest group, and constituency leaders
- Sending faxes
- Making phone calls
- Organizing rallies
- Organizing protests
- Contacting media (news releases, news conferences, editorial visits, opinion pieces, letters to the editor, etc.)

CASE STUDY

Virtual Phone-Banking:

The Sierra Club's Online Tactic to Reach Supporters in Presidential Swing States

During the 2004 presidential election, the Sierra Club channeled its energy into an effort to educate voters in swing states about the environmental records of George Bush and John Kerry. Because volunteers were distributed across the country, the key challenge for the campaign was determining how to effectively mobilize its activist base to raise awareness in swing states. The organization decided that the best approach was to organize a virtual phone bank that allowed volunteer callers to be located anywhere in the country. The Sierra Club partnered with Grassroots Enterprise, a technology vendor,[22] to help volunteers, spread across various parts of the country, to contact thousands of voters in swing states during the last few weeks before the election. Supporters logged onto the Sierra Club website where they downloaded scripts as well as call sheets containing contact information for targeted infrequent environmental voters. The talking points included in the scripts were tailored to a particular voter's locale. For example, targeted voters who lived in Toledo, Ohio, heard information that referenced how the records of Bush and Kerry impacted local environmental issues. Providing this targeted information to a nationally distributed set of volunteer callers would have been extremely impractical without the use of the Internet. Volunteers completed calls from their own homes and, in many cases, at "phone-bank parties" organized by supporters who lived near each other. After completing their outreach calls, supporters entered information on the Sierra Club's website that described successful calls as well as debriefed the campaign on issues and challenges that emerged. Supporters were also encouraged to share their experiences with other phone bank supporters via a blog, which permitted an interactive way to help build an activist community.

Online

- Electronic letter-writing
- Online faxing
- Internet-organized constituent phone calls
- Internet-organized constituent "lobby days"

Although organizations utilize several different offline and online tactics to influence decision makers, what is most effective depends in part on the receptiveness of advocacy targets to different types of communication. A study conducted by the Congressional Management Foundation found that not all tactics for reaching out to legislators carry the same weight and that Internet communications, while easier to accomplish than other approaches, do not necessarily mean less impact. When legislative staffers were asked to rank the impact of different communication methods on the decision making of congressional members, they clearly indicated, as shown in Table 1,

that online and offline communications—particularly individualized emails or letters—do indeed have influence.

The study confirmed a principle that the receipt of 50 thoughtful email messages written in constituents' own words would be more effective than 300 identical form messages, even if delivered via postal mail. Moreover, congressional staff overwhelmingly felt that large numbers of email messages, which are easier to organize and respond to, are preferable to an unwieldy onslaught of faxes that are difficult to respond to and consume costly office supplies.

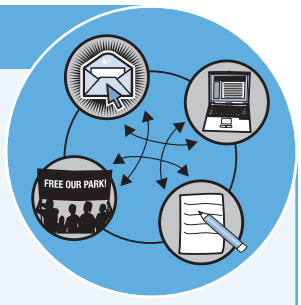
A key message of this study is that a mix of online and offline approaches, which are both targeted and strategic, provide a more robust approach to advocacy than a single approach. The key is to balance activities in the online and offline worlds that reinforce the campaign's core strategy.

The following case study illustrates how, in a highly strategic way, a group of activists successfully coordinated online and offline tactics to build a base of support and pressure a diverse array of decision makers for change.

➤ TABLE 1. Influence on Members' Decision Making[23]

Method of Contact	Would Have a Lot of Influence	Would Have No Influence at All
In-person visits from constituents	60%	1%
Individualized Postal Letters	44%	4%
Contact from a person who represents many constituents	47%	4%
Individualized Email Messages	34%	6%
Visit from a Lobbyist	15%	7%
Individualized Faxes	30%	9%
Phone Calls	20%	12%
Form Postal Letters	3%	35%
Form Email Messages	3%	37%
Form Faxes	3%	43%

CASE STUDY



Interweaving Online and Offline Tactics:

Free the Schuylkill River Park Campaign

Since 2004, a group of local activists have been leading a campaign to create easier access to the Schuylkill River Park in central Philadelphia. The campaign's main target, CSX, is a private rail freight company that the campaign maintains is regularly parking its freight trains on tracks that block local residents from accessing the park and its upgraded facilities. The campaign began as an ad hoc committee of the Logan Square Neighborhood Association and was eventually expanded into a coalition with other neighborhood associations as well as community organizations from across the city.

From the beginning, the campaign saw resident engagement and mobilization as central to its advocacy strategy. Because of limited initial resources, it relied heavily on the use of the Internet to build and nurture an online community of supporters—mostly residents living near the Schuylkill River Park—who could help the campaign exert pressure on the company. In addition to being used to pressure CSX directly, the Internet was also utilized to help secure the support of an array of key actors—the local parks commission, city council members, the Mayor, U.S. Senators from Pennsylvania, and local media—to apply additional pressure.

Tabling in the park to build support

The campaign began with a list of approximately 50 to 60 email addresses. Seeking to build this list of campaign supporters, the organizers set up a table in the Schuylkill River Park, attempting to gather new email addresses where potential supporters were most likely to be. Within weeks the campaign had collected more than 150 signatures and email addresses.

To launch a communications outreach strategy on a limited budget that would get even more community residents involved, the campaign began with a free "electronic letter-writing" tool known as Citizenspeak[24] and an online faxing service.[25] The electronic letter-writing (email) system used by the campaign provided a convenient way for local residents to take action in support of the effort and to express their views. They were able to tailor scripted campaign statements to reflect personal experiences and concerns that were then transmitted via email and fax to a variety of advocacy targets. Once having taken action, these online activists could then forward emails to friends and colleagues, inviting them to send an email and fax in support of the campaign. This would allow email messages to become "virally"

Free the Schuylkill River Park Rally

disseminated across the community and, as a result, help the campaign to grow an organic base of committed supporters from 200 people to more than 750 online supporters. These emails were also tracked[26] to determine the number of people sending letters to decision makers, the total number of emails sent, and the zip codes of where those constituents lived.

As a result of its email-writing campaign, supporters gained substantial visibility that proved helpful in generating local media coverage. When a reporter from the Philadelphia Inquirer contacted the campaign to write a story, the reporter wanted the perspective of an actual park user. The Internet strategy team reviewed the many emails submitted by constituents to find one that was particularly passionate about the issue. The story appeared on the front page of the newspaper's local news section.

Following the local media coverage, the campaign created a website to post the newspaper article, along with photos and other campaign information. A blog was also created to keep residents informed.

After the campaign supporter list had grown substantially, the organizers began using a "mass emailing" software service.[27] It allowed the organizers to send HTML[28] emails to supporters, to monitor the number of people who opened the emails, and to determine whether the emails were forwarded to others. This insight precipitated the decision to hold a campaign rally. To document the offline event, the resulting television coverage of the rally was made accessible through a link from the campaign's main website. Perhaps the most innovative feature of the campaign website involved the use of streaming video feeds available 24 hours a day, showing whether the CSX trains were blocking street entrances to the Schuylkill River Park. Through this feature, residents had relevant information to submit a complaint—in the form of an email sent directly from the website—to CSX.

The use of tabling in the park to jumpstart the viral message dissemination, the surveying of emails from constituents to find a personalized community voice to speak for the campaign, the tracking and monitoring of emails providing insight on rally opportunities, and using tabling and rally opportunities to increase website traffic all demonstrate how the campaign was able to effectively integrate its offline and online tactics.

The Free the Schuylkill River Park campaign has not only garnered substantial political support, including a city council resolution backing the campaign, but it has also forced CSX to a last-resort option of going into federal district court. As the ongoing battle to secure easier access to the Schuylkill River Park moves forward, the campaign's engaged supporter base is poised to be the community voice on other park issues well into the future.

3 Technology Tools: What They Are, What They Do, Where to Get Them

A core set of technology tools are at the heart of successful e-advocacy campaigns. These include databases for storing contact information and data about audiences and supporters; websites and content management systems for presenting information and updating it on a regular basis; email tools for conducting outreach communications to online audiences; and a variety of supplementary technology tools that facilitate different ways of engaging supporters to put pressure on decision makers.

This section describes each of these technology components:

- **Website:** Provides suggestions for content sections on an advocacy website and tools to create an effective online presence.
- **Email:** Gives pointers for contacting audiences through email newsletters and action alerts and for designing email messages.
- **Creating Engaging Content for a Website:** Describes blogs, online video and Flash™ animation, and podcasting.
- **Tools to Connect to Audiences and Enable Supporter Action:** Details the many technology tools that are used to inform supporters and mobilize action.
- **Technology Tools and Strategic Service Providers:** Describes various industry providers of technology tools and services and highlights some of their key differences.

Creating the Virtual Headquarters

Every campaign has a website as its central online presence. It may also feature a blog, online video/Flash animation pieces, or audio podcasts. Whatever is featured, an online presence is a 24-hours-a-day place for visitors to get an array of information about an advocacy campaign. Whether they find it through a search engine,[29] by clicking a link in a webpage, or by keying in the domain name,[30] visitors come to the virtual headquarters of the campaign to better understand its issues and, perhaps, learn how to get involved.

The best advocacy websites are those that reflect a clear understanding of their goals and their audiences. They must present content that addresses multiple audiences—constituents, supporters, policymakers, decision makers, the media, and funders—and provides clear navigation aids so all of these audiences can find what they are looking for. If the site's central focus is to encourage action, then that functionality should be prominently displayed on the home page and reinforced throughout the site.

Creating the Campaign Website

Websites can serve multiple functions: provide background information about the organization or coalition and its campaign issues, create a venue for recruiting volunteers, facilitate online action, solicit contributions, and allow supporters and interested site

visitors to connect with each other. A website must give people enough information to make them knowledgeable about the issue, help them gain an understanding of what the campaign is trying to accomplish, and spell out ways in which they can participate and lend their support.

There are a number of important content sections that advocacy organizations may wish to include in their sites to meet the informational needs of their multiple audiences. Figure 2 suggests primary website content sections.

Selecting the Virtual Address and Driving Traffic to It

Perhaps the single-most important maxim to website promotion is that a campaign's website address can never be visible in too many places. As noted in the introduction to this section, there are only a limited number of ways in which visitors will find their way to the website: they will key the web address (e.g., www.policylink.org) directly into a browser; they will find the web address through a search engine; they will click on a link to the campaign site from another website; or they will click through on a link to the site placed in an email message. All four of these paths to a campaign's website must be considered as part of outreach and promotion activities.

After an organization or coalition has created a website, there are many ways to publicize it:

- Announcing the launch or redesign of the website; sending an email out to the list of supporters; having them forward the email to a friend.
- Publicizing the website as often as possible by putting the address on all communications: brochures, newsletters, action alerts, news releases, flyers, publications, letterhead, business cards, and the signature line of emails.

Figure 2.

Main Content Sections for an Advocacy Website

Home Page: provides navigational aids for the site as a whole as well as prominent placement for links to the "Take Action" page, "Donations" page, and sign-up forms to receive updates and calls to action.

About Us: describes the organization or the campaign and its objectives. "About" pages usually provide a brief history and an overview of what the organization or campaign is about.

Contact Us: includes a physical address, phone number(s), and email addresses for the organization or campaign.

Take Action Page: contains the tools that enable supporters to take action. These tools, for example, support sending emails or faxes to advocacy targets or signing online petitions.

Online Press Room: contains news releases or complete press kits with campaign or organizational contact information.

Media Coverage Page: features links to online sources of media coverage for the campaign and its issues.

Endorsement Page: includes a list of organizations that endorse the campaign, with links to their websites.

Calendar or Schedule of Events Page: provides a schedule of organizational or campaign events, perhaps with a form that users can fill out to RSVP.

Donations Page: allows donors to contribute to the campaign.

