

Communicating *for Change*

6

Targeting Audiences with
New Communication Tools



Communicating for Change | Module 6: Targeting Audiences with New Communication Tools
Written by Judith Bell, Arnold Chandler, Glenda Johnson, and Josh Kirschenbaum of PolicyLink
In partnership with Lori Dorfman and Sonja Herbert of the Berkeley Media Studies Group
Copyedited by Kathy Barreto Designed by Lane+Lane, Inc.

Copyright © 2008 The California Endowment. No part of this work may be used, reproduced or transmitted in any form or by any means without the prior written permission of The California Endowment.

This manual was published by the Health ExChange Academy of the Center for Healthy Communities.

Special acknowledgments are given to the advocates and professionals who contributed to this manual including: David Chiu (Grassroots Enterprise), Leda Dederich (Scout Seven), Iris Diaz (Berkeley Media Studies Group), Allen Gunn (Aspiration), Nourbese Flint (Berkeley Media Studies Group), David Taylor (Radical Designs), Zach Rosen (CivicSpace Labs), Rob Stuart (Advocacy Inc), Maya Harris West (ACLU of Northern California), and Larry Eason (Mindshare Interactive). We would also like to acknowledge the Community Technology Foundation of California, especially Laura Efurd and Emy Tseng, for supporting the 2007 publication of *Click Here for Change: Your Guide to the E-Advocacy Revolution*, on which this work was based.

Communicating *for Change*

6

Targeting Audiences with New Communication Tools



Center for Healthy Communities

Foreword

The California Endowment recognizes that no single policy or systems change will achieve our goals. Rather, we believe that many policy, system and organizational changes are necessary at the local, state and national levels to achieve these goals. We also believe that everyone has a role to play and that all organizations can contribute to a change process.

In order to help build the capacity of our partners to elevate our collective goals and put forth solutions, The Endowment's Communications and Public Affairs Department and the Center for Healthy Communities have developed *Communicating for Change* as part of the Center's Health ExChange Academy. The *Communicating for Change* series is designed to provide advocates with the resources they need to effectively use media advocacy and other strategic communications tools to ensure that their policy goals for improving the health of California's underserved communities remain in the spotlight.

Special thanks are due to the team at Berkeley Media Studies Group and all the other partners who participated in the design of this curriculum, which we hope will help you amplify your voices for change.

Sincerely,

A handwritten signature in black ink, appearing to read 'Robert K. Ross', with a stylized, flowing script.

Robert K. Ross, M.D.
President and Chief Executive Officer
The California Endowment

Curriculum Introduction

The California Endowment's *Communicating for Change* training series will help advocates learn to engage the news media strategically. Whether the goal is increasing state funding for physical education programs or requiring hospitals to provide language access services, advocates can harness the power of the news media to amplify their voices, reach policymakers, and advance their policy goals.

This seven-session training series, which combines advocacy case studies with hands-on activities and group worksheets, will help advocates develop the skills to engage the news media effectively. The goal is to learn how media advocacy strategies can best support policy-change efforts to create healthier communities.

This manual is for participants of the sixth training session of the *Communicating for Change* curriculum, Module 6: *Targeting Audiences with New Communication Tools*. The topics for the other six training sessions are listed on the next page. We hope you enjoy this training and that it helps you reach your goals of creating healthier communities across California.

CURRICULUM OVERVIEW

Module 1: *Making the Case for Health with Media Advocacy*

Module 1 introduces how to use media advocacy strategically to advance policy. Participants will learn to recognize the news media's role in shaping debates on community health. They will clarify their overall strategy and learn how it relates to a media strategy, a message strategy and a media access strategy. This will be the basis for subsequent trainings.

Module 2: *Planning Ahead for Strategic Media Advocacy*

Module 2 takes participants through each step of developing a media advocacy plan: setting goals and objectives, identifying strategies and tactics, assessing resources, determining timelines and specifying who will do what. Participants will learn to integrate communications planning organizationally and plan for timely, proactive news coverage.

Module 3: *Shaping Public Debate with Framing and Messages*

Module 3 explains framing—what it is and why it matters—and helps participants apply that knowledge to developing messages in advocacy campaigns. Participants will practice framing a range of community health issues to support policy change.

Module 4: *Creating News that Reaches Decision Makers*

Module 4 explores different news story elements so participants can get access to journalists by emphasizing what is newsworthy about their issue. Participants will explore how to create news, piggyback on breaking news, meet with editorial boards, submit op-eds and letters to the editor, and develop advocacy ads.

Module 5: *Engaging Reporters to Advance Health Policy*

Module 5 gives participants intensive practice being spokespeople for their issue, including on-camera training. Participants will learn to anticipate and practice answering the tough questions reporters ask.

Module 6: *Targeting Audiences with New Communication Tools*

Module 6 gives participants a tour of new communications tools, including blogs, e-flicks and viral marketing, so they can tailor their advocacy communications to specific goals and audiences.

Module 7: *Training Allies in Strategic Media Advocacy*

In Module 7 those who want to train others in their organizations learn interactive techniques for teaching media advocacy.

Table of Contents

1. INTRODUCTION	1
2. DEFINING E-ADVOCACY	3
3. AUDIENCE AND TACTICS	5
4. TECHNOLOGY TOOLS: WHAT THEY ARE AND WHAT THEY DO	11
5. INTEGRATING TECHNOLOGY TOOLS IN THE ORGANIZATION	31
6. CONCLUSION	36
7. RESOURCES	40
8. WORKSHEETS	49

Introduction

1

For more than a decade, the Internet has been reshaping the way advocacy organizations mobilize people. New tools are influencing how organizations engage individuals in the policymaking process. The more traditional advocacy tools such as research, building coalitions, lobbying decision makers, attracting news attention, and organizing grassroots support are being augmented with new technology tools. This approach to advocacy—e-advocacy, or electronic advocacy—offers media advocates new opportunities for disseminating information and mobilizing supporters to advocate for change.

LEARNING OBJECTIVES FOR MODULE 6

By the end of Module 6 participants will:

- **Develop tailored e-advocacy strategies;**
- **Describe a range of e-advocacy tools;**
- **Select the best tools for their campaigns; and**
- **Describe what it takes to implement an integrated campaign.**

Organizations just like yours are rapidly broadening their reach using:

- **Viral marketing**, a tactic in which individuals spread advocacy messages via email to their friends and colleagues;
- **Short video and Flash™ animation pieces** that inform and persuade individuals to learn more about advocacy campaigns and to get involved;
- **Online communities** of engaged advocates who organize a host of offline events—house parties, rallies, and marches;
- **Technology tools** that enable individuals to engage in “peer-to-peer” organizing by recruiting their friends and colleagues to join them in advocacy efforts; and
- **Online fundraising activities.**

“Action is the catalyst that creates accomplishments. It is the path that takes us from uncrafted hopes to realized dreams.”

—Thomas Huxley, physiologist
(1825–1895)



The Digital Divide: Implications for E-Advocacy

Despite 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, according to the Pew Internet & American Life Project.

Even so, racial minorities, the poor, and the less educated are online in large numbers. In early 2006, according to Pew, 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 used the Internet, as well as 64 percent of those with only a high school diploma.

The more important digital divide now centers on what Internet users can do when online. With greater bandwidth and faster connections, they can more easily share large files, such as videos, and actively use technology-dense Web sites such as those with online political action centers. Without fast Internet connections, however, people may be able to get online but they can't take full advantage of Web resources.

