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

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

This section describes each of these technology components:

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

Creating the Virtual Headquarters

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

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

Creating the Campaign Website

Websites can serve multiple functions: provide background information about the organization or coalition and its campaign issues, create a venue for recruiting volunteers, facilitate online action, solicit contributions, and allow supporters and interested site visitors to connect with each other. A website must give people enough information to make them knowledgeable about the issue, help them gain an understanding of what the campaign is trying to accomplish, and spell out ways in which they can participate and lend their support.

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

Selecting the Virtual Address and Driving Traffic to It

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

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

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

Figure 2.

Main Content Sections for an Advocacy Website

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

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

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

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

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

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

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

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

Donations Page: allows donors to contribute to the campaign.

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

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

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

Creating Engaging Content for the Website

Use existing content

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

Photography

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

Blogs

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

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

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

Online Video/Flash Animation

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

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

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

Podcasting

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

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

Figure 3.

Sending Action Alerts

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Using Email

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

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

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

FIGURE 4.

Sending Email Newsletters to Build Support

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

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

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

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

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

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

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

1. Preparing and sending a call to action, outlining its goals and the time frame for supporters to take action.

2. Sending a follow-up "thank you" message to activists who complete the action requested. That follow-up message could also include a prominent request for supporters to forward the message to others.

3. Sending an email message updating supporters on the progress and sending out additional calls for more individuals to take action to help achieve the goal.

4. Sending an email to supporters informing them of the outcome of the campaign and the ways in which their efforts helped.

- **Manage Expectations and Cultivate Relationships.** Regular email communication is a relationship cultivation activity. The frequency of emails depends on how well the online campaign has built and managed the expectations of email recipients. Part of building expectations begins when recipients first add themselves to a list through a website or are added by the organization as a result of offline contact. Constituents should be made aware—either on the website when they add themselves or in an introductory email following offline contact—of how frequently (e.g., daily, monthly, or weekly) they can expect to receive email communications. Newsletter communications should typically reach recipients at a consistent time on a regular basis, usually monthly. Sending newsletters too frequently, or too infrequently, or on varying schedules, may clash with expectations and reduce the likelihood that recipients will open them. Also, if a campaign has created multiple types of newsletters, it should allow supporters to choose the types of emails they want to receive. The primary steps in generating newsletters to build support are outlined in Figure 4.

- **Be discreet with group email.** When using email clients such as Microsoft Outlook or Eudora, or web-based email such as Gmail or Hotmail, make sure you always put recipients' email addresses in the "bcc" line instead of "to" or "cc." Otherwise the email addresses will be visible to everyone on the list, enabling others to use the list. If that happens, people may become annoyed and ask to be removed.

- **Do not put anything in an email that should be private.** Emails can be forwarded in an instant, and the final destination of an email could be anywhere. It could wind up in the hands of the opposition!

- **Tie email with web content.** Not all of the most compelling content to be shared with supporters has to be included in the body of an email message. In fact, email strategies are most effective when they make use of content posted at an organization's website, particularly rich media content such as online videos, Flash animation, or audio content.[36]

Tools to Connect to Audiences and Enable Supporter Action

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

TABLE 2. Technology Tools

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

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

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

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

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

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

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

CASE STUDY

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

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

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

1. **The possibility of an opposition campaign:** Even though there was broad support for Proposition 63 among interested stakeholders in the state, mental health care was not a particularly salient issue for voters. The campaign, therefore, needed to increase its visibility to grow a base of support. However, it was also concerned about provoking possible opposition, particularly the anti-tax lobby, into mobilizing its own campaign. The campaign consequently opted to pursue an "under-the-radar" strategy, preferring an approach that would not attract major attention to its website.

2. **Its target audience was not tech-savvy:** Because the members of the large organizations in the Yes on 63 coalition were comprised of demographic groups who tended to use the Internet less frequently than the general population, the campaign knew a strategy that relied heavily on recruiting support through the Internet would not be very successful.