- Asking coalition members and other organizations working on similar issues to include a link to the campaign website on their website.

Do not go overboard. Build a quality website, but do not include so many bells and whistles that the site is confusing, visually distracting, or so large in size that potential supporters—who may have low levels of technology proficiency—have trouble viewing or navigating the site.

Keep it fresh. People expect to see new content when they come back to a website; it is the nature of the Internet. If someone visits a website three or four times over a few months and nothing has changed, that visitor is unlikely to return.

Creating Engaging Content for the Website

Use existing content

One of the easiest ways to populate a campaign website with engaging content is to post material the campaign produces and maintains in print form in a format and style suitable for the web. This can include fact sheets, issue briefs, and research articles. In addition, websites often feature content available elsewhere on the web, such as links to reports and articles. These links should be prefaced with commentary that shows how the linked information supports and gives credibility to the campaign's goals.

Photography

In addition to written text, it is worthwhile to explore visually communicating advocacy messages and campaign activities on the site. Photos visualize the issue, move people emotionally, and encourage them to act. Photos can also visually capture the accomplishments of a campaign such as major rallies and news conferences.

Blogs

Blogs, short for "weblogs," are increasingly used by individuals and organizations to frequently publish content on the web. They offer a new genre of online communication with a more engaging and conversational tone. Free or fairly inexpensive[31] browser-based blogging software makes it easy for advocacy groups to post breaking news related to their issues that also welcomes additional comments from readers. Individual blog entries are usually in chronological order, with the most recent post listed at the top of the page. Since blogs are intended to engage an audience of regular readers, they are most effective when they are conversational, can be easily read, are timely, and support syndication.

- **Conversational Tone:** An important characteristic of blogging, which defines its appeal as a new vehicle for communicating with audiences, is its conversational and informal tone. Blog posts are best when they are thoughtful, provocative, and concise.
- **Readability:** A key technique for creating easily readable blog postings is to feature descriptive and engaging titles and one or two short introductory paragraphs to draw readers in. Those seeking to read further should be provided a link to a longer version of the posting.
- **Timeliness:** The universe of millions of interlinked blogs on the web, the so-called "blogosphere," is a fast-paced environment that moves in step with the 24-hour news cycle. Writing about a breaking news development, therefore, requires quick turnaround to capitalize effectively on increases in blog traffic.

- **Syndication:** A campaign should ensure that the blog software service it uses supports syndication in the form of RSS (Really Simple Syndication) feeds.[32] Syndication allows regular blog readers, using a software tool called an "aggregator," to stay updated with blog postings without having to visit the actual blog webpage.

Online Video/Flash Animation

Online video can be a powerful way to communicate the key messages of an advocacy campaign as well as to generate "viral" dissemination by prompting viewers to forward the video to others. An online video or Flash animation piece can be a significant asset for increasing the number of visitors to a campaign website.

Organizations with sufficient resources have often created short video or Flash pieces to help raise funds. Given their relative cost effectiveness compared to creating television ads, online videos can be a sound investment for helping to generate buzz and draw attention to a campaign. In fact, several advocacy campaigns, particularly statewide or national campaigns, have digitized video ads aired on television and placed them on the web where viewers are encouraged to make contributions to keep the video on the air. With permission, campaigns have also repurposed video produced by others, such as television coverage, by placing it on the web or providing a link to the news station's website. In addition, advocacy campaigns have developed video-documentaries of campaign activities such as speeches or rallies and later posted them to their websites.

When adding video content for whatever purpose, make sure that it is not so lengthy that it takes an exceedingly long time to download and view. Typically, video clips should be no more than two to four minutes and require only a minute or two to download. Pieces should be edited to be crisp, filled with information, and clearly communicate campaign messages. They should also be promoted heavily through email and prominently noted on the campaign home page with a link to where they can be viewed.

Podcasting

Podcasting is a new approach to disseminating audio content over the Internet that allows creating audio recordings of speeches, interviews, or news updates and distributing them to a broad audience. The term "podcasting" is a bit misleading because it suggests the use of an iPod or other portable digital audio (PDA) device. However, this is not the case. Despite its popularity, the term podcasting refers to the broadcast of audio content, or what would be more aptly called "audiocasting."[33] (One advantage of a podcast is the ability to download the content from a computer to a PDA or an iPod and listen to it "on the go.")

Podcasting is a distinct form of online media in that users subscribe to an ongoing or recurring podcast and are automatically notified of new podcasts through free downloadable software programs known as "feed aggregators."[34] Aggregators offer the means for listeners to stay updated about new audiocasts without having to visit the website. However, audio listeners do not have to have "aggregator" software to listen to audio podcasts. It is just as easy for a campaign to post an audiocast to its blog or website and notify constituents via email that a new one is available. The real value of podcasting is the ease and minimal investment[35] to set it up and begin broadcasting.

Figure 3.

Sending Action Alerts

Action alerts are emails that urge supporters to take a specific and an immediate action, such as writing a letter, making a call, or sending an email or fax to a public official. In sending out action alerts:

Have a clear and compelling subject line. With all the email people receive, it is important to make sure they take notice when urgent action is needed. Subject lines are perhaps the single-most important factor in whether an email message is opened or ends up in the recycle bin. An important rule of thumb is to make subject lines succinct, urgent, and avoid excessive punctuation or capitalization.

Create a recognizable "From" line. An awkward "From" address can discourage recipients from opening a message. Reply-to addresses should include institutional names such as actioncenter@thisorganization.org where possible.

Design the email message in HTML. HTML emails look like web pages and generally are more attractive than text emails. They have been shown to increase the likelihood that recipients will read an email and take the requested action. Moreover, they provide greater control over formatting and layout design so that requests for action can be clearly and prominently displayed in more flexible ways.

Personalize the message. Personalizing action alerts by including a recipient's first name in the greeting can help remind him or her that s/he has signed up to receive action alerts as well as generate a greater sense of familiarity than a form message.

Highlight the urgency of the alert and its intended goal. Highlight the urgency of the proposed action and its necessity within a specified time frame. Also articulate a goal for the campaign, such as number of emails sent or number of legislators contacted.

Keep the text short and focused. Design the alert text so that it can be easily scanned with bulleted points. Use accessible, clear language; no jargon. Ask for a specific, concrete action. If the alert is cumbersome or confusing, people will not take action.

Provide sufficient information. Include a brief background with a link to the website for more information. Give people talking points if they are asked to make phone calls or lobby.

Make it easy for people to respond. Include sample text for a letter, email, or fax. Provide contact information for the decision makers that people need to reach.

Include a deadline for action. Let people know the time frame in which to respond and when the time for action has passed.

Let people know how to contact the coalition or organization with questions. Since an alert may be forwarded to people who do not know the coalition or organization, include an address, phone number, and a link to the website.

Always encourage recipients to forward the message. Asking email recipients to forward the message on to others is an invaluable way to get more people involved. A "tell-a-friend" link should be included prominently in the body of the message.

Be sure to "close the loop." People who take action should receive an immediate email thanking them for their efforts. At the end of a particular email campaign, be sure to share with the entire email list what happened with the effort (e.g., how many emails were sent, legislators contacted, anecdotal stories of success), what role this particular email campaign plays in the larger advocacy strategy, and what the outlook for future calls to action will be.

Audio content must be compelling. Podcasted updates and alerts should be concise and informative. Longer audio pieces such as interviews and in-depth commentary should be prepared in a format similar to radio programming, including, perhaps, introductory music and a clear introduction to the content.

Using Email

Email is a fast and an inexpensive way to communicate with a large number of people at one time; it saves the time and expense of printing and postage. It can be used for one-on-one exchanges, group discussions, distributing information, and getting people involved. Figure 3 highlights one of the most effective types of e-mailing: action alerts.

Implementing email communications is a staff-intensive process that involves cultivating and maintaining a relationship with supporters. Email messages should be planned for, tested, and tied in with website content. To make the most of this tool:

- **Collect email addresses at every opportunity.** Add a "sign-up" box on every webpage and provide web forms and a way for supporters to email the campaign from the website. When using offline tactics, provide a sign-in sheet or membership form to capture email addresses. Start gathering the information right away, even if the organization is not ready to begin online communications.
- **Encourage supporters to get online**, especially those likely to respond to a call to action.
- **Plan and Test Email Communications.** Organizations should create a calendar for regular email communications. Typically the best time to send email newsletters and other less time-sensitive communications is Tuesday through Thursday mornings. For special events

FIGURE 4.

Sending Email Newsletters to Build Support

Email newsletters are an effective way of staying in touch with supporters, providing information and updates, and building momentum. They are cheaper than printed newsletters and are easily forwarded to others for wider circulation.

Be concise and consistent. Newsletters should be short and distributed with some regularity, whether quarterly, monthly, or weekly, depending on the organization's capacity and the phase of the campaign's advocacy effort. They should typically include no more than three to five news items with no more than two to four lines each. Announcements or news items requiring lengthier information should link to the website.

Make them interesting and easy to read. Headings are helpful in allowing people to scan a newsletter and focus on the parts they are most interested in. A table of contents can also help focus readers. Consider putting the content in the text of the email instead of an attached document. Photos are nice, but use them sparingly because they may be difficult for some people to download.

Use them to help build a supporter base. Include information in a newsletter about how to subscribe, so that those who receive it from someone else can sign up on their own.

Reinforce them with the website. Include the website address in newsletters for those who want more information. And post the most recent newsletter on the website. Also, if possible, post an archive of all previous newsletters.

such as rallies, convenings, or house parties, craft a plan for pre-event marketing using email and post-event email follow-up as well. Emails should be pre-tested prior to distribution to an entire email list. In particular, they should be checked for formatting, spelling errors, and broken links.

Email campaigns that issue a call to action are usually not just a single email blast, but a sequence of emails designed to encourage and energize activists before the call to action expires. As much as possible, plan in advance the sequence of messages created to help spur action. A possible message sequence could include:

1. Preparing and sending a call to action, outlining its goals and the time frame for supporters to take action.
2. Sending a follow-up "thank you" message to activists who complete the action requested. That follow-up message could also include a prominent request for supporters to forward the message to others.
3. Sending an email message updating supporters on the progress and sending out additional calls for more individuals to take action to help achieve the goal.
4. Sending an email to supporters informing them of the outcome of the campaign and the ways in which their efforts helped.

- **Manage Expectations and Cultivate Relationships.** Regular email communication is a relationship cultivation activity. The frequency of emails depends on how well the online campaign has built and managed the expectations of email recipients. Part of building expectations begins when recipients first add themselves to a list through a website or are added by the organization as a result of offline contact. Constituents should be made aware—either on the website when they add themselves or in an introductory email following offline contact—of how frequently (e.g., daily, monthly, or weekly) they can expect to receive email communications. Newsletter communications should typically reach recipients at a consistent time on a regular basis, usually monthly. Sending newsletters too frequently, or too infrequently, or on varying schedules, may clash with expectations and reduce the likelihood that recipients will open them. Also, if a campaign has created multiple types of newsletters, it should allow supporters to choose the types of emails they want to receive. The primary steps in generating newsletters to build support are outlined in Figure 4.
- **Be discreet with group email.** When using email clients such as Microsoft Outlook or Eudora, or web-based email such as Gmail or Hotmail, make sure you always put recipients' email addresses in the "bcc" line instead of "to" or "cc." Otherwise the email addresses will be visible to everyone on the list, enabling others to use the list. If that happens, people may become annoyed and ask to be removed.
- **Do not put anything in an email that should be private.** Emails can be forwarded in an instant, and the final destination of an email could be anywhere. It could wind up in the hands of the opposition!
- **Tie email with web content.** Not all of the most compelling content to be shared with supporters has to be included in the body of an email message. In fact, email strategies are most effective when they make use of content posted at an organization's website, particularly rich media content

such as online videos, Flash animation, or audio content.[36]

Tools to Connect to Audiences and Enable Supporter Action

Advocacy organizations can utilize a range of technology tools that serve different functional and strategic purposes. As part of an e-advocacy strategy, these tools can help organizations grow their base of support, keep their supporters regularly informed and updated, raise funds, manage and engage their members and volunteers, provide ways for supporters to take action in support of campaigns, and facilitate the ability of supporters to recruit and organize other supporters. Table 2 lists technology tools, along with brief descriptions of how they can be used to support advocacy campaigns.