It is essential, then, to close the digital divide so that every community in California can participate actively in the advocacy techniques that are increasingly popular in political campaigns and other social change work.

Until the divide is overcome, make sure that you rely on a range of advocacy strategies that can fully engage all communities.

For more information on closing the digital divide see <http://www.zerodivide.org/>



Using the Internet is merely one part of your overall policy and media advocacy strategy, not something independent. Whatever online tactics you pursue, their effectiveness depends in large part on how they are reinforced offline. There is no magic combination of Internet technologies that can turn a strategically flawed advocacy campaign into a success. A well-crafted overall strategy will always remain the essential ingredient for achieving change.

The technology tools described in this module will help you reach those that have broadband Internet connections at home and those using dial-up, as well others who are not yet online. An integrated online/offline approach combines the power of the online world with the enduring strengths of traditional offline strategies covered in other modules of this Health Exchange Academy training series. With e-advocacy you can generate visibility, engage 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. This manual and the accompanying training will help you use e-advocacy to amplify your voice and enhance your ability to create healthy communities.

Defining E-Advocacy

2

E-advocacy uses various 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 can:

- ***Expand the possibilities for framing policy problems for a wide audience;***
- ***Help build a broad base of online supporters for your goals;***
- ***Promote engagement and interaction among advocacy supporters;***
- ***Mobilize supporters to take action on behalf of a campaign;***
- ***Track and influence the news media to help shape public opinion; and***
- ***Increase pressure on policymakers to make change happen.***

A core set of technology tools is at the heart of successful e-advocacy campaigns. These include databases for storing information about audiences and supporters so you can contact them again, Web sites for presenting information and updating it on a regular basis, email tools for conducting outreach to online audiences, and a variety of other tools to help your supporters put pressure on policymakers. We discuss how to choose and use each of these tools later in this manual.

Online tools provide a number of important advantages for advocacy campaigns:

- **Reduced cost:** When resources are limited, Internet communications can lessen your need for paper, envelopes and postage, along with the staff or volunteer time needed to prepare and send letters to supporters and policymakers.
- **Increased speed and efficiency:** Email is one of the fastest ways to reach large numbers of supporters with new information and action alerts. This can be very useful in fast-changing campaigns.
- **Ability to reach a wider audience:** Potential supporters not already connected with your advocacy campaign can have an email message forwarded to them by a friend or colleague, a form of “viral marketing.” Your Web site can allow you to collect email addresses and encourage action by new supporters.

A well-organized e-advocacy effort with engaging content can turn passive viewers into active supporters and can even convince them to recruit friends to join your campaign.

→ **Interactive connections to supporters “24/7”:** A campaign Web site allows people to gather information and get answers to questions quickly and easily at their convenience.

→ **Faster response time:** Electronic communications are unmatched for enabling a swift response to breaking news and political developments. For example, bloggers can post information immediately and encourage supporters to participate in shaping the debate around your advocacy issue before the next broadcast news or newspaper deadline.

→ **Empowered supporters:** Perhaps the most compelling characteristic of e-advocacy is how it helps individuals form their own networks for an advocacy campaign. With “peer-to-peer” tools you can recruit, organize and help others take action on behalf of your policy goal. This social networking is a fast-growing component of many e-advocacy strategies.

→ **Online fundraising:** Whether the actual fundraising transaction takes place online or whether supporters send checks via postal mail, the Internet can help you reach untapped audiences to raise substantial amounts of money.

A well-organized e-advocacy effort with engaging content can turn passive viewers into active supporters and can even convince them to recruit friends to join your campaign. E-advocacy tools can thereby support your offline community-building and organizing efforts.

3

Audience and Tactics

The success of an advocacy campaign—whether using offline or online tactics or a combination of both—is determined by your organization’s ability to influence decision makers. As discussed in the *Advocating for Change* curriculum, a successful campaign typically requires:

- **Gathering the facts about your issue;**
- **Building support for change;**
- **Making a plan for action;**
- **Mobilizing constituents to take action on behalf of a campaign;**
- **Sparking strategic media attention;**
- **Generating adequate resources to run the campaign; and**
- **Persuading policymakers to take the right policy actions.**

TACTICS FOR BUILDING SUPPORT

Whatever the level of engagement you seek, there are a variety of tactics that can build a base of support. Combine traditional offline and online approaches depending on the needs and circumstances of your campaign.

Offline tactics for reaching supporters include:

- *Hand-distributing flyers*
- *Hosting house parties or public events*
- *Phone-banking*
- *Canvassing*
- *Generating news attention*

A mix of online and offline strategies provides a more robust approach to advocacy than a single plan.

Online tactics for reaching supporters include:

- *Building a Web site*
- *Sending emails and online newsletters*
- *Virtual phone-banking*
- *Peer-to-peer organizing*
- *Forwarding online video or animations*
- *Blogging and discussion groups*
- *Podcasting*
- *Online advertising*

In weighing online and offline options, the key is to choose the tactics that will best advance your overall strategy at each point of the campaign. The type and number of tactics that your campaign uses to build support among potential allies might depend on:

- **The time frame or length of a campaign:** The longer your advocacy campaign, the greater the opportunity to use a range of tools to build relationships with potential campaign supporters. For example, Web sites are relatively easy to change and so information can be updated and supporters can be given new opportunities to participate as the campaign evolves.
- **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 policy action. This could be done initially through a robust informational Web site with accompanying blogs and listservs to continually update a constituency on a new issue. Also, YouTube-style videos are helpful for personalizing and contextualizing old and new issues.
- **Resources of the campaign or organization:** Your ability to engage supporters online requires resources to cover the cost of purchasing technology tools and hiring or training staff to use them. However, the range of technology options available can make an effective online advocacy approach viable for almost any organization. Certain online tools can be especially well suited for organizations with limited funds for traditional advocacy tactics.
- **Receptiveness of supporters:** You must know your potential allies for the campaign to be truly productive. If your supporters do not

use the Internet and the aim of the campaign is to increase your supporter base, it might be more useful to focus on traditional offline advocacy strategies.

TACTICS FOR INFLUENCING DECISION MAKERS

The goal of your overall strategy is to influence the key decision makers you are targeting. Policymakers face ever-increasing amounts of information and tactics designed to sway them. As discussed in previous *Communicating for Change* modules, to be effective in this crowded environment you must frame messages in a compelling manner, clearly identify your target audience, and strategize about your tactics. You can deliver your message using a combination of offline and online tactics.

Offline tactics for reaching policymakers include:

- *In-person visits*
- *Testifying at public hearings*
- *Sending letters and faxes*
- *Making phone calls*
- *Organizing rallies or public events*
- *Contacting journalists to create news coverage*

Online tactics for reaching policymakers include:

- *Electronic letter-writing*
- *Online faxing*
- *Internet-organized constituent phone calls*
- *Internet-organized constituent “lobby days”*



Virtual Phone-Banking: The Sierra Club Goes Online to Reach Voters in Presidential Swing States

During the 2004 presidential election, the Sierra Club wanted to educate voters in swing states about the environmental records of George Bush and John Kerry. The key challenge for the campaign was mobilizing enough supporters in swing states. The organization decided that the best approach was to organize a virtual phone bank so volunteers could make calls from anywhere in the country. The Sierra Club partnered with Grassroots Enterprise, a technology vendor, to help callers from across the country contact thousands of swing state voters during the last few weeks before the election.