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

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

The initial thrust of the campaign's online fundraising strategy was to grow its existing email list of 3,000 supporters. Before appealing for donations, organizers cultivated a relationship with these supporters to encourage them to draw in others to join them. The campaign provided daily updates on its main website and sent weekly emails to supporters about campaign-related developments.

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

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

Nearly six months into the 11-month campaign, organizers began to utilize traditional campaign strategies to bolster the effectiveness of online fundraising. They hired five field staff, spread across the state, to meet with organizations and get them to commit to forming online teams.

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

Tools That Stand Alone vs. Tools That Are Integrated

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

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

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

FIGURE 5.

Standalone Technology Tools: The *a la Carte* Option

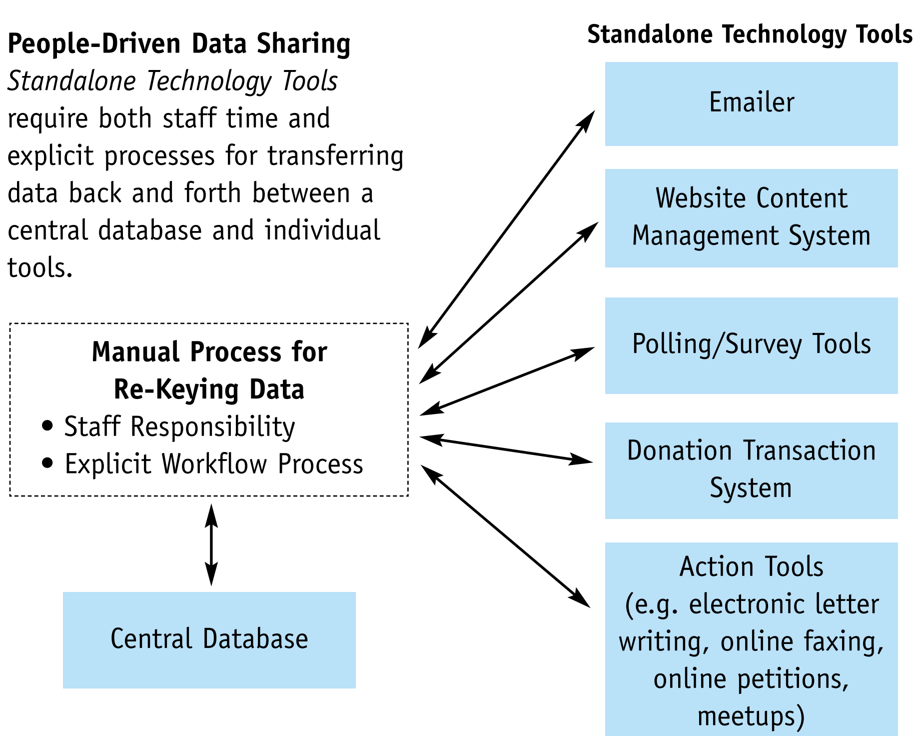


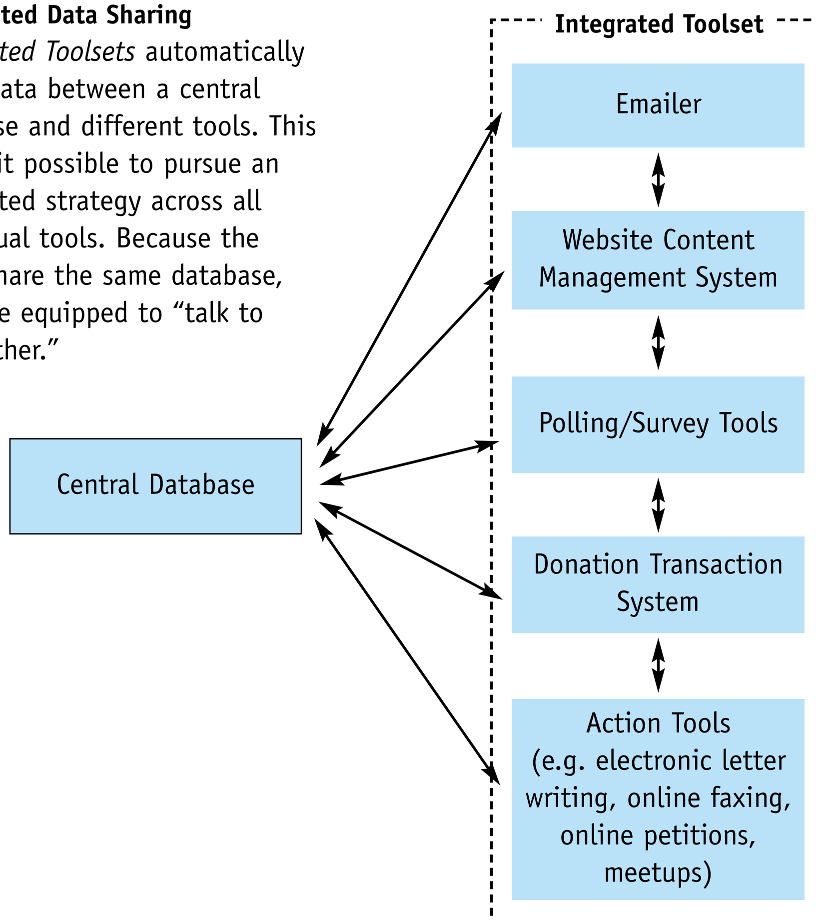
TABLE 3. Standalone Technology Tools and Their Providers

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

FIGURE 6.

Integrated Toolsets: Tools That Work Together

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



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

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

TABLE 4. Integrated Technology Tool Providers

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

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

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

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

Measuring Effectiveness: Tracking Online Campaigns

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

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

Tracking Website Effectiveness

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

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

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

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

Equally important to monitoring these metrics, is monitoring them over time. This allows a campaign to identify website activity around specific external events such as news coverage or rallies, as well as general trends in website usage, including specific details about page views, site visitors, responses to calls to action, and overall visitor or supporter behavior.

Tracking Email Effectiveness

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

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

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

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

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

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