TABLE 2. Technology Tools

Technology Tool	Description
Website content management systems	Sophisticated software tools for managing information posted to websites. Maintaining and updating website content can often prove onerous for organizations that lack the expertise or staff resources to update their website's HTML code on a regular basis. Content management systems allow organizations to easily add and update content with user-friendly templates that even nontechnical users can master. The system, moreover, provides organizations the ability to manage their overall body of web content as it grows over time.
Bulk Emailers	Unlike the simple email tools used in day-to-day communications (e.g., Microsoft Outlook, Eudora), these tools are designed for organizations to communicate with very large email lists. They are generally available as a monthly service and are provided by companies that rent bulk email tools to nonprofits over the Internet. Their prices vary, depending on the size of the email list and the number of emails sent per month. They typically cost a nominal fee to set up and involve monthly fees of between $20 and $100. Among an array of features, including the ability to design visually compelling graphic email messages, bulk emailers allow campaigns to monitor the effectiveness of their email campaigns. They can track whether email recipients are opening their emails (open rates), whether they are clicking through on links in the body of email messages (click-through rates), and whether they are forwarding email messages to others (forward rates). (For a full description of these email tracking features, see "Tracking Email Effectiveness" later in this section.) The array of features included in bulk emailers offers campaigns a powerful tool to conduct and track the effectiveness of their online communications.

	The top ten functionality features include: 1. user-friendly design templates for creating professional-looking emails, including the ability to upload images; 2. the ability to easily upload existing email lists in common formats such as Microsoft Excel; 3. reporting tools that allow organizations to track email "bounce" rates, "open" rates, "click-through" rates, and the number of "unsubscribes" from the email list; 4. the automated ability to "personalize" email messages to recipients by including their names or other identifying information in email messages; 5. the ability to segment email lists and target recipients based upon selected characteristics (e.g., geography, frequency of opening emails, and donors); 6. "tell-a-friend" functionality that supports the ability of email recipients to forward messages to friends and tracking tools for monitoring this behavior; 7. automated features for handling bounced emails, including their removal from future email blasts; 8. a "sniffer" that can detect whether email recipients can receive HTML email messages, and if not, substitute a text version of the email instead; 9. a web form that organizations can add to their websites to collect emails from site visitors. New email addresses should be automatically uploaded into the organization's email list stored on the provider's servers; 10. automatic unsubscribe handling that allows users to remove themselves from the organization's email list.
Donation Processing and Donor Tracking Tools	Tools allowing campaigns to accept donations through their websites. They typically provide for credit card and check processing as well as recurring automatic payments. They also often include features for tracking donor giving histories as well as other data about them.
Electronic "Letter-Writing" Tool	Asking constituents to send emails to supporters and decision makers is perhaps the most widely adopted approach for enabling advocacy supporters to take action online. Email-writing campaigns usually involve the creation of a form on a campaign's website where constituents can add their contact information and tailor a pre-written email message that will be sent to a policymaker. There are both free and proprietary "electronic letter-writing" tools. The more expensive systems offered by technology vendors use a constituent's zip code to automatically target the email message to the

	policymaker representing the district in which that constituent lives. Less sophisticated systems that are freely available over the Internet can often serve an organization's needs quite well (e.g., Citizenspeak, www.citizenspeak.org).
Online Tools to Organize Offline Gatherings	Some technology vendors offer tools that support the ability of a campaign's online supporters to organize offline gatherings where they can meet and discuss issues in person. A popular free online service available at Meetup.com was successfully used by supporters of the Howard Dean candidacy for the Democratic presidential primary in 2004. While free, Meetup.com is a proprietary service whose features cannot be controlled by an advocacy organization. Larger organizations or statewide advocacy campaigns wishing to support online organizing for offline events such as house party gatherings may seek a more customized system from an integrated toolset provider. Very often these tools include features comparable to those of Meetup.com or Evite.com.
Online Letters to the Editor	Organizations are increasingly providing ways for supporters to send letters to the editor directly from campaign websites. This tool is nearly identical to electronic letter-writing tools except that targets are usually the editorial staff at newspapers or other print media rather than policymakers. This tool involves providing a website form where visitors enter their contact information—name, email address, postal address, and phone number—and then are directed to a list of talking points, or a pre-written letter, that can be personalized by that supporter. Technology vendors can help organizations set up these tools on their websites.
Online Faxing	Similar to email tools, online faxing allows campaigns to offer supporters a means to communicate with their elected representatives via fax. These services typically involve the conversion of email messages sent by supporters into faxes that are transmitted to an elected official's fax number.
Online Petitions	Online petitions are one of the simplest ways that website visitors can take action. They allow visitors to sign on to a pre-written petition and to forward the petition to friends. They are a particularly effective way for an organization to grow its email list, through peer-to-peer "viral" message dissemination. Free online petition services are available on the web, but they usually have advertisements on the petition webpage. Organizations seeking more customized options that are housed on their own websites can build their own or acquire them from technology vendors.

Online Polling and Surveys	These tools can help gather opinions and information from and about supporters. A variety of tools are available to conduct online surveys that range in price from $20 a month with no start-up fees to several hundred dollars a month with significant start-up costs. Key features include: 1. easy-to-use design templates for creating professional-looking surveys as well as custom features for modifying the appearance of surveys to match an organization's website, including fonts, sizes, and colors; 2. the ability to add an organization's logo to a survey; 3. easy uploading of email lists for disseminating the survey; 4. the ability to create questions that let users skip non-applicable questions; 5. a redirect function that sends users to a page on the organization's website once they have completed a survey; 6. analytical tools that allow organizations to filter survey results and identify patterns; and 7. the ability to download survey results in formats suitable for integration with tools such as Microsoft Excel.
Virtual Phone-Banking	Enables a geographically dispersed group of supporters to make phone calls—with scripted messages—to a targeted population on behalf of a campaign. These tools are generally available only from advocacy technology vendors.
Online Community Building Tools	Allow organizations to offer website discussion forums, chat rooms, and social networking tools that help supporters find and connect with each other to discuss issues important to an advocacy campaign. Blogs are an increasingly popular tool for this type of online community building. Engaging and conversational in tone, blogs invite commentary from readers who help to generate a participatory dialogue around a campaign's issue(s). Links to other blogs expand the dialogue and further build the online community.
Constituent (Supporter) Relationship Management (CRM) Tools	Allow organizations to compile and track information about their supporters. Using an online database with powerful analytical tools, organizations can keep track of email addresses and capture additional demographic and behavioral data that can be used to plan and target online communications. The ability to distinguish enthusiastic donors from casual ones and die-hard online activists

	from occasional ones are important analytical insights that a CRM tool can help generate. Key features are: 1. the ability to easily import and export member records and attach information; 2. automatic tools for removing duplicates; 3. statistical reporting tools that track supporter behavior; 4. a sophisticated query feature for segmenting member lists based upon member characteristics; 5. a broad range of custom fields for capturing a variety of data about members (e.g., contact information, whether they are donors, whether they have taken actions requested by the campaign, and demographic information).
Peer-to-Peer Organizing and Fundraising Tools	Equips supporters with online vehicles to recruit and organize other supporters. These software tools are modeled on those traditionally used by organizations conducting "walk-a-thons" for fundraising. They allow supporters to create individual or team "mini-sites" where they can post their names, bios, photographs, and information they choose to provide about a campaign. Supporters can upload email addresses and send them to their friends and colleagues to recruit support or solicit donations. While the majority of vendors offering peer-to-peer organizing tools tend to focus on online fundraising, some vendors' tools can be adapted to serve other online organizing strategies as well.

While each of these tools is increasingly offered by a variety of technology vendors, the tools can vary significantly from vendor to vendor. An organization's choices about which tools to incorporate and when they should be incorporated will depend on its financial and human resource capacities as well as its strategic concerns.

In the following case study, a coalition employed peer-to-peer organizing to equip its supporters with the necessary technology tools to raise funds and to meet its advocacy goals.

CASE STUDY

Peer-to-Peer Organizing and Fundraising: The Yes on 63 Campaign

In 2004, a coalition of mental health organizations launched a ballot initiative campaign in California to increase the personal income tax on those annually earning more than $1 million to fund an array of mental health services. The coalition was comprised of several organizations—including the National Alliance on Mental Illness, the nation's largest grassroots mental health organization—with very large memberships who cared deeply about this issue. It decided to hire a general campaign consultant to develop the overall strategy. The consultant hired a strategic consulting provider (defined later in this section) to spearhead the online strategy, which was largely devoted to raising funds to finance television advertising, especially during the critical last few weeks of the campaign.

As the campaign's online strategy evolved, there were two key challenges:

1. **The possibility of an opposition campaign:** Even though there was broad support for Proposition 63 among interested stakeholders in the state, mental health care was not a particularly salient issue for voters. The campaign, therefore, needed to increase its visibility to grow a base of support. However, it was also concerned about provoking possible opposition, particularly the anti-tax lobby, into mobilizing its own campaign. The campaign consequently opted to pursue an "under-the-radar" strategy, preferring an approach that would not attract major attention to its website.
2. **Its target audience was not tech-savvy:** Because the members of the large organizations in the Yes on 63 coalition were comprised of demographic groups who tended to use the Internet less frequently than the general population, the campaign knew a strategy that relied heavily on recruiting support through the Internet would not be very successful.

To address both of these challenges, the campaign pursued an online fundraising strategy that would use existing supporters to generate new backing. For broader outreach and education activities, the campaign relied on offline efforts.

The online campaign launched in mid-January for the November ballot. Although the online strategy used the Internet to help organize house party fundraisers, the core component was a fundraising strategy focused on mobilizing core supporters: persons affected by mental health care issues or persons who worked with mental health patients. These people, it was hoped, would reach out to the next circle of people—their friends, families, and colleagues—to build support and increase donations.

The initial thrust of the campaign's online fundraising strategy was to grow its existing email list of 3,000 supporters. Before

appealing for donations, organizers cultivated a relationship with these supporters to encourage them to draw in others to join them. The campaign provided daily updates on its main website and sent weekly emails to supporters about campaign-related developments.

Following on its initial efforts to grow general awareness and expand its email list, the campaign adopted a "peer-to-peer" fundraising model that relied on small fundraising teams to solicit donations from friends and colleagues using functionality on the campaign website. This web-based system allowed supporters to have their own mini-websites, where they formed teams and accepted online donations. Moreover, each member of the team had an individual webpage to post photos and personal comments describing why he or she was supporting the campaign.

Team members were able to upload email addresses and send emails from their personal pages to friends and family, directing them back to their personal web page to donate money. The personal page listed the individual's fundraising goal and a thermometer to show progress.

Nearly six months into the 10-month campaign, organizers began to utilize traditional campaign strategies to bolster the effectiveness of online fundraising. They hired five field staff, spread across the state, to meet with organizations and get them to commit to forming online teams.

This strategy worked particularly well in recruiting several organizations to create online fundraising teams. As much as 40 percent of the funding generated through online teams was transacted through face-to-face interactions. The Internet merely provided an organizing vehicle and a shared web space for individual teams to monitor their success and recruit new supporters. The campaign's effort generated hundreds of thousands of dollars to support the campaign.

Tools That Stand Alone vs. Tools That Are Integrated

In the complex landscape of technology tool vendors, choosing technology tools can be daunting. However, there are some major differences among existing technology tools, with important implications for how organizations design their e-advocacy strategies. One such difference is between tools that are designed to work independently, so-called "standalone" tools, versus those that are designed to work together as an integrated toolset.