Supporters logged onto the Sierra Club Web site, where they downloaded scripts and call sheets with contact information for targeted voters. The talking points in the scripts were tailored to a particular voter’s locale. Providing this targeted information to a nationally distributed set of callers would have been 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. The Sierra Club could use callers in the states where they were most needed, not just where they happened to live.

After completing their outreach calls, supporters entered information on the Sierra Club’s Web site that described successful calls and identified the issues and challenges that emerged. They were also encouraged to share their experiences with other phone bank callers via a blog, which provided an interactive way to help build an activist community.

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

INFLUENCING THE DECISION MAKING OF CONGRESS

This table shows the percent of Congressional staffers who said how much influence each method of constituent communications would have on members of Congress.

METHOD OF CONTACT	STRONG INFLUENCE	NO INFLUENCE
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%

** 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>.*

Congressional staffers noted that personalized messages are much more powerful than form letters. Technology tools that allow your supporters to write their own messages become very important here. Staffers said that receiving 50 thoughtful email messages written in constituents' own words would be more effective than 300 identical form messages, even if delivered via postal mail. They told researchers at the Congressional Management Foundation that large numbers of personalized email messages, which are easy to organize and respond to, are preferable to an unwieldy onslaught of faxes that are difficult to respond to and consume costly office supplies.

The lesson is that a mix of online and offline strategies provides a more robust approach to advocacy than a single plan. As advocates for park access in Philadelphia found, the key is to balance the online and offline tactics that reinforce the campaign's overall strategy (see sidebar on next page).



Integrating Online and Offline Tactics: “Free the Schuylkill River Park” Campaign

Since 2004, a group of local activists has 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 using the park. The campaign began with one neighborhood association and grew into a coalition with community organizations from across the city.

From the beginning, the campaign saw resident engagement and mobilization as central to its overall strategy. Because of limited 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 exert pressure on the company. Then the campaign used the Internet to help secure the support of public officials—local parks commissioners, city council members, the mayor, U.S. Senators from Pennsylvania—and local media to apply additional pressure on the company.

The campaign began with a list of approximately 50 to 60 email addresses. 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 (www.citizenspeak.org) and an online faxing service. The electronic letter-writing (email) system used by the campaign provided a convenient way for local residents to express their views in support of the effort. Individual supporters were able to tailor scripted campaign statements to reflect their personal experiences and concerns. These statements were sent via email and fax to a variety of advocacy targets.

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 viral dissemination helped the campaign expand an organic base of committed supporters from 200 people to more than 750 online supporters. These emails were also tracked 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.

Mar 25, 2008 River Store | Search | Site Map | About Us | Contact Us | Support SRHA | Calendar of Events | View Cart | View Itinerary

SCHUYLKILL RIVER
NATIONAL & STATE HERITAGE AREA

Home Revolutionary River Places to Visit Things to Do Plan a Visit Resources

Explore the *Schuylkill River* and its surrounding communities.

Yuengling Brewery, Pottsville
Photo courtesy Greg Matosky

Revolutionary River Places to Visit Things to Do

2008 Heritage Area Grant Programs

Use Our 3-step Destination Wizard

With the 128-mile Schuylkill River as its spine, (pronounced SKOO-kill, Dutch for Hidden River), our Schuylkill River National and State Heritage Area is alive with a remarkable diversity of historic, recreational and cultural attractions. Along "the Revolutionary River," visitors can shadow the birth of our nation from the cobblestone streets and fabled landmarks of old Philadelphia to the huts

Map of Pennsylvania showing the Schuylkill River and various towns: ASHLAND, TAMMADA, POTTSVILLE, SCHUYLKILL HAVEN, PORT CLINTON, HAMBURG, KUTZTOWN, LEESPORT, WOMELSDORF, READING, WEST HEADING, DOUGLASSVILLE, PENNSBURG, PITTSBURGH, SCHUMERSVILLE.

continued on next page

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 Web site to post the newspaper article, along with photos and other campaign information. And the campaign created a blog to keep residents informed.

After the campaign supporter list had grown substantially, the organizers began using a "mass emailing" software service (ConstituentMail from www.advocacyinc.com). It allowed the organizers to send HTML emails to supporters (emails that could include graphics), to monitor the number of people who opened the emails, and to determine whether the emails were forwarded to others.

Using these tools, the campaigners could see that their base of support was strong. They decided to hold a campaign rally. Then they posted television coverage of the rally through a link from the campaign's main Web site. Perhaps the most innovative feature of the campaign Web site 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 Web site—to the CSX company.

The campaign successfully combined offline and online tactics:

- Setting up tables in the park to jumpstart the viral message dissemination;
- Reviewing emails of allies to find community voices to speak for the campaign;
- Tracking of emails to gain insight on advocacy opportunities; and
- Using tables and rally opportunities to increase Web site traffic and support for the campaign.

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 appear in 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 park issues well into the future.

Technology Tools: What They Are and What They Do

4

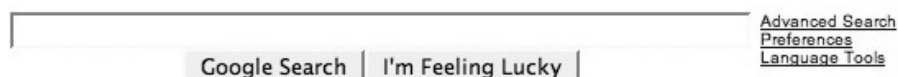
This chapter will get you started thinking about how to use different e-advocacy technology tools:

- **Web Sites:** This section provides suggestions for content on an advocacy Web site and tools to create an effective online presence. Describes blogs, online video and Flash™ animation, and podcasting.
- **Using Advocacy Email:** This section gives pointers for contacting allies through email newsletters and action alerts and for designing email messages.
- **Tools to Connect to Audiences and Enable Supporter Action:** This section details technology tools that are used to inform supporters and mobilize action.
- **Technology Tools and Strategic Service Providers:** This section describes the types of vendors and consultants that can help you use technology tools.

Visitors come to your virtual headquarters to get information about your issues and to get involved.

WEB SITES: CREATING THE VIRTUAL HEADQUARTERS

Many campaigns use a Web site as a central online presence. The site may also feature a blog, online video/Flash™ animation pieces, or audio podcasts. Whatever is featured, an online presence is a place for visitors to learn about your advocacy campaign 24 hours a day. Whether visitors find it through a search engine like Google or Yahoo!, or by clicking a link in a Web page, or by typing in the domain name or Web address (also known as a URL, like www.calendow.org), visitors come to your virtual headquarters to get information about your issues and to get involved.



The best advocacy Web sites are those designed with a clear understanding of their goals and audiences. They must present content that addresses multiple audiences—supporters, policymakers, news media, and potential funders—and provides clear navigation aids so all of these audiences can find what they are looking for easily. If your site’s central focus is to encourage action, then instructions and links for doing that should be prominently displayed on the home page and reinforced throughout the site.

Web sites can serve multiple functions such as:

- *Providing background information about your organization’s advocacy goals;*
- *Creating a venue for recruiting volunteers;*
- *Facilitating online political action;*
- *Providing access to news articles and press releases;*
- *Soliciting contributions; and*
- *Allowing supporters and interested site visitors to connect with each other.*

Your Web site should give people enough information to help them understand what the campaign is trying to accomplish and spell out ways in which they can participate. The following table describes the important content sections that you can include in Web sites to meet the informational needs of multiple audiences.

ADVOCACY WEB SITES: KEY CONTENT SECTIONS

COMPONENT	FUNCTION
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. The page can link to sub-pages with more detailed information about the issue or campaign history.
CONTACT US	Includes a physical address, phone number(s), and email addresses for the organization or campaign contacts.
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 Web sites.
CALENDAR OR SCHEDULE 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 either directly through the Web site or through a link to an online company.