  There are two types of bounces to be aware of:

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

  - **Hard bounces:** Permanently undeliverable emails because of faulty addresses.

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

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

- **New subscriber rate:** Tracks the number of people wishing to be added to the campaign email list. Tracking the rate of new subscribers can help gauge the effectiveness of specific outreach tactics. Comparing the unsubscribe and new subscriber rates can help a campaign determine its "net subscriber"[44] rate, which helps to evaluate the condition of an email list.

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

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

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

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

CASE STUDY

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

The No on Proposition 54 Campaign

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

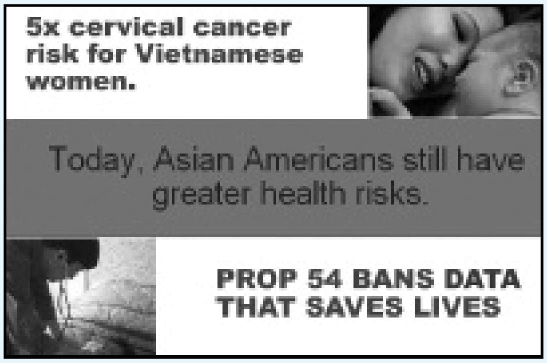
The American Civil Liberties Union (ACLU) of Northern California, one of the anchor organizations in the "No on Proposition 54" campaign, partnered with a technology toolset provider[46] to develop and implement an Internet strategy that would get out the No on Proposition 54 message and to help raise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

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

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

continued

continued



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

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

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

Technology Tools and Strategic Service Providers

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

Technology Tool Providers

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

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

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

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

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

TABLE 5.

TECHNOLOGY VENDORS, DEVELOPERS, AND COMMUNITIES

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

TABLE 6.

Technology Vendors and Strategic Service Providers

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

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

Technology and Strategic Consulting Providers

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

Strategic Consulting Providers

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

TABLE 7.

Strategic Consulting Providers

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

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

Intermediaries and Research Institutes

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

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

TABLE 8. Intermediaries and Research Institutes

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