Many of the software tools nonprofit organizations use can be characterized as "standalone" software tools.[37] Standalone means that the technology tools are largely designed to work by themselves as independent software products.[38] Examples of these kinds of technologies include databases such as Filemaker Pro or Microsoft Access; email tools such as Microsoft Outlook or Eudora; and word-processing applications such as Microsoft Word. Technology tools used for advocacy can also come in this similar "standalone" form. Table 3 lists some of the more prominent standalone technology tools and their providers.

Standalone technology tools are usually offered by separate vendors and can be mixed and matched as they suit the particular needs of a campaign. The advantage of using these tools is that they are generally very affordable and fairly easy to set up and use. However, they do present a major drawback: They lack the ability to automatically share data with each other. As discussed next in integrated toolsets, the ability of technology tools to automatically share data offers powerful capabilities for organizations to track the effectiveness of their online interactions with their supporters as well as to target their communications.

FIGURE 5.

Standalone Technology Tools: The *a la Carte* Option

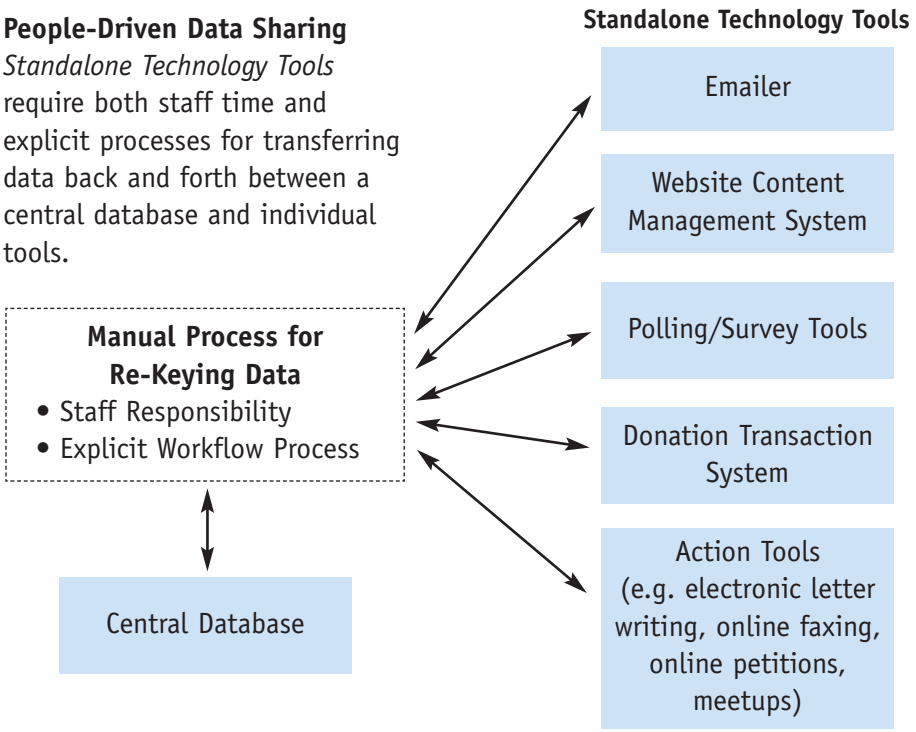


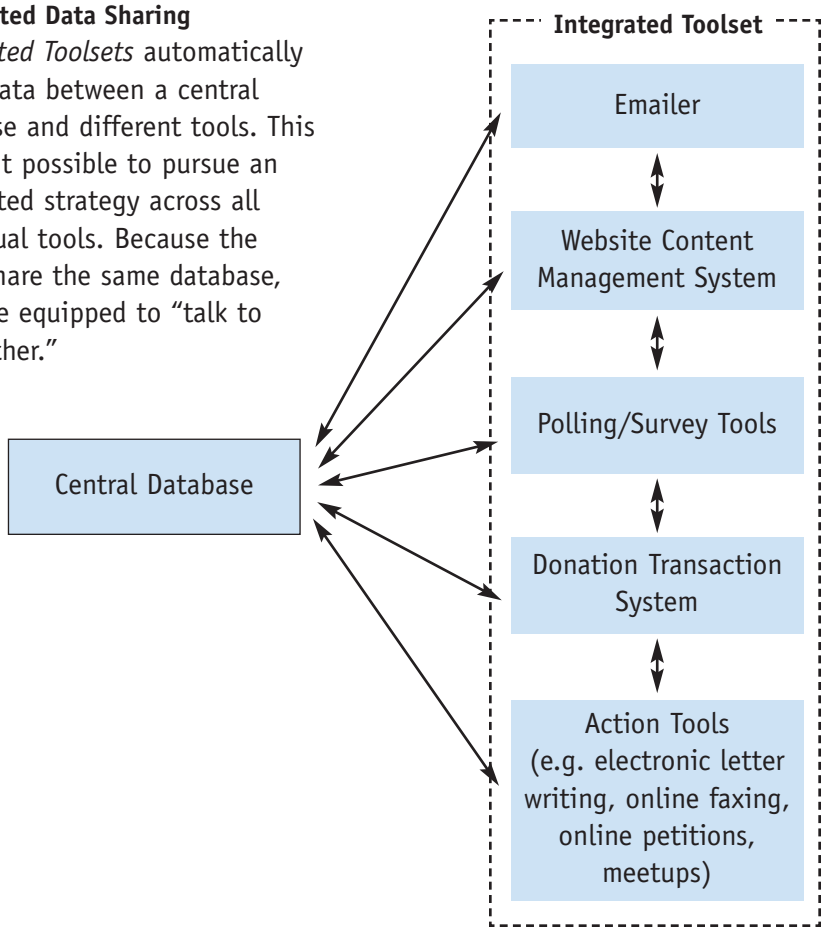
TABLE 3. Standalone Technology Tools and Their Providers

Tool	Provider
Electronic Letter-Writing and Online Faxing	➤ Electronic Letter-Writing (www.citizenspeak.com) ➤ Faxing (www.greenfax.com)
Databases	➤ Microsoft Excel (www.microsoft.com) ➤ Microsoft Access (www.microsoft.com) ➤ FileMaker Pro (www.filemaker.com) ➤ Ebase (www.ebase.org)
Bulk Emailers	➤ Email Now (www.groundspring.org) ➤ Constant Contact (www.constantcontact.com) ➤ GraphicMail (www.graphicmail.com) ➤ Jango Mail (www.jangomail.com) ➤ Mailer Mailer (www.mailermailer.com) ➤ Blue Hornet (www.bluehornet.com) ➤ Email Labs (www.emaillabs.com)
Website Content Management Systems	➤ Mambo (www.mamboserver.com) ➤ Drupal (www.drupal.org) ➤ Joomla (www.joomla.org) ➤ OpenACS (www.openacs.org)
Polling/Survey Tools	➤ Survey Monkey (www.surveymonkey.com) ➤ Zoomerang (www.zoomerang.com) ➤ Zip Survey (www.zipsurvey.com)
Donation Transaction Systems	➤ Donate Now (www.groundspring.org) ➤ Network for Good (www.networkforgood.org) ➤ eTapestry (www.etapestry.com) ➤ Democracy In Action (www.democracyinaction.org)
Action Tools	➤ CitizenSpeak: Electronic Letter-Writing Tool (www.citizenspeak.org) ➤ The Petition Spot: Online Petition Tool (www.petitionspot.com)
Online Tools to Organize Offline Gatherings	➤ Evite (www.evite.com) ➤ Eventbrite (www.eventbrite.com) ➤ Meetup.com (www.meetup.com) ➤ Upcoming.org (www.upcoming.org)

FIGURE 6.

Integrated Toolsets: Tools That Work Together

Automated Data Sharing
Integrated Toolsets automatically share data between a central database and different tools. This makes it possible to pursue an integrated strategy across all individual tools. Because the tools share the same database, they are equipped to "talk to each other."



In integrated toolsets, each of the standalone tools listed in Figure 6 work together as an integrated system. They are able to "talk" to each other because they share a central database. As a result, organizations can eliminate the partitioning of data into different functional databases. Integrated toolsets provide organizations with an integrated and more holistic view of their diverse supporters.

Specifically, integrated toolsets allow organizations to track the effectiveness of their online strategies across multiple technology tools, including websites, email, donation tools, electronic letter-writing applications, etc. The toolset allows for the creation of a multi-layered picture of the supporter's activity, which helps to assess that supporter's level of engagement with the campaign. This level of detail can inform the campaign about which supporters are most likely to answer an email call to action, to make a donation, or to help organize a house party. It identifies the number of emails a particular supporter has opened; whether that supporter has made a donation within a specified period of time, registered to attend a house party, or visited the campaign's "Take Action" webpage. Known generally as a "constituent relationship management" (CRM),[39] this capability allows campaigns to

TABLE 4. Integrated Technology Tool Providers

Integrated Tool Providers	Web Address
Action Potential	www.actionpotential.org
Activist Mobilization Platform	www.radicaldesigns.com
Advocacy Inc.	www.advocacyinc.com
Antharia	www.antharia.com
Blackbaud	www.blackbaud.com
Convio	www.convio.com
CitySoft	www.citysoft.com
CivicSpace	www.civicspacelabs.com
Democracy in Action	www.democracyinaction.org
Get Active	www.getactive.com
Grassroots Enterprise	www.grassroots.com
Groundspring	www.groundspring.org
Kintera	www.kintera.org
Local Voice	www.localvoice.com
Orchid Suites	www.orchidsuites.net

view multiple ways in which they have built a relationship with an individual supporter.

Table 4 lists technology tool providers that offer integrated toolsets. Each of these providers also offers many of the standalone tools listed in Table 3 as an à la carte option.

Despite their many benefits, there are drawbacks to integrated toolsets: Commercial integrated toolsets are generally costly to set up and have high recurring fees. They require conversion of existing data, systems, and business processes in order to use them to their full capability. However, if an organization or coalition has the resources to use integrated toolsets in its advocacy campaigns, the results can be very useful in measuring the level of audience engagement and determining future online communication strategies.

Measuring Effectiveness: Tracking Online Campaigns

Monitoring the effectiveness of online campaigns is one of the most important, and at the same time, least developed, practices among organizations. Campaigns can use online tools most effectively by setting up processes for conducting systematic, ongoing evaluations of how audiences are interacting with both their websites and their email.

If an organization or campaign is deliberate about using every opportunity offline to drive people to its website, then it is important to monitor the effectiveness of those efforts, especially after events such as rallies, convenings, or mass mailings. It is also critical to monitor these results on an ongoing basis after media attention, email blasts, newsletters, and other online communications.

Tracking Website Effectiveness

There are various metrics[40] for monitoring activity at the campaign website. Website metrics can help a campaign identify when the website received the most visitors, which campaign documents are being downloaded, what pages are of most interest on the site, how visitors are arriving at the website, and whether they are taking action.

The primary tool for monitoring these metrics is known as "server reporting" or "server log analysis" software. This tool generates website statistical reports that capture such information as the number of site "hits,"[41] the number of unique visitors (described later in this section), and how long visitors are staying on the site. Organizations that currently have their sites hosted by integrated toolset providers (see the list in Table 4) can obtain these reports directly from their service provider.