Selecting the Virtual Address and Driving Traffic to It

After you have created a Web site, promote the Web address widely:

- *Announce the launch or redesign of the Web site via email;*
- *Ask recipients to forward the email to a friend;*
- *Publicize your Web site as often as possible by putting the address on all public communications: brochures, newsletters, action alerts, news releases, flyers, publications, letterhead, business cards, and the signature line of emails; and*
- *Ask your colleagues working on similar issues to include a link to your Web site on their Web site.*

Creating Engaging Content for the Web site

- **Build a user-friendly Web site.** Don't include so many bells and whistles that the site is confusing, visually distracting, or so large in size that potential supporters—especially those 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 Web site; it is the nature of the Internet. If someone visits your Web site three or four times over a few months and nothing has changed, that visitor is unlikely to return.
- **Use existing content.** Post material you produce in print form in a format and style suitable for the Web. This can include fact sheets, issue briefs, and research articles. You may also choose to include

links to reports and articles on your issue from elsewhere on the Web. These links should be explained with a sentence or two that shows how the linked information supports your advocacy goal.

→ **Include photography.** Use photography on the site to visually communicate your advocacy message and tell stories about campaign activities. Photos move people emotionally and encourage them to act. Photos can also capture your accomplishments such as rallies and news conferences.

→ **Consider blogs.** Blogs, short for “Web logs,” are informal online commentaries that can include pictures, video, and links to other blogs or Web sites. Free or fairly inexpensive (typically \$10 to \$20 a month), blogging software makes it easy to post breaking news related to your issues and receive additional comments from readers. Individual blog entries are usually in chronological order, with the most recent post listed at the top of the page. If you are creating a blog consider the tips below.

- **Conversational Tone:** *Since blogs are intended to engage an audience of regular readers, they are most effective when they are conversational. Blog posts are best when they are thoughtful, provocative, and concise.*
- **Readability:** *Make blog postings easily readable by using short, descriptive titles and one or two short introductory paragraphs to draw readers in. Provide a link to a longer version of the posting for those who wish to read further.*
- **Timeliness:** *The universe of millions of interlinked blogs on the Web, otherwise known as the “blogosphere,” is a fast-paced environment in step with the 24-hour news cycle. Writing about a breaking news development, therefore, requires quick turnaround to capitalize effectively on current events and help increase blog traffic.*
- **Syndication:** *Your campaign should ensure that the blog software service it uses supports syndication in the form of RSS (Really Simple Syndication) feeds. 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 Web page.*

→ **Try online video/Flash™ animation.** Online video can be a powerful way for you to communicate key messages as well as to generate viral dissemination by prompting viewers to forward the video to others. A popular online video or Flash™ animation piece can also increase the number of visitors to your Web site. The video should be promoted heavily through email and prominently noted on the campaign home page with a link to where it can be viewed. You can also post your advocacy video on Web sites such as YouTube and circulate the link to supporters.

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. With permission, campaigns can use videos produced by others (such as television coverage) by placing them on the campaign Web site or providing a link to the news station's site. In addition, advocacy campaigns have produced video documentaries of campaign activities such as speeches or rallies and later posted them to their Web sites.

When adding video content, make sure that it can be downloaded and viewed quickly. Typically, video clips should be no more than two to four minutes long and require a minute to download. Videos should be edited to be crisp, filled with information, visually interesting, and clearly communicate campaign messages. As always, know your target audience. Is your video aimed at mobilizing supporters and/or convincing policymakers?



→ **Consider podcasting.** Podcasting is a way to disseminate audio content over the Internet. Using podcasts, you can easily distribute audio recordings of speeches, interviews, or news updates 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, your supporters can also listen to a podcast on their computer, by streaming directly from a Web site. One advantage of a podcast is that if your supporters do have a portable device they can download the content and listen to it “on the go.”

ODEO ★

BROWSE MY AUDIO

Millions of MP3s and 1000's of audio channels—podcasts, music, and more. Listen, download, subscribe... FREE

Currently Starring

 <p>nwamajik ★ Cproject - Nou libere ★ Franel feat. Jah B - Jugemen... ★ BAD - Mande pou mwen</p>	 <p>Crema ★ Cascada - A Never Ending Dream ★ Chris Brown - Wall to Wall ★ Hypnotized - Plies feat. Akon</p>
---	---

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.

Users who subscribe to an ongoing or recurring podcast are automatically notified of new podcasts through free downloadable software programs known as “feed aggregators.” Aggregators offer the means for listeners to stay updated about new audiocasts without having to visit the Web site. However, audio listeners do not have to have aggregator software to listen to audio podcasts. It is just as easy for you to post an audiocast to a blog or Web site and notify your supporters via email that a new one is available. Web sites such as Odeo host many such podcasts. Services such as iTunes provide access to podcasts such as news programs from NPR.



Tracking Web Site Effectiveness

There are various ways to monitor and measure activity on your campaign Web site. Web site metrics (data) can help your campaign identify when the Web site received the most visitors, which documents are being downloaded, what pages are of most interest on the site, how visitors are arriving at the Web site, and whether they are following links and taking action.

The primary tool for monitoring these metrics is known as “server reporting” or “server log analysis” software. This tool generates Web site statistical reports that capture such information as the number of site “hits” (a “hit” is when someone clicks on a link on the site), the number of unique visitors, and how long visitors are staying on your site. Organizations that currently have their sites hosted by integrated toolset providers (see the list in the Resources section at the end of this manual) can obtain these reports directly from their service provider.

Server reporting software can help you track:

Web page views: Tracks the number of times a user views a page; allows your campaign to identify which pages on the site are viewed most. It is important for assessing how effectively your campaign is driving user traffic to your Web site.

Document downloads: Determines which files are being downloaded from the Web site. You can monitor how often research reports, issues briefs, flyers, etc., are being downloaded by Web site visitors.

Length of site visit: Tells how long a visitor stays at the Web site. For campaigns, it is a good indication of how rich and engaging the content is.

How visitors arrived at the site: Determines whether users found the Web site through a search engine, by clicking a link in an email, from another Web site, or typing in the domain name. Knowing how visitors arrived at a campaign's Web site is key to determining and evaluating the effectiveness of Web site promotion strategies.

Where visitors leave the site: Indicates 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: Determines how many visitors are new to your Web site 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.

Actions taken and conversion rates: Calculates the percentage of people who completed an action on your Web site out of the total number of unique visitors to the Web page where that call to action is available. You can develop these percentages, or "conversion rates," for different actions, including making donations, signing a petition, registering for an event, or sending an email to a decision maker.

Monitoring this information over time allows you to identify Web site activity around specific external events such as news coverage or rallies, as well as general trends in Web site usage, including specific details about page views, site visitors, responses to calls to action, and overall visitor or supporter behavior. Together the data will help you be more strategic in designing your Web site and integrating it into your overall advocacy strategy.

USING ADVOCACY EMAIL

Email is a fast and inexpensive way to communicate with a large number of people at one time. It can be used for one-on-one exchanges, group discussions, distributing information, and getting people involved. One of the most popular types of e-mail in advocacy campaigns is action alerts (see sidebar above).

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

→ **Collect email addresses at every opportunity.** Add a "sign-up" box on every Web page and a way for your supporters to email the campaign from the Web site. When using offline tactics, provide a sign-in sheet or membership form to capture email addresses. Start gathering the information right away, even if you are not ready to begin online communications.



Sending Action Alerts

Action alerts are emails that urge supporters to take a specific, 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, 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. 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 or send it to their junk mail folder directly. “Reply to” addresses should include institutional names, such as actioncenter@thisorganization.org, where possible.