Server reporting software can help an organization create statistics to track the following online activity:

- **Web page views:** Tracks the number of times a user views a page; allows a campaign to identify which pages on the site are viewed most. It is an important metric for assessing how effectively a campaign is driving user traffic to its website.
- **Document downloads:** Determines which files are being downloaded from the website. An organization can monitor how often its research reports, issues briefs, flyers, etc., are being downloaded by website visitors.
- **Length of site visit:** Tells how long a visitor stays at the website. For campaigns, it is a good indication of how rich and engaging the content is.
- **How visitors arrived at the site:** Determines whether users find the website through a search engine, by clicking a link in an email, from another website, or typing in the domain name. Knowing how visitors arrived at a campaign's website is a key way for determining and evaluating the effectiveness of online and offline website promotion strategies.
- **Where visitors leave the site:** In addition to understanding how visitors are getting to the campaign site, it is important to understand where they are exiting. This metric determines which pages are most frequently used to leave the site. If particular pages are highly used for exiting, they may require changes.
- **Unique site visitors:** Determine how many visitors are actually additional people and not the same people repeatedly returning to the site. Because the same person may visit the site several times before taking an action, it is important to identify the difference between the two. This metric uses the IP addresses[42] of visitors. No two computers will simultaneously share the same IP address while a user is online, so IP addresses can serve as a useful indicator to identify unique individuals.
- **Tracking actions and creating "conversion rates":** These rates are the percentage of people who completed an action on the website out of the total number of unique visitors to the web page where that call to action is available. It is important to monitor the types of actions supporters are taking and to develop "conversion rates" for different actions, including making donations, signing a petition, registering for an event, or sending an email to a decision maker.

Equally important to monitoring these metrics, is monitoring them over time. This allows a campaign to identify website activity around

specific external events such as news coverage or rallies, as well as general trends in website usage, including specific details about page views, site visitors, responses to calls to action, and overall visitor or supporter behavior.

Tracking Email Effectiveness

Many of the same technology tool providers that offer functionality to track website effectiveness also allow a campaign to track email effectiveness. Campaigns can measure what percentage of messages sent to an email list were returned, how many were opened, the number of email recipients who "clicked through" to a website for further action, and the percentage of emails that were forwarded to others.

There are a number of email metrics that are integral to a good campaign tracking system.

- **Open rate:** The term "open" refers to the number of recipients who actually open the email. The rate is measured by how many email messages are opened divided by the total number of emails delivered. As discussed earlier, only the "subject" and "from" lines are visible in an unopened email message. They are, therefore, important factors in determining whether a message gets opened.

  It is important to note that in many cases, the open-rate metric can be very inaccurate. Because bulk email services rely on HTML graphics to track open rates, text-only email readers and graphic filters can lead to an underreporting of actual open rates. Therefore, it is important to use the "open-rate" metric in combination with other metrics to more accurately evaluate and troubleshoot the effectiveness of email communications.

- **Click-through rate:** Measures the number of email recipients that "clicked through" to the campaign website from a link in the body of an email message.[43] This could entail clicking through to take action, making an online donation, or viewing an online video. Click-through rates track the effectiveness of the message content as well as its layout and design.

- **Bounce rate:** Assesses the quality of an email list and determines the email delivery rate; specifically, this rate shows how many email addresses that are potentially faulty. It is important to track and remove faulty email addresses because repeatedly sending bouncing emails can potentially get flagged as spam by an Internet Service Provider, which could result in blocking all email communications.

  There are two types of bounces to be aware of:

  - **Soft bounces:** Temporarily undeliverable emails, usually because of a busy email server on the recipient end.
  - **Hard bounces:** Permanently undeliverable emails because of faulty addresses.

- **Delivery rate:** Determines the number of people who are sent email messages minus the number of messages that bounced back.

- **Unsubscribe rate:** Identifies the percentage of people who ask to be removed from the campaign email list. This metric is important to track because it helps to assess the health of the email list. Tracking unsubscribe rates over time is a way of identifying early signs of "list fatigue" as users opt out of the list for reasons including the frequency of emails or the email content.

- **New subscriber rate:** Tracks the number of people wishing to be added to the

campaign email list. Tracking the rate of new subscribers can help gauge the effectiveness of specific outreach tactics. Comparing the unsubscribe and new subscriber rates can help a campaign determine its "net subscriber"[44] rate, which helps to evaluate the condition of an email list.

- **Forward rate:** Allows the campaign to track the effectiveness of "viral" message dissemination tactics. Forward rates tell if an email message reached new audiences through features such as "send-to-a-friend."
- **Response rate:** Evaluates the effectiveness of a particular call to action by identifying the percentage of email recipients who take action or actions requested at the campaign website.

As with monitoring website metrics, it is important to evaluate the consistency of email metrics over time. Constant tracking of these metrics can help an organization set benchmarks against which they can evaluate odd fluctuations at certain times that may point to problems with email delivery or message content. Monitoring general trends, furthermore, can help an organization assess the "health" of its email list and ascertain signs of "list fatigue" among its current subscribers. Identifying and responding to list fatigue is an important requirement for conducting effective, long-term e-advocacy campaigns.

In all, monitoring email and website activities permits advocacy campaigns to determine whether messages are reaching audiences and whether they are responding to calls to action as requested. Because these statistics have broad implications, advocacy organizations are increasingly expecting measurable results to help determine the effectiveness of their campaigns.

The following case study illustrates how an advocacy campaign tracked the results of its email communications to targeted audiences and succeeded in effectively disseminating key campaign messages.

CASE STUDY

"Narrowcasting"[45] Advocacy Messages and Tracking the Results:

The No on Proposition 54 Campaign

Culminating in October 2003, a broad coalition of civil rights and social justice organizations led an advocacy campaign to oppose an initiative placed on the California state ballot. The proposed state constitutional amendment, "Proposition 54: Classification by Race, Ethnicity, Color, or National Origin," would have effectively banned the collection of data identifying individuals by their race, ethnicity, or national origin in a wide array of state-funded programs. Because of concerns about the ramifications of such an initiative on public health research, discrimination, and education, a coalition formed to organize opposition to the ballot measure.

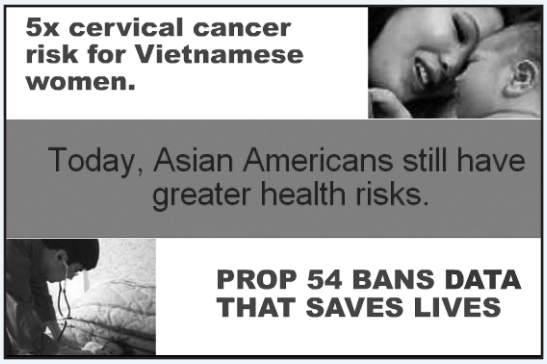
The American Civil Liberties Union (ACLU) of Northern California, one of the anchor organizations in the "No on Proposition 54" campaign, partnered with a technology toolset provider[46] to develop and implement an Internet strategy that would get out the No on Proposition 54 message and to help raise money for the campaign. A "viral" multimedia Internet strategy was developed to launch the online campaign. The core goal of the strategy was to reach out to communities of color who, according to poll data, were inclined to vote yes on the initiative and to provide them with compelling reasons to switch their votes to no. The campaign used the Internet to help broadcast custom messages targeting specific racial and ethnic segments of the California electorate.

The campaign created a series of four Flash animation pieces, incorporating key messages used throughout the campaign with new and compelling visual narratives—each tailored to address African-American, Asian-American, and Latino voters. Each animation incorporated a series of messages along with background music that focused on specific issues that mattered to the targeted community.

After creating the Flash animations and posting them to a website, the next phase of the online strategy involved sending emails to potential voters—specifically targeting African-American, Asian-American, and Latino voters—to get them to view the animations. The ACLU's existing email list was short and did not come with racial or ethic descriptors that would allow for easy segmentation and targeting of email blasts. The solution was to request that allied organizations, representing particular racial or ethnic communities, send out emails to their lists containing links to the targeted Flash animations. The initial recipients of the email messages were asked

continued

continued



to forward them to friends and colleagues. Over a couple of weeks, the campaign sent out six different email "blasts" to approximately 40 to 50 email lists of allied organizations. The campaign tracked emails and was able to monitor the percentage of recipients who opened the email messages containing links to the Flash animations, the percentage that "clicked through" and viewed the videos, and the percentage who forwarded the message to others. By tracking these data, the campaign determined that "viral" dissemination of its targeted messages was indeed successfully taking hold.

The No on Proposition 54 campaign also used a technique known as "micro-campaigning" as an online fundraising strategy. Micro-campaigning involves sending out email fundraising pleas that put forth a particular goal (e.g., getting an ad placed on the air or hiring a field organizer) or to support a tactic in response to a direct action taken by an opposition campaign. The campaign sent out email blasts pointing to a digitized version of a television ad that it had aired a few times in the state. The emails requested that recipients make a donation to keep the ad on the air, creating the sense that donors were getting a tangible outcome for their contributions, particularly if they acted quickly.

The e-advocacy tactics and a robust multimillion-dollar media campaign proved successful for the opponents of Proposition 54. On October 7, 2003, the initiative was defeated.

Technology Tools and Strategic Service Providers

Service providers for e-advocacy are as diverse as the needs of the varied organizations that engage in advocacy. However, there are a few general categories of providers available to meet an organization's strategic advocacy needs.

Technology Tool Providers

Technology tool providers offer a broad variety of software tools that differ in two general respects:

1. Some technology tools are commercial software that are offered to organizations for a fee, while others are "open-source" (see the description that follows) tools that are created by open-source developer communities and shared with the general public for free.

2. Among commercial software tools only, some are made available as a "product" that organizations purchase and manage themselves versus software offered and managed by Application Service Providers (ASPs)[47] who charge a monthly fee.

The majority of integrated technology toolsets offered today is commercial software services that are rented to nonprofits over the Internet for a monthly fee.[48] These tools, which can differ significantly in price and functionality, share the characteristic of being generally easy to set up and have the advantage that the ASP is responsible for hosting and maintaining the technology. A major downside to proprietary ASPs is that they generally adopt a "one-size-fits-all" approach in the tools they offer. Targeting as large a market as possible, the technology tools offered by these companies may not have the flexibility to match evolving needs of individual organizations over time.

Open-source software tools are made freely available to the public under noncommercial licensing agreements. Created by open-source developers, they offer various alternatives to expensive proprietary technologies. An advantage of these tools is that the software code itself can be modified and its functionality extended to more closely align with a particular organization's needs. When developers—who

TABLE 5.

TECHNOLOGY VENDORS, DEVELOPERS, AND COMMUNITIES

Technology Vendors/ Open-Source Developers	Web Address
CitySoft	www.citysoft.com
Convio	www.convio.com
Democracy in Action	www.democracyinaction.org
Get Active	www.getactive.com
Kintera	www.kintera.org
Local Voice	www.localvoice.com
Open-Source Technology Development Communities	**Web Address**
CivicSpace Labs	www.civicspacelabs.com
Radical Designs	www.radicaldesigns.org

TABLE 6.

Technology Vendors and Strategic Service Providers

Vendor/Services Provider	Web Address
Advocacy Inc.	www.advocacyinc.com
Capitol Advantage (and E-Advocates)	www.capitoladvantage.com
CTSG	www.ctsg.com
Grassroots Enterprise	www.grassroots.com

support open-source tools—enhance their products, they freely share their modifications with others. The biggest challenge with these tools is that organizations, without the requisite technical understanding of open-source programming, may find it difficult to set them up and manage them. However, there are third-party service vendors[49] who will set up open-source software for organizations and assist them in customizing it to match their needs.

Technology and Strategic Consulting Providers

Technology and strategic consulting providers are hybrid commercial technology vendors who offer technology platforms as well as strategic political consulting. While most ASP vendors who provide integrated platforms are strictly technology-focused, some vendors also provide strategic consulting services for online communications. In particular, these technology and strategic consulting providers help nonprofit organizations blend online activities and offline strategies such as media work, field organizing, and polling. Additionally, these ASP vendors help organizations develop online strategies using their proprietary technology.

Strategic Consulting Providers

Strategic consulting providers are technology and communications consultants who do not sell technology tools themselves, but help

TABLE 7.

Strategic Consulting Providers

Provider	Web Address
Development Seed	www.developmentseed.org
Donor Digital	www.donordigital.com
Echo Ditto	www.echoditto.com
Open Concept Consulting	www.openconcept.ca
Polycot	www.polycot.com
Radical Designs	www.radicaldesigns.org
Scout Seven	www.scoutseven.com
Trellon	www.trellon.com

organizations use technology tools provided by commercial vendors and open-source developer communities. Several strategic consulting providers take open-source technology tools and tailor them to the needs of particular organizations or develop online strategies for organizations, using the proprietary software from other proprietary ASP vendors. These service providers bring the strategic and technical expertise to help nonprofits use technology tools that already exist in the marketplace. Their business models are focused more on how to use technology tools for strategic impact rather than marketing a set of branded technologies. Many of these firms specialize in advocacy campaigns while most can help organizations with more general online communications strategies.

Intermediaries and Research Institutes

Nonprofit intermediaries, trade associations, and research institutes broadly inform the nonprofit sector about technology and advocacy. Through conducting research, providing web-based resources, holding conferences, and providing trainings to build the capacity of nonprofit organizations to enhance their online efforts, these organizations enable nonprofits to better understand online communications and its ramifications for advocacy.

In different ways, all of these technology vendors, service providers, and capacity-building intermediaries play important roles in helping nonprofit organizations choose the technology tools that best match their needs and apply them to effectively support and ultimately achieve their advocacy goals.

➤ TABLE 8. Intermediaries and Research Institutes

Intermediary/Research Institute	Web Address
Aspiration	www.aspirationtech.org
Alliance for Justice	www.allianceforjustice.org
California Community Technology Foundation	www.zerodivide.org
Center for Information and Research on Civic Learning and Engagement (CIRCLE)	www.civicyouth.org
Congress Online Project (Congressional Management Foundation)	www.congressonlineproject.org
Groundspring	www.groundspring.org/learningcenter/index.cfm
Institute on Politics, Democracy, and the Internet	www.ipdi.org
NP Action from OMB Watch	www.npaction.org
NTEN	www.nten.org
Organizer's Collaborative	www.organizerscollaborative.org
Personal Democracy Forum	www.personaldemocracy.com
PolicyLink	www.policylink.org

4 Integrating Technology Tools into the Organization

Barriers and Opportunities

Organizations are recognizing the need to integrate technology tools into communications strategies, including how they:

- collect, store, maintain, and process data so that the tools can be used to connect with supporters online;
- incorporate staff (including communications, policy, fundraising, and field staff) in the design and maintenance of websites to keep fresh content consistent with and supportive of evolving advocacy goals;
- monitor the online actions of those who receive their email communications and visit their websites so they can refine and improve their strategies;
- use online communications to support offline events;
- utilize offline events and print materials to build online traffic and increase the organization's base of supporters;
- work collaboratively with other organizations to develop shared online communications strategies to empower and unify supporters and stakeholders; and
- contact and influence decision makers.

Advocacy organizations of all sizes and resources are experimenting with and succeeding at integrating online and offline strategies. They are increasing awareness of issues and galvanizing support for proposed solutions. They are changing their strategies and retooling their organizations in ways that enhance their efforts for change and yield valuable lessons for advocates.

Organizations have to adapt how they work—their processes and practices—in order to utilize technology tools effectively. As PolicyLink has argued in its report, *Bridging the Innovation Divide: An Agenda for Disseminating Technology Innovations within the Nonprofit Sector* (available at www.policylink.org), simply acquiring technology tools does not equip an organization with the means to use them effectively. What is also needed is organizational change, involving the creation of new roles, new processes, and new strategies. To leverage technology for advocacy strategies, organizations must address the following barriers:

- Cost barriers: In addition to the actual costs of purchasing technology tools themselves, organizations are hindered by the "switching costs" of integrating technology into their current advocacy strategies.
- Leadership barriers: The reluctance on the part of organizational leadership is an important barrier to making technology a priority investment for enhancing advocacy strategies and tactics.

- Organizational barriers: A major barrier to implementing an organization-wide e-advocacy strategy, especially for large nonprofits, is the compartmentalization of technology strategy and data collection within functional silos of an organization (e.g., fundraising/ development, member management, communications, and organizers).
- Limited consulting support: The nonprofit sector has many technology tools to help support advocacy campaigns, but not enough strategic guidance in how to use them effectively. The limited availability of this type of consulting support continues to hinder the abilities of nonprofit organizations to aggressively pursue online strategies.

In spite of these barriers, many advocacy organizations are pursuing effective online strategies and tackling the organizational issues that arise in the process. This section of the report will examine some of these issues in more detail. They include:

- Strategy and Planning
- Leadership and Stakeholder Buy-In
- Adapting Organizational Processes

After examining these issues, the final case study, "The Ella Baker Center," illustrates how one organization is adapting to be more effective online.

Strategy and Planning

Before considering technology choices, organizations should first set clear goals and develop a coherent plan of action. The scope of effective planning not only entails developing a clear strategy for acquiring technology tools and deciding how to use them, but also determining whether and how online supporters will be recruited and how those relationships will be managed over time. In particular, e-advocacy must set a series of short-term, intermediate, and long-term goals that reflect the different stages in the overall advocacy campaign as well as evolving organizational capacity needs, resources, and staffing.

Leadership and Stakeholder Buy-In

The support of organizational leadership is critical to building an effective online strategy. The planning process for developing online communications must be aligned with the overall strategic mission and objectives of an organization or campaign. This may entail organizational restructuring, such as the creation of new roles and responsibilities, new processes and training, and new organizational reporting structures. Without leaders' support and the required allocation of time and resources, it may be challenging to implement effective online strategies.

In addition to leaders' support, it is important to gather input and buy-in from multiple stakeholders. Separate functional divisions within an advocacy organization (e.g., policy directors, development and fundraising staff, communications, member management, IT staff, and support staff) all have a role to play in an organization-wide online strategy. Multiple stakeholders should be involved in:

- building the organization's website and supplying it with fresh and updated content;
- capturing and managing data so that they are stored and maintained in a manner that supports online communications and fundraising; and
- streamlining the development and dissemination of email messages so that they are consistent with and reinforce offline messaging.

A sound, up-front planning process can identify how different members of the organization contribute to the implementation of the online strategy.

Adapting Organizational Processes

An organization's ability to support its online communications has to do with staffing, organizational processes, and the internal allocation of resources in ways that maximize the value of technology tools. Often, large and mid-sized organizations segregate technology resources along functional lines such as fundraising, communications, fieldwork, and membership. These separate areas have their own compartmentalized approaches to using the organization's technology assets, which affects how organizations capture and store information, how they communicate via email, and how they develop content and the frequency with which they add it to the organization's website. This compartmentalized approach is much less effective than one led by cross-functional teams as part of an organization-wide online communications approach. Cross-functional team approaches are necessary to support online communications primarily because many of the components of effective online campaigns fall outside the boundaries of roles as they have been traditionally defined within organizations.

The following scenario describes how conducting an effective email outreach campaign cuts across the responsibilities of multiple players and processes within an organization:

- *Policy or program staff and organizers* must help develop email message content that describes and frames the policy implications of an issue. They also select the audiences who will receive email calls to action. In addition, they decide the timing of email communications so that they are consistent with strategic opportunities.
- *Communications or staff writers* must review email message content for its framing, style, and consistency with campaign messages disseminated through other media and communication vehicles.
- *Technology staff* maintain databases that house email lists; pull needed data from databases that can be used to target communications to different types of supporters (email subscribers, those who have taken action in the past, donors, etc.); and design message formats in ways that will help draw recipients to read them and take action (i.e., sending emails in HTML versus plain text, deciding how to structure the layout of the message). They also must manage the actual "send" itself, including troubleshooting bounced emails and monitoring email metrics, such as open rates, click-through rates, and forward rates (as discussed earlier in this section, in "Tracking Email Effectiveness").
- *Support staff* are critical for receiving, routing, and responding to email communications from the general public and supporters. They also have a critical role to enter data collected offline into organizational databases.

These descriptions reflect both a clear set of roles and responsibilities as well as an explicit process for conducting large-scale email communications. Similar cross-functional team scenarios can apply to how content is developed and added to an organization's website as well as how online fundraising campaigns are implemented. To take full advantage of the power that technology tools and strategies have to offer, organizations need integrated processes that effectively coordinate staff resources. More and more organizations are increasingly creating staff positions specifically devoted to online strategy or online fundraising to build their internal capacity and to utilize technology tools for innovative approaches to e-advocacy.

CASE STUDY

The Ella Baker Center: An Organization That Is Ready for E-Advocacy

The Ella Baker Center for Human Rights (www.ellabaker.org) focuses on advocating for policy changes to replace California's incarceration industry, particularly its youth prison system, with healthier and more rehabilitative community-based alternatives. It has worked to ensure that its communication strategies incorporate multiple stakeholders within the organization and remain consistent with its offline strategies.

The organization engages in a variety of approaches to advocacy, including research and public education; working with the media to build awareness and visibility around youth incarceration issues; direct lobbying; and mobilizing grassroots activism. It is also willing to use a broad range of tactics, such as staging sit-ins, protests, and meeting with officials within the criminal justice system.

The Ella Baker Center is very intentional about incorporating Internet-based advocacy into its campaigns. For its Books not Bars campaign, a website was created to demonstrate the presence of the organization within the field and to build a large network of engaged supporters. The small size of the organization, along with the limited number of advocacy voices on juvenile justice, means that the website is a vital way to bring attention to the conditions of and the policies affecting incarcerated youth. The website is also used by staff to post photos that reflect the work, including photos from rallies and other activities.

The center uses email communications as an important vehicle to build its supporter base. It sent an email blast to every legislator in the state, inviting them to attend a screening of a film, *System Failure*, produced by the organization. An email call to action, with a tailored message, was sent to supporters, asking them to call the governor's office to express outrage over the lifting of a moratorium on sending youth to Chad—the worst among California's eight youth prisons. An online petition was also sent to the governor's office, asking him to close youth prisons. Through the online petition, the center was able to double the

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number of people on its email list. The email blast generated viral action and received attention from officials within the system.

The Ella Baker Center, through a mix of online and offline tactics, has grown its supporter base and reached those it serves. The center has proven that the Internet is only a part of its broader advocacy strategy. Organizing lobby days involves getting members—parents of incarcerated youth—to visit and talk with legislators. Parents are organized through phone, snail mail, and house visits. Where it is not effective to reach them through online tactics, the center has effectively utilized e-advocacy tactics to reach others who will attend rallies, therefore bringing attention to the issues. E-advocacy has also been effective in reaching out to legislators. The center is evidence that even though an organization's main constituent base may not be online, the Internet can still be of value in advocacy work.

Therefore, the leadership of the organization has made online communications and organizing strategies central to its approaches. This transition has required organizational restructuring and staff realignment to take full advantage of what technology tools, particularly Internet-based tools, have to offer. The organization has had to effectively develop its internal capacity. Important staff realignments included hiring an online communications director as well as full-time support staff dedicated to that function; allocating time from senior staff writers to developing online content; and tightly coordinating between the organization's online strategy team and its communications and policy staff.

The online communications director manages email campaigns and oversees organizational databases. The position is also the central liaison for online communications with the program director, media director, policy director, and organizing staff who comprise the key players in the editorial process. By receiving the support of the entire organization and addressing its staffing needs, the Ella Baker Center has increased its use of technology tools and strengthened its use of e-advocacy.

5 Concluding Thoughts

Incorporating online tactics into the core strategies of advocacy campaigns promises to transform traditional advocacy approaches in compelling and enduring ways. The potential of e-advocacy—as an "outside" approach that can help mobilize public will and support and encourage individuals and organizations to take action to engage with decision makers—is vast and far-reaching. But the realization of that potential rests with the deliberate and planned incorporation of online tactics into the core of traditional advocacy strategies. Moving towards that realization involves a number of important and enduring lessons for advocacy organizations.