Design the email message in HTML. HTML emails look like a graphic Web page and are more attractive than text emails. They increase the likelihood that recipients will read an email and take the requested action. Depending on your audience, you may want to also have a “text only” option, which is easier to download and view on slower or older computers.

Personalize the message. Personalizing action alerts by including a recipient’s first name in the greeting generates a greater sense of familiarity than a form message.

Keep the text short and focused. Action alerts should be easy to scan, with bulleted points. Use accessible, clear language; no jargon. Ask for a specific, concrete action. If the message is complicated, people will not take action.

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

Highlight the urgency of the alert and include a deadline for action. Let people know the time frame in which to respond and when the time for action has passed. Indicate 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 Web site.

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 appear 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.

→ **Encourage your supporters to go online**, especially those likely to respond to a call to action.

→ **Plan and test email communications.** You 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 such as rallies, convenings, or house parties, craft a plan for pre-event email publicity and post-event email follow-up as well. Emails should be pre-tested prior to distribution to an entire email list. Send them to your staff or a small set of coalition members to be sure they arrive in the proper format. Check for formatting, spelling errors, and broken links.

When you plan to ask the recipients to take action, use more than just a single email blast. Instead, send a sequence of emails designed to encourage and energize activists before the call to action expires. A possible message sequence could include:

- *A call to action, outlining the advocacy goals and the time frame for your supporters to take action.*
- *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 get their friends and colleagues involved.*
- *An email message updating your supporters on the progress and next steps of the campaign.*

All of the emails should include a link to the campaign Web site where your supporters can get more information. You can also have a section with all current and past action alerts for reference.

→ **Manage expectations and cultivate relationships.** Regular email communication is about cultivating relationships. The frequency of emails depends on how well your online campaign has built and managed the expectations of email recipients. Building expectations begins when recipients first add themselves to a list through a Web site or are added by your organization as a result of offline contact. Tell your participants—either on the Web site when they sign up or in an introductory email following offline contact—how frequently (e.g., daily, weekly, or monthly,) they can expect to receive email communications.



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 of no more than four lines each. Announcements or new items requiring lengthier information should link to the Web site.

Make them interesting and easy to read. Clear headings allow people to scan a newsletter and focus on the parts they are most interested in. A table of contents can also help focus readers. Some campaigns put the content of the newsletter in the text of the email instead of an attached document, since that may increase readership and keep the file from ending up in the junk mail folder. Photos are nice, but use them sparingly because they may be difficult for some people to download.

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

- **Be discreet with group email.** When using email programs 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. If your email list becomes large, you can contract with a service provider to send alerts for you (see Resources, p. 40).
- **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.
- **Connect email with Web content.** Email strategies are most effective when they are short. You don't have to say everything in the email—use email to link to content posted at your organization's Web site, particularly rich media content such as online videos, Flash™ animation, or audio content.



Tracking Email Effectiveness

You can determine 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 Web site for further action, and the percentage of emails that were forwarded to others. Different technology tool providers (see Resources at the back of this manual) can help you set up email tracking systems. They will use these data to assess effectiveness by tracking:

Open rate: 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.

Click-through rate: Measures the number of email recipients that “clicked through” to your campaign Web site from a link in the body of an email message. This could entail clicking through to take action, making an online donation or viewing an online video.

Bounce rate: Assesses the quality of an email list and determines the email delivery rate; specifically, how many email addresses are wrong. It is important to track and remove faulty email addresses because repeat bouncing emails can get flagged as spam by an Internet service provider, which could result in blocking all emails from your organization at that recipient’s address.

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 your campaign email list. This is important to track because it helps you 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 your campaign email list. Tracking the rate of new subscribers can help gauge the effectiveness of specific outreach tactics.

Forward rate: Allows your 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 your campaign Web site.

Monitoring these trends can help you assess your email list and detect signs of “list fatigue” among current subscribers. Identifying and responding to list fatigue is an important requirement for conducting effective, long-term e-advocacy campaigns. You want to keep supporters engaged, and the first step is keeping them online with your campaign.

TOOLS TO CONNECT TO AUDIENCES AND ENABLE SUPPORTER ACTION

Different technology tools serve different functions and strategic purposes. They can help you increase your base of support, keep your supporters regularly informed and updated, raise funds, manage and engage your members and volunteers, provide ways for supporters to take action, and help supporters recruit and organize others. The following table lists technology tools, along with brief descriptions of how they can be used to support advocacy campaigns.

TECHNOLOGY TOOLS

TOOLS	DESCRIPTION
WEB SITE CONTENT MANAGEMENT SYSTEMS	Maintaining and updating Web site content can prove difficult for organizations that lack the expertise or staff to update their Web site's HTML code on a regular basis. Content management systems allow organizations to add and update content with user-friendly templates that even non-technical users can master.
BULK EMAILS	Unlike the simple email programs used in day-to-day communications (e.g., Microsoft Outlook, Eudora), bulk email tools are designed for very large email lists. They are available as a monthly service and are provided by companies that rent bulk email tools to nonprofits over the Internet. They typically cost a fee to set up and involve monthly fees of between \$20 and \$100. Bulk emailers can track whether email recipients are opening their emails, whether they are clicking through on links in the body of email messages, and whether they are forwarding email messages to others (see sidebar on Tracking Email Effectiveness).
DONATION PROCESSING AND DONOR TRACKING TOOLS	These tools typically provide for credit card and check processing as well as recurring automatic payments, and often include features for tracking donor data.
ELECTRONIC LETTER-WRITING TOOLS	Email-writing campaigns usually involve the creation of a form on a campaign's Web site where constituents can add their contact information and tailor a suggested email message that will be sent to a policymaker.
ONLINE LETTERS TO THE EDITOR	This tool is nearly identical to electronic letter-writing tools except that targets are usually at newspapers or other print media rather than policymakers. This tool involves providing a Web site 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.

ONLINE TOOLS TO ORGANIZE OFFLINE GATHERINGS	<p>Some technology vendors offer tools that enable 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.</p>	<p>.....</p> <p>.....</p> <p>.....</p>
ONLINE PETITIONS	<p>Online petitions 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 expand its email list through peer-to-peer viral message dissemination.</p>	<p>.....</p> <p>.....</p>
ONLINE POLLING AND SURVEYS	<p>A variety of tools are available to conduct online surveys, ranging in price from \$20 a month with no start-up fees to several hundred dollars a month with significant start-up costs.</p>	<p>.....</p> <p>.....</p>
VIRTUAL PHONE-BANKING	<p>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.</p>	<p>.....</p> <p>.....</p>
ONLINE COMMUNITY BUILDING TOOLS	<p>These allow organizations to offer Web site discussion forums, chat rooms, and social networking so supporters can connect with each other to discuss issues important to an advocacy campaign, including on blogs.</p>	<p>.....</p> <p>.....</p>
CONTACT RELATIONSHIP MANAGEMENT (CRM) TOOLS	<p>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.</p>	<p>.....</p> <p>.....</p>
PEER-TO-PEER ORGANIZER FUNDRAISING TOOLS	<p>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.</p>	<p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>
RSS FEEDS	<p>Really Simple Syndication allows users to retrieve RSS “feeds” using free “feed aggregator” software. These feeds are usually headlines with synopsis of content that is newly posted to a Web site. RSS feeds spare regular visitors to particular Web sites from having to actually visit the Web site itself. Rather, RSS feeds in combination with feed aggregator software regularly update a user when new content is added to a frequently visited site.</p>	<p>.....</p> <p>.....</p> <p>.....</p>

Your choices of which tools to incorporate and when to use them will depend on your resources as well as your overall strategy. As a coalition of mental health supporters learned (see "Yes on 63" sidebar), peer-to-peer organizing can equip supporters with the necessary technology tools to raise funds and to meet its advocacy goals.