Develop a clear advocacy strategy.

A well-conceived strategy is the first step in advancing an advocacy campaign. E-advocacy is an integral part of that strategy. Technology tools should not guide an organization's strategies, but the strategy should dictate which technology tools and tactics should be employed.

Integrate online and offline tactics.

A successful campaign requires offline and online strategies to be coordinated and reinforced. Online activities with the power to broaden the reach and speed with which an organization can communicate with supporters must be matched with offline activities that help reinforce commitment among supporters as well as reach audiences that are not easily accessible online. The nuanced and often shifting mix of online tactics and traditional offline approaches is a defining characteristic of most successful e-advocacy campaigns.

Know the audience and the goals.

The best websites are those that reflect a clear understanding of their goals and their audiences. If the campaign understands the audience, then content can be created that speaks to that audience. If the goal is to encourage action, then functionality—such as calls to action—should be clearly displayed. Knowing the audience will also inform the mix of online and offline tactics that a campaign uses.

Create an online presence that engages the audience.

Online communications, particularly websites and emails, can connect with audiences in very engaging ways. Using technologies such as blogs, podcasting, video, and Flash animations can create a very interactive experience for site visitors. Emails that provide useful information, are visually striking, and have calls to action are more apt to be virally disseminated. Moreover, sending regular email communications is a tactic that builds a campaign's supporter base.

Use technology tools to raise funds to support the campaign.

There is a vast array of technology tools that allow campaigns to collect donations and track donor giving. They provide the capabilities for supporters to provide credit card and check

processing; many tools will also process recurring, automatic payments. Allowing supporters multiple means to give to the campaign increases fundraising effectiveness.

Use integrated toolsets where possible.

While standalone tools can meet an organization's needs in many cases, integrated toolsets offer organizations powerful capabilities to streamline the collection of data and to improve the effectiveness of online activities. For organizations that seek to mobilize thousands of supporters, an integrated toolset can be a productive way to cultivate individualized relationships to deepen engagement and action.

Track the effectiveness of online efforts.

Monitoring the effectiveness of online campaigns is one of the most important techniques for organizations to determine if the campaign is meeting its desired goals. Campaigns that most effectively use online tools set up processes for conducting systematic, ongoing evaluation of how audiences are interacting with both their websites and their email. Gathering this information can help a campaign gauge the level of commitment among its supporters.

Ensure leadership and staff buy-in.

Leadership and staff support for using and integrating e-advocacy into an organization's core strategies and tactics is the crucial glue that binds the organization's multiple efforts together. To leverage the value of technology across an entire organization, there must be input from all stakeholders. Every member can contribute to the development and implementation of an online communications strategy.

Create an explicit workflow process.

As both a technical and strategic process, e-advocacy involves the entire organization and often implies changes in how organizational actors work together. For some organizations, building these new systems may require a formal restructuring that includes hiring new staff (e.g., an online communications director), assigning explicit responsibilities to existing staff, creating a formal team to manage online communications, and building a reporting system that incorporates built-in mechanisms for evaluation as well as ongoing strategic planning.

Conduct e-advocacy, no matter the organization's size.

E-advocacy campaigns can be executed in multiple ways. They can involve complex integrated toolsets with commercial software tools or they can involve standalone tools with free software tools. They can involve a multitude of online and offline tactics, or just a few. They can be sprints or marathons and target different audiences. What matters at the end of the day is strategy. An organization—whether large or small—should conduct e-advocacy campaigns that fit into its overall strategy within the limits of its organizational resources, the receptivity of advocacy targets and supporters, and clearly identified campaign goals.

Appendix

Organizations and Campaigns Interviewed

Association of Community Organizations for Reform Now (ACORN)—California
www.acorn.org

ACORN is the nation's largest community organization of low- and moderate-income families, with over 120,000 member families organized into 600 neighborhood chapters in 45 cities. Since 1970 ACORN has taken action and won victories on issues of concern to its members. Its priority issue areas include: better housing for first-time homebuyers and tenants, living wages for low-wage workers, more investment in underserved communities by banks and governments, and better public schools. ACORN seeks to achieve these goals by building community organizations that have the power to win changes—through direct action, negotiation, legislation, and voter participation.

The California Partnership
www.california-partnership.org

A statewide coalition of community-based organizations that fight poverty in California; it works together for common goals by organizing and advocating at the local, state, and national levels for the programs and policies that reduce and end poverty. Its overall goals are: (1) to win concrete gains in the lives of poor Californians; (2) to develop its collective political strength at the state level; (3) to strengthen organizations fighting crucial battles in their own communities; and (4) to strengthen California's role in the national debate around poverty issues.

The California Partnership currently has over 120 member organizations. It is organized into five active chapters: in the Bay Area (San Francisco, Alameda, and Contra Costa), in Fresno, in Los Angeles, in San Bernardino, and in San Diego. It also has members in San Jose, the Central Coast, other portions of the Central Valley, and the Sacramento Valley.

While The California Partnership annually focuses on specific legislative and budget objectives, it is also engaged in a long-term process of strategically expanding its network and strengthening its member organizations. It therefore invests significant time and resources in educating and training its member organizations and in seeking additional partners in its work, especially in underserved areas of the state.

Ella Baker Center for Human Rights: "Alternatives for Youth" Campaign
www.ellabaker.org

The Ella Baker Center for Human Rights (EBC) has a three-part mission:

1. to document, expose, and challenge human rights abuses in the United States criminal justice system;
2. to build power in communities most harmed by government-sanctioned violence; and
3. to develop and advocate for proactive, community-based solutions to systemic "criminal injustice."

EBC employs a wide variety of tactics to accomplish its mission, including grassroots organizing, direct-action mobilizing, media advocacy, public education, cultural activism, policy reform, and legal services. Books Not Bars, an advocacy project of the center, is fighting to redirect California's resources away from youth incarceration and towards youth opportunities. The Books Not Bars project's "Alternatives for Youth" campaign aims to close the California Youth Authority's abusive and costly youth prisons and replace them with rehabilitation centers and community-based programs.

Institute for Democracy, Education, and Access (IDEA)
www.idea.gseis.ucla.edu

The Institute for Democracy, Education, and Access is a network of UCLA scholars and students, professionals in schools and public agencies, advocates, community activists, and urban youth. IDEA's mission is to make high-quality public schooling and successful college participation a routine occurrence in low-income neighborhoods of color. Research and advocacy are the tools IDEA uses to empower individuals, build relationships, and create knowledge for civic participation and social change. Linking a great public research university with committed educators and supportive community alliances, IDEA seeks to become the intellectual home of a broad-based social movement that challenges the pervasive racial and social class inequalities in Los Angeles and in cities around the nation. IDEA's work advances a deep understanding of the causes and costs of educational inequality. It engages a remarkable group of urban teachers in creating examples of equitable public schooling and college access. It fosters public engagement, policy advocacy, and action infused with youth and community voices.

No On Prop 54 Campaign
www.noon54.org (website no longer active)

The ACLU of Northern California, as part of a statewide coalition of civil rights and other advocacy organizations, helped launch a ballot initiative campaign to defeat a proposition placed on California's ballot in October 2003. Officially named Proposition 54, but also known in the media as the "Racial Privacy Initiative," the proposed state constitutional amendment would have effectively banned the collection of data identifying individuals by their race, ethnicity, or national origin in a wide array of governmental programs. A broad coalition of organizations concerned with the ramifications of such an initiative on public health research, discrimination, and education mobilized to mount an effective campaign that ultimately defeated Proposition 54. The ACLU of Northern California, as the Northern California anchor for the campaign, launched an online advocacy campaign that targeted voters of color to persuade them to vote no on the initiative. The initiative ultimately failed by a landslide in October 2003.

The Pacific Institute for Community Organizing (PICO), California Project
www.picocalifornia.org

PICO California aims to bring the voices and concerns of regular Californians to the statewide policy arena. It is made up of 19 congregation-based community organizations representing 350 congregations and 450,000 families across the state.

PICO seeks to create new public policies and to change existing public policies in health care, education, housing, fair wages, immigration, and other areas that emerge as priorities from its member congregations. Today, PICO is actively organizing in 73 cities in Northern and Southern California and in over half of the State Assembly and Senate districts. It has working relationships with both Democratic and Republican representatives at federal, state, county, and city levels. Through its member organizations in each community, PICO unites people of diverse economic, racial, ethnic, and religious backgrounds. PICO California is the statewide project of the PICO

National Network, a national coalition of faith-based community organizations.

PowerPAC.org
www.powerpac.org

PowerPAC.org is a statewide nonprofit political organization championing democracy and justice in California. PowerPAC provides tools and resources to local leaders and organizations to bring more voters of color into the political process. PowerPAC conducts research and analysis on the state's political landscape to identify the most strategic areas of focus. The organization has a plan to lead bold, long-term, and sophisticated electoral campaigns in these strategic areas that will bring thousands of voters of color into the political process. There voters will be the margin of difference to create progressive change in communities, as well as have the potential to swing statewide elections. A major guiding principle for its electoral work is PowerPAC's belief that every person should have economic dignity and security; every family should have quality health care, education, and housing. The organization envisions a future for California in which the electorate is energized, empowered, and reflective of the state's growing diversity.

PowerPAC officially began in 2004, after helping run the successful field operation against Proposition 54 during the 2003 recall election. The defeat of Prop 54 provided a glimpse into the future of California politics and demonstrated the potential for forging a powerful, multi-racial, unapologetic, electoral majority for justice. Equally important, the Proposition 54 campaign reunited long-time activists and organizers who worked together to conduct a grassroots operation that helped erase a 21-point deficit in the polls. Since then PowerPAC has worked with dozens of existing grassroots organizations to help them increase voter turnout in the fastest-growing and thus most strategic parts of the state, primarily the Inland Empire in Southern California.

The Ruckus Society
www.ruckus.org

Providing environmental, human rights, and social justice organizers with the tools, training, and support needed to achieve their goals, this organization sees itself as a toolbox of experience, training, and skills. It provides instruction on the application of tactical and strategic tools to a growing number of organizations and individuals from around the world in skill shares and trainings designed to move advocacy campaigns forward. It does this work in strong collaboration with partner organizations, working together to define and create the training agenda.

Sacramento Housing Alliance
www.sachousingalliance.org

The Sacramento Housing Alliance (SHA) is a 501(c)(3) nonprofit coalition of individuals and organizations working to promote decent affordable housing and opportunities for lower-income households and homeless people through advocacy, public education, and participation in community affairs. SHA provides housing newsletters, newspapers written by homeless individuals, and community workshops on affordable housing and fair housing needs.

SHA also sponsors special events to reach out to the entire Sacramento community regarding affordable housing issues.

The Schuylkill River Park Campaign
www.freetheriverpark.org

This effort led by community residents of Philadelphia seeks to pressure a large national freight train company to remove barriers to city-built amenities at the local Schuylkill River Park. The campaign has used an innovative collection of tools and tactics to create pressure on the private company for change. To learn more, see the case study, "Interweaving Online and Offline Tactics: Free the Schuylkill River Park Campaign," in Section Two.

South of Market Community Action Network (SOMCAN)
www.somcan.org

SOMCAN was founded in 2001 by a group of grassroots organizations committed to serving the needs of youth, seniors, veterans, the Filipino community, low-income residents, and the homeless in the South of Market (SoMa) neighborhood in San Francisco. Initially the organization came together informally, attracting individual residents, small businesses, and nonprofit organizations concerned about the unprecedented and unrestricted level of gentrification and displacement taking place in the neighborhood. The goal of the organization was to support community members in immediate threat of eviction in the form of offering space for meetings, assisting with needed resources, and providing a collective voice. Finding that this form of community organizing was very successful and seeking to leverage the power needed for residents to be heard and achieve their goals, SOMCAN has taken a community building approach to neighborhood improvement. It is creating a vehicle for community members to come together to develop and implement a collective agenda. Its vision is to enhance the ability of SoMa's community-based infrastructure to attract resources for community building work, influence public policy decisions, identify and nurture new leadership among people of color, youth, women, low-income and immigrant people, and build relationships and social capital that can foster collective action for community improvement.