Tools that Stand Alone vs. Tools that Are Integrated

Some major differences among existing technology tools have implications for how you design your e-advocacy strategies. One such difference is between tools that are designed to work independently as "stand-alone" 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 stand-alone software tools (also known as "point solutions"). "Stand-alone" means that the technology tools are designed to work by themselves as independent software products, such as databases like Filemaker Pro or Microsoft Access; email tools such as Microsoft Outlook or Eudora; and word-processing applications such as Microsoft Word.



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 comprised 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. The online strategy was largely devoted to raising funds to finance television advertising that the campaign would need 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 develop 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 Web site.

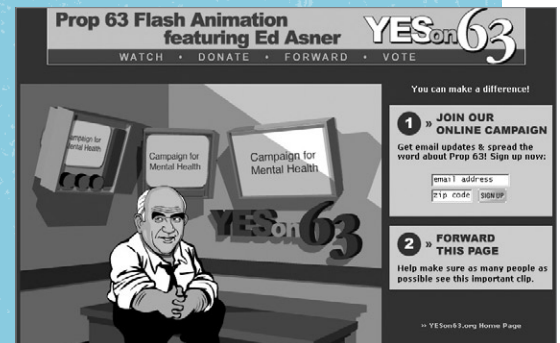
2. Its target audience was not tech-savvy: Because the members of the large organizations in the “Yes on 63” coalition tended to use the Internet less frequently than the general population, the campaign knew a strategy that relied heavily on recruiting support through the Internet would not be very 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 increase 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 Web site and sent weekly emails to supporters about campaign-related developments.

Following its initial efforts to raise 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 the campaign Web site. This Web-based system allowed supporters to have their own mini-Web sites, where they formed teams and accepted online donations. Each member of the team had an individual Web page 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 11-month campaign, organizers began to use traditional campaign strategies to bolster the effectiveness of online fundraising. They hired five field staff members, spread across the state, to meet with organizations and get them to commit to forming online teams.

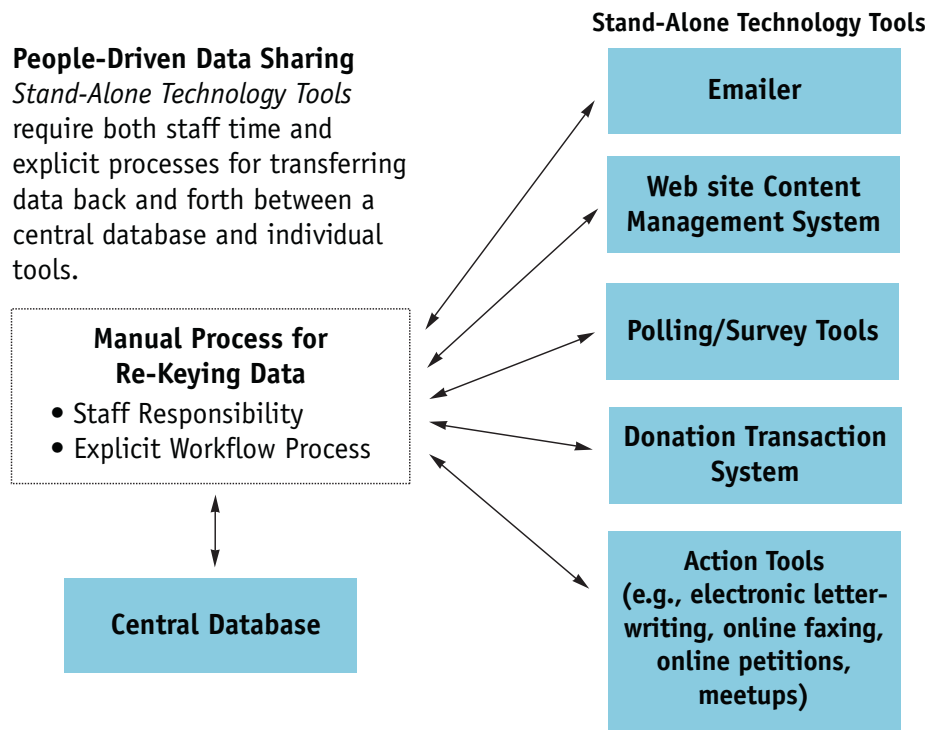
This strategy worked particularly well in recruiting several organizations to create online fundraising teams. As much as 40 percent of the funding generated through online teams was transacted through face-to-face interactions. The Internet merely provided an organizing vehicle and a shared Web space 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.

Technology tools used for advocacy can also come in this stand-alone form. The Resources section at the end of this manual lists some of the more prominent stand-alone technology tools and their providers.

Stand-alone technology tools are usually offered by separate vendors and can be combined as they suit the particular needs of your 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. Integrated toolsets can automatically share data (such as which of your supporters frequently check the Web site or forward action alert emails). This can make it easier for you to track the effectiveness of your online campaign with your supporters as well as to target your communications.

In integrated toolsets, the tools work together as an integrated system. They are able to “talk” to each other because they share a central database. Using integrated tools you can track the effectiveness of your online strategies across multiple technologies, including Web sites, email, donation tools, electronic letter-writing applications, etc. Integrated data can inform your campaign about which supporters are most likely to answer an email call to action, make a donation, or help organize a house party. The Resources section lists technology tool providers that offer integrated toolsets.

STAND-ALONE TECHNOLOGY TOOLS: THE A LA CARTE OPTION



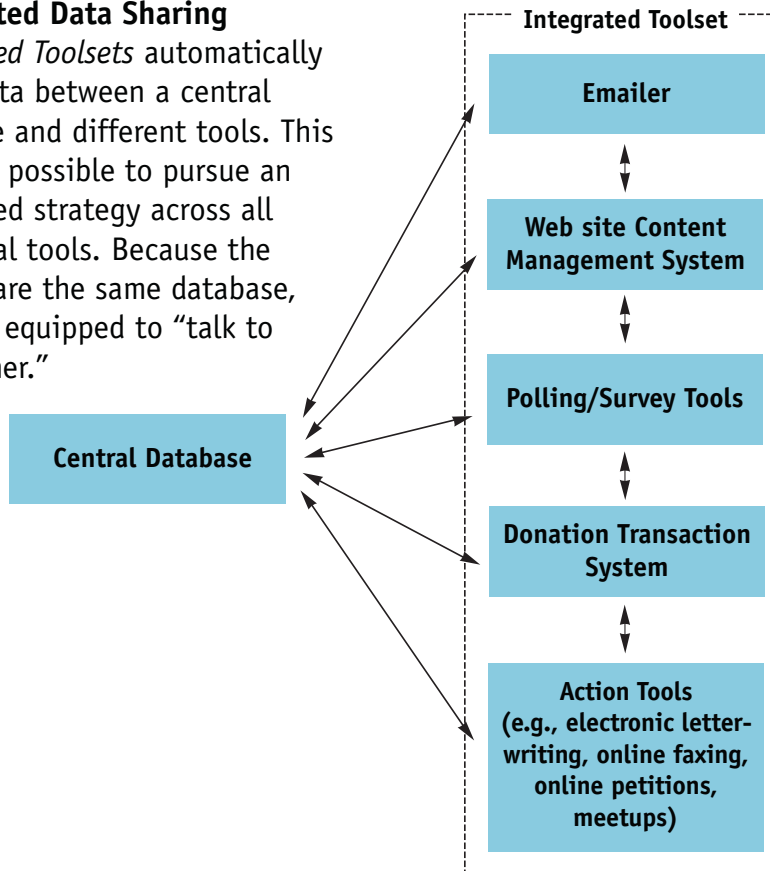
Courtesy of KQED

Despite their many benefits, there are drawbacks to integrated toolsets. Commercial integrated toolsets are generally costly to set up and have high ongoing fees. They require conversion of existing data, systems and business processes in order to use them to their full capability. However, if you have the resources to use integrated toolsets in your advocacy campaigns, they can help you to be more strategic in your online advocacy. (See sidebars on Tracking Web Effectiveness and Tracking Email Effectiveness.)