Strategic Concepts in Organizing and Policy Education (SCOPE)
www.scopela.org

SCOPE's mission is to develop multidimensional approaches that reduce or eliminate structural barriers to social and economic opportunities for poor and economically disadvantaged communities and communities of color. SCOPE pursues this mission through four strategies:

1. Building models of increasing civic participation where poor and disadvantaged communities and communities of color can become active participants in public policy-making and initiatives that impact their lives.
2. Working to develop strategic alliances between diverse communities and constituencies that link addressing local social and economic conditions with regional initiatives and economic/social agendas.
3. Equipping poor and disadvantaged communities and communities of color with the strategic research/analysis, educational tools/methodologies, and the use of technology needed to understand the nature of structural economic changes and to develop proactive responses, which address issues and needs.
4. Providing training and strategic facilitation to ally organizations, in order to build connections, relationships, and collaborations at local, regional, state, national, and international levels to enable poor and disadvantaged communities and communities of color to respond to the challenges of regionalism and globalization.

The Transportation and Land Use Coalition (TALC)
www.transcoalition.org

TALC is a partnership of over 90 groups working for a sustainable and socially just Bay Area. The organization envisions a region with healthy, vibrant, walkable communities that provide all residents with transportation choices and affordable housing. TALC analyzes county and regional policies, works with community groups to develop alternatives, and coordinates grassroots campaigns.

The Yes on 63 Campaign
www.yeson63.org

In California in 2004, a broad coalition of mental health organizations launched a ballot initiative campaign to increase the personal income tax on those earning more than $1 million per year to fund an array of mental health services. The campaign was comprised of several organizations with very large memberships who cared deeply about the issue. Known as the "Yes on 63" campaign, the coalition was able to create an innovative and a successful "peer-to-peer" fundraising campaign to help finance television ads and other voter outreach efforts that ultimately led to the success of the initiative. For more information, see the case study, "Peer-to-Peer Organizing and Fundraising: The Yes on 63 Campaign," in Section Three.

Additional Resources

Books and Online Manuals

Advocating for Change: A PolicyLink Advocacy Manual, PolicyLink
www.policylink.org/AdvocatingForChange

Democracy Owner's Manual, Jim Shultz
www.democracyctr.org/resources/manual

Extreme Democracy, edited by Jon Lebkowsky and Mitch Ratcliffe
www.extremedemocracy.com

Online Campaigning 2002: A Primer, Institute for Politics, Democracy, and the Internet
www.ipdi.org/UploadedFiles/onlinecampaigning2002.pdf

Online Organizer's Manual, Live Modern
www.livemodern.com/Members/Marshall/resumefolder/manual

Winning Campaigns Online: Strategies for Candidates and Causes, Campaign Advantage
www.campaignadvantage.com/publications/book

Guide to Online Communications Tools

Email Marketing Best Practices: A Collection of Articles on Email Marketing, Email Labs, October 2004
www.emaillabs.com/pdf/BestPracticesArticles.pdf

IdealWare
www.idealware.org

Tips for Tracking Online Communications

eNonprofit Benchmarks Study: Measuring Email Messaging, Online Fundraising, and Internet Advocacy Metrics for Nonprofit Organizations, M&R Strategic Services and the Advocacy Institute
www.e-benchmarksstudy.com/pubs/eNonprofit_Benchmarks_Study.pdf

Endnotes

1. The five case studies in this report exemplify these new opportunities at work.
2. For more details about this and other successful campaigns of this organization, visit www.MoveOn.org.
3. Lee Rainie et al., "The Internet and Campaign 2004: The Internet was a key force in politics last year as 75 million Americans used it to get news, discuss candidates in emails, and participate directly in the political process," Pew Internet & American Life Project, March 6, 2005; retrieved from www.pewinternet.org.
4. Andrew Chadwick, *Internet Politics: States, Citizens, and New Communication Technology* (New York: Oxford University Press), 2006.
5. *Ibid*.
6. *Ibid*.
7. *Ibid*.
8. For information on record voter turnout, see Daniel E. Bergan et al., "Grassroots Mobilization and Voter Turnout in 2004," *Public Opinion Quarterly*, Vol. 69, No. 5, Special Issue 2005, pp. 760–777.
9. Rainie, *op. cit.*
10. *See* Joel David Bloom, "The Blogosphere: How a Once-Humble Medium Came to Drive Elite Media Discourse and Influence Public Policy and Elections," University of Oregon; retrieved from www.uoregon.edu/~jbloom.
11. Rainie, *op. cit.*
12. For information on small donors and online donations during the 2004 election, see Joseph Graf et al., *Small Donors and Online Giving: A Study of Donors to the 2004 Presidential Campaigns*, Institute for Politics, Democracy, and the Internet in collaboration with the Campaign Finance Institute, March 2006; retrieved from www.ipdi.org.
13. *Ibid*.
14. *See* "Demographics of Internet Users," Pew Internet & American Life Project. The survey was conducted February 15–April 6, 2006. Retrieved from www.pewinternet.org.
15. *Ibid*.
16. In spite of the success of broadband adoption and Internet use in general among English-speaking Hispanics, the "content" dimension of the digital divide continues to be a major barrier for electronic advocacy and non-English speaking communities.
17. John B. Horrigan, "Home Broadband Adoption 2006, Home broadband adoption is going mainstream and that means user-generated content is coming from all kinds of internet users," Pew Internet & American Life Project, May 2006; retrieved from www.pewinternet.org.
18. Susannah Fox, "Digital Divisions: There are clear differences among those with broadband connections, dial-up connections, and no connections at all to the internet," Pew Internet & American Life Project, October 2005; retrieved from www.pewinternet.org.
19. Lee Rainie and John Horrigan, "A decade of adoption: How the Internet has woven itself into American life," Pew Internet & American Life Project, January 2005; retrieved from www.pewinternet.org.
20. Policy is often defined as "public" policy; however, private-sector policies exert important influence as well. A company's decision about where to locate facilities can have a major community impact. See PolicyLink's *Advocating for Equitable Development*, Winter 2004–5, and Advocating for Change (an online manual), at www.policylink.org.
21. *See* the third case study, "Peer-to-Peer Organizing and Fundraising: The Yes on 63

Campaign" in Section Three for more information.

22. For more information on Grassroots Enterprise, visit www.grassroots.com.

23. This table is adapted from "Communicating with Congress: How Capitol Hill is Coping with the Surge in Citizen Advocacy," Congressional Management Foundation, 2005; Figure 18, p.30; retrieved from http://www.cmfweb.org.

24. CitizenSpeak is a free email advocacy service for grassroots organizations that was inspired by the MoveOn.org email campaign. For more information, visit www.citizenspeak.org.

25. For more information about online faxing, *see* "Tools to Connect to Audiences and Enable Supporter Action" in Section Three.

26. For examples of email tracking, see "Tracking Email Effectiveness" in Section Three.

27. The "mass emailing software" used by the Schuylkill Campaign is known as ConstituentMail and is a service offered by Advocacy Inc. To learn more: www.advocacyinc.com.

28. HTML email offers organizations the ability to create more attractive, graphic-intensive email messages that look like web pages. HTML email provides greater control over format and layout, allowing emails to be designed with more compelling presentations.

29. Search engines are services for searching for information on the world wide web. The most popular search engines are Google (www.google.com), Yahoo (www.yahoo.com), and MSN (www.msn.com).

30. Domain names, also referred to as Universal Resource Locators (URLs), are the web addresses that Internet users enter to reach a website (e.g., www.policylink.org). Domain names can be registered and "owned" indefinitely as long as annual fees are paid to registrar companies. Only companies accredited by the Internet Corporation for Assigned Names and Numbers (ICANN) can act as domain name registrars. For a list of accredited registrars, visit www.icann.org/registrars/accredited-list.html.

31. Browser-based blogging software typically costs between $10 and $20 a month.

32. Really Simple Syndication is an XML-based form of content syndication that allows users to retrieve RSS "feeds" using free "feed aggregator" software. These feeds are usually headlines with synopses of content that is newly posted to a website. RSS feeds relieve regular visitors to particular websites from having to actually visit the website itself. Rather, RSS feeds in combination with feed aggregator software regularly update a user when new content is added to a frequently visited site. To learn more about RSS feeds, visit http://news.yahoo.com/rss. For a list of feed aggregators, visit www.newsonfeeds.com/faq/aggregators.

33. To learn more about "audiocasting" techniques, generally referred to as "podcasting," visit http://en.wikipedia.org/wiki/Podcasting.

34. See endnote 33.

35. A small-scale podcasting project can involve purchasing a microphone as the only hard cost with a range from very few to a few hundred dollars. More advanced podcasting production efforts can involve other equipment costs for recording and editing podcasts. For more information on creating podcasts, visit www.portablemediaexpo.com/podcastexpert/index.php?action=links&categoryid=5.

36. "Flash" refers to Macromedia Flash, which is both a program for authoring flash animations as well as the Flash Player, which can play Flash movies in web browser windows.

37. Also known as "point solutions" in industry parlance.

38. Although some standalone tools such as Microsoft Office (i.e., Microsoft Word, Excel, Access, and Powerpoint) come in the form of "suites," where the tools are able to function together, they are not primarily designed to work together in an "automated" way when it comes to sharing data.

39. "CRM is a set of processes and supporting technologies to acquire, retain, and enhance constituent relationships," where constituents are defined as "all people with some relationship to the organization—donors, funders, volunteers, clients, and all other people who help an organization to achieve its mission." To learn more, see Paul Hagen, "Creating the Relationship-Centric Organization: Nonprofit CRM," available at www.idealware.org/articles/relationship_centric_org_CRM.php.

40. Metrics are a system of ways to quantify and

periodically assess a process that is to be measured, along with the procedures to carry out such measurement.

41. A "hit" is a request for a file from the server. For example, when a user clicks on a link for information, the computer system requests the file from the web server.

42. An IP address (Internet Protocol address) is a unique number that devices use to identify and communicate with each other on a computer network.

43. In technical terms, click-through rates are the number of unique clicks as a percentage of the number of emails delivered. It is calculated using the following equation: Click-Through Rate = Unique Clicks/Emails Delivered (Sent—Bounced). A deficiency of this metric is the fact that it is typically reported by bulk email software using messages *delivered* rather than messages *opened*.

44. Net subscribers are calculated using the following equation: (# subscribers + new subscribers)—(bounces + unsubscribes).

45. "Narrowcasting" involves targeting "media messages" at selected segments of a public audience defined by values, preferences, or demographic attributes. To learn more about narrowcasting, visit http://en.wikipedia.org/wiki/Narrowcasting.

46. *See* "Technology Tools and Strategic Service Providers" coming up next in this section.

47. An ASP is a technology services company that offers software tools over the Internet for a recurring fee. The cost for ASP technology services can vary widely. For more information about ASPs and how they work, see Michael Stein and John Kenyon, *The eNonprofit: A Guide to ASPs, Internet Services, and Online Software*, available at www.compasspoint.org/assets/216_enonprofit.pdf.

48. All of the providers listed in Table 4 are for-profit technology companies except for Democracy in Action and Groundspring, which are 501(c)(3) nonprofit organizations.

49. *See* the list of vendors in Table 7, "Strategic Consulting Providers," in this section.

PolicyLink

Lifting Up What Works®

PolicyLink Headquarters:
1438 Webster Street, Suite 303
Oakland, CA 94612
Tel: 510-663-2333
Fax: 510-663-9684

Communications Office:
1350 Broadway, Suite 1901
New York, NY 10018
Tel: 212-629-9570
Fax: 212-629-7328

www.policylink.org