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.”



Courtesy of KQED

Tracking tools can be powerful, as the “No on 54” campaign learned when it succeeded in effectively disseminating key campaign messages to specifically targeted audiences, ultimately defeating the proposition (see sidebar on next page).



“Narrowcasting” 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 many state-funded programs. The groups were concerned about the ramifications of the initiative on conducting public health research, monitoring discrimination and providing education.

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 (see Resource section) to develop and implement an Internet strategy that would get out the “No on Proposition 54” message to help raise support and money for the campaign.

The coalition used a viral multimedia Internet strategy to launch the online campaign. The main objective 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 designed for specific racial and ethnic segments of the California electorate.

The campaign created a series of four Flash™ animation pieces, incorporating key messages tailored to address the concerns of African-American, Asian-American and Latino voters. The messages were “narrowcast,” or focused on specific issues that mattered to the targeted community.

After creating the Flash™ animations and posting them to a Web site, the coalition sent 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 include the racial or ethnic information they needed to target the email blasts. So the ACLU asked allied organizations, representing particular racial or ethnic communities, to send out emails to their lists containing links to the targeted Flash™ animations.

Recipients of the email messages were asked to forward them to friends and colleagues. Over several weeks, the campaign sent out six different email “blasts” to approximately 40 to 50 email lists of allied organizations.

NO ON PROP 54 **Vote NO on OCTOBER 7**

*Don't Let Them Take This Data Away.
Help Us Defeat Prop 54!*

Forward To
A Friend

Join the
Movement

Contribute to
Defeat 54

The campaign tracked emails and monitored the percentage of recipients who opened the email messages, 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” coalition also used “micro-campaigning” as an online fundraising strategy. Micro-campaigning involves sending out email fundraising pleas with a particular goal (e.g., getting an ad placed on the air or hiring a field organizer). The coalition sent out email blasts pointing to a digitized version of a television ad that it had aired a few times in the state, requesting that recipients make a donation to keep the ad on the air.

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.

43% Latinos do not own homes



El Trabajo y La Vivienda: Many Latinos still have difficulty finding good jobs and affordable housing.



PROP 54: BANS DATA RELATED TO JOBS AND HOUSING

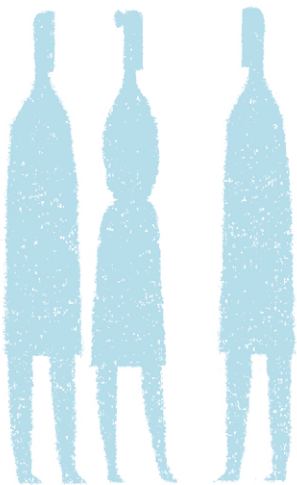
TECHNOLOGY TOOLS AND STRATEGIC SERVICE PROVIDERS

Many organizations need help choosing software tools for managing Web sites, email lists, and other online tools. Service providers for e-advocacy are as diverse as the organizations that engage in advocacy. Either commercial or “open source” providers can help you determine which tools will meet your strategic advocacy needs. See the Resources section at the back of this manual for links to each of these types of providers:

- **Commercial Technology Tool Providers** rent integrated technology software services to nonprofits over the Internet for a monthly fee. These tools differ significantly in price and function, are usually easy to set up, and have the advantage that the vendor (known as the Application Service Provider or ASP) is responsible for hosting and maintaining the technology. But many of these applications are “one-size-fits-all” and may not have the flexibility you may need over time.
- **Open-source Technology Tool Providers** help nonprofits use software tools that are freely available to the public under noncommercial licensing agreements. This software can usually be easily modified if your

organization has the technical know-how. If not, you can engage third-party service vendors (listed in the Resources section) who will set up and customize open-source software.

- **Technology Strategic Consulting Providers** specialize in blending online activities and offline strategies such as media work, field organizing, and polling. They offer strategic advice on your advocacy campaign along with the technology tools.
- **Strategic Consulting Providers** are technology and communications consultants who do not sell technology tools themselves, but help organizations use technology tools provided by commercial vendors and open-source developer communities.
- **Intermediaries and Research Institutes** conduct research, provide Web-based resources, hold conferences, and provide training to build the online capacity of nonprofit organizations.



Integrating Technology Tools in the Organization

5

Advocacy organizations of all sizes and resources are integrating online and offline strategies. They are changing their strategies and retooling their organizations to enhance their effectiveness. To integrate technology tools into your advocacy strategies, consider how your organization:

- ***Collects, stores, maintains and processes data so that the tools can be used to connect with supporters online;***
- ***Incorporates staff (including communications, policy, fundraising, and field staff) in the design and maintenance of the organization's Web site to keep content fresh and supportive of evolving advocacy goals;***
- ***Monitors the online actions of those who receive the organization's email communications and visit the Web site so you can refine and improve your strategies;***
- ***Uses online communications to support offline events;***
- ***Uses offline events and print materials to increase visitors to the Web site and increase the organization's base of supporters;***
- ***Works collaboratively with other organizations to develop shared online communications strategies to empower and unify supporters and stakeholders; and***
- ***Contacts and influences decision makers.***

Simply acquiring technology tools does not equip an organization with the means to use them strategically. Many organizations have to adapt their practices and build their staff skills in order to use technology tools effectively. The challenges they face may include:

- ***Costs of purchasing technology tools, along with the "switching costs" of integrating technology into their current advocacy strategies;***
- ***Reluctance of organizational leadership to make significant investments in technology; and***
- ***Compartmentalization of technology strategy and data collection within separate departments of an organization (e.g., fundraising, member management, communications, and organizers).***

The support of your organizational leadership is critical to building an effective online strategy.

Advocacy organizations can overcome barriers and pursue effective online strategies by taking a few careful steps.

Strategy and Planning

As with all advocacy campaigns, your decisions and actions should be determined by your overall strategy. So, before considering technology choices, you should first set clear objectives and develop a coherent plan of action that furthers your overall goals. Then decide how you will acquire the technology tools you need and determine whether and how online supporters will be recruited and how those relationships will be managed over time. E-advocacy should be driven by a series of short-term, intermediate and long-term goals that reflect the different stages in your overall advocacy campaign, as well as your organizational capacity needs, resources and staffing.

Leadership and Stakeholder Buy-In

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

In addition to leadership support, other stakeholders within your organization or coalition (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 your organization's Web site 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 and offline communications and fundraising; and*
- *Streamlining the development and dissemination of email messages so that they are consistent with and reinforce offline messages and your overall strategy.*

A sound planning process can clarify how different members of your organization can contribute to the implementation of the online strategy.

Adapting Organizational Processes

Your group's ability to support online communications has to do with staffing, organizational processes, and the internal allocation of resources. 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, how they develop content and the frequency with which they add it to the organization's Web site. This approach is much less effective than one led by cross-functional teams as part of an organization-wide online communications approach.

For example, policy or program staff and community organizers must help develop email content that describes and frames the policy implications of an issue, select the audiences who will receive the email, and decide the timing to take advantage of strategic opportunities. But others in the organization will also be involved: other program staff who work on organizational communications, technical staff who send the emails, and support staff who respond to contacts from the general public and enter data collected offline into your databases.

Cross-functional team approaches support online communications well because many of the components of effective online campaigns fall outside the boundaries of traditional job functions. More organizations are creating staff positions specifically devoted to online strategy or online fundraising to build their internal capacity and to use technology tools for innovative approaches to e-advocacy.



The Ella Baker Center: An Organization Readies Itself 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 online 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, attracting news attention to its 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 to reform juvenile justice systems, a Web site 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, meant that the Web site was a vital way to bring attention to the policies affecting incarcerated youth. Staff posted photos on the Web site that reflected their work, including photos from rallies and other activities.

The center uses email 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. It sent an email call to action, with a tailored message 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. The center initiated an online petition it sent to the governor's office, asking him to close youth prisons. Through the online petition, the center was able to double the number of people on its email list. The email blast generated viral action as supporters forwarded the message to others and received attention from officials within the system.

But the Internet is only a part of the Ella Baker Center's broader advocacy strategy. Organizing lobby days involves getting supporters and authentic voices, such as parents of incarcerated youth, to visit legislators. Parents are organized through phone, regular mail and house visits. Where it is



not effective to reach them through online tactics, the center has used e-advocacy tactics to reach others who will attend rallies, thereby bringing attention to the issues. The center has shown that even though an organization's main constituent base may not be online, the Internet can still be of value in advocacy work.

To continue these successes, the center's leadership 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 center hired an online communications director as well as full-time support staff dedicated to that function. It allocated time for senior staff writers to develop online content, and it tightly coordinated between the organization's online strategy team and its communications and policy staff.

The online communications director manages email campaigns and 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 gaining 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.

6

Conclusion

The potential of e-advocacy to mobilize public will and encourage people to engage with decision makers is far-reaching.

The potential of e-advocacy to mobilize public will and encourage people to engage with decision makers is far-reaching. But that potential will only be realized when online tactics are incorporated effectively into the core of traditional policy and media advocacy strategies. Advocates can realize this potential when they:

Ensure leadership and staff buy-in.

Leadership and staff support for using and integrating e-advocacy into your 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.

Develop a clear advocacy strategy.

An overall strategy is the first step for any advocacy campaign. E-advocacy can be an integral part of that strategy. Technology tools should not guide your organization's strategies, but your overall strategy should dictate which technology tools and tactics should be employed.

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 members 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 involve complex integrated toolsets with commercial software tools or they can involve stand-alone 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. Your organization—whether large or small—should conduct e-advocacy

7

Resources

Sources Cited

This manual is based on *Click Here for Change: Your Guide to the E-Advocacy Revolution* by PolicyLink and the Community Technology Foundation of California (download the report from www.policylink.org).

Books and Online Manuals

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

Herbert, S. "Harnessing the Power of the Internet for Advocacy and Organizing," *Community Organizing and Community Building for Health*. Rutgers University Press, 2005.

Guides 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

Technology Tool Software

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

Salesforce

www.salesforce.com

Bulk Emailers

Vertical Response

www.verticalresponse.com

Constant Contact

www.constantcontact.com

GraphicMail

www.graphicmail.com

My Emma

www.myemma.com

Jango Mail

www.jangomail.com

Mailer Mailer

www.mailermailer.com

Blue Hornet

www.bluehornet.com

Email Labs

www.emailabs.com

Web Site Content Management Systems

Wild Apricot

www.wildapricot.com

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

Tapestry

www.etapestry.com

Democracy in Action

www.democracyinaction.org

Paypal

www.paypal.com

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

RSS Feeds

To learn more about RSS feeds, visit <http://news.yahoo.com/rss>. For a list of feed aggregators, visit www.newsonfeeds.com/faq/aggregators

Text Messaging

Mobile Active

www.mobileactive.org

Web blogs

Typepad

www.typepad.com

Blogger

www.blogger.com

Blogher

www.blogher.com

Technorati

www.technorati.com

Blogging while brown

www.bloggingwhilebrown

Daily Kos

www.dailykos.com

Social Networking

Kick Apps

www.kickapps.com

Myspace

www.myspace.com

Facebook

www.facebook.com

LinkedIn

www.linkedin.com

Friendster

www.friendster.com

Second life

www.secondlife.com

Podcasts

Odeo

www.odeo.com

Video/photos

Flickr

www.flickr.com

YouTube

www.youtube.com

Graphic Design Services (web, logo)

E-Lance

www.elance.com

Technology Software Providers

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

Technology Tool Providers

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

Grassroots Enterprise

www.grassroots.com

Groundspring

www.groundspring.org

Kintera

www.kinterainc.com

Local Voice

www.localvoice.com

Technology Vendors and Consulting Firms

Commercial Technology Vendors

CitySoft

www.citysoft.com

Convio

www.convio.com

Democracy in Action

www.democracyinaction.org

Kintera

www.kinterainc.com

Local Voice

www.localvoice.com

Open-Source Technology Vendors

Advocacy Inc

www.advocacyinc.com

Capitol Advantage (and E-Advocates)

www.capitoladvantage.com

Grassroots Enterprise

www.grassroots.com

Strategic Consulting Providers

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

Intermediaries & Research Institutes

Aspiration

www.aspirationtech.org

Alliance for Justice

www.allianceforjustice.org

Berkeley Media Studies Group

www.bmsg.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

Institute on Politics, Democracy, and the Internet

www.ipdi.org

NP Action from OMB Watch

www.npaction.org

NTEN

www.nten.org

Personal Democracy Forum

www.personaldemocracy.com

PolicyLink

www.policylink.org

Worksheets

8

BALANCING ADVOCACY APPROACHES	50
SCENARIO 1: LOCAL CAMPAIGN ON TOXIC AIR POLLUTANTS	51
SCENARIO 2: RURAL CAMPAIGN FOR BASIC INFRASTRUCTURE	52
SCENARIO 3: STATEWIDE CAMPAIGN ON ACCESS TO HEALTHY FOOD	53

Balancing Advocacy Approaches

INSTRUCTIONS:

Using the advocacy scenarios on the following pages, discuss what types of online and other advocacy tactics you might use to achieve your goals.

	ADVOCACY TACTIC OR TOOL	WHY CHOSEN
ONLINE TOOLS		
OTHER TACTICS		

SCENARIO 3: STATEWIDE CAMPAIGN ON ACCESS TO HEALTHY FOOD

You lead the California Coalition against Food Deserts and your main objective for 2008 is to create a new statewide fund to bring health food retailers to neighborhoods without access to healthy and fresh foods. Research has demonstrated that a \$20 million fund could help secure up to 50 new grocery stores in underserved communities. You have a powerful senator who will sponsor the bill, but there is opposition from the governor, who has threatened to veto the legislation. What online and offline tactics will you employ to garner support across the state and reach policymakers?

OFFLINE:

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

ONLINE:

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....



Center for Healthy Communities