Conservation Database Report

A White Paper Prepared for the Rockefeller Family Fund by

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Preface

This useful report by Marshall Mayer was supported by the Rockefeller Family Fund. In it, he describes a series of promising efforts to use database technologies to enhance the environmental community's effectiveness, and suggests ways to expand and improve upon them. Special attention is paid to the work of the Washington Environmental Alliance for Voter Education (WEAVE) which pioneered the technique of matching conservation group membership lists with state voting records and using the resulting "enhanced" data to mobilize environmentalists on election day. WEAVE continues to do fine work today, and its director, Ed Zuckerman, has become a resource for the entire conservation community.

Unfortunately, for every success, such as WEAVE's or the Colorado Action Network's, which Mayer also recounts, there are many more stories to be told about missed opportunities. In fewer than a dozen states have environmental coalitions taken the first step of pooling their membership lists and matching them with their state's master voter files. Of those projects, only a couple have gone beyond the basics to enhance the lists with demographic and other information, and to use the new data in targeting more sophisticated outreach. The rest ignore the information that they have in hand.

The challenge for funders is to figure out how to make groups aware of what they have and to inspire them to help themselves. The hardy band of technology circuit riders who have spread word to the grass roots of the power of email, the use of database technology, the information riches of the Internet, and the convergence of telephones and computers agree that the greatest challenge remains getting people to use what they have. It is a bottom-up process that can be time consuming, frustrating, and costly. Yet, it needs to be done. Such investments of time and money may, in time, yield remarkable returns -- both fiscal and political.

Just before I sat down to read Mayer's report, I picked up a national business magazine and read for perhaps the tenth time the story of how Wal-Mart uses information technology to secure competitive advantage. The article quoted a senior executive to the effect that he didn't yet know how to use all of the information the company was collecting, but he'd figure out what to do with it in the future. Although they don't realize it, many environmental groups are in a

similar position. Their members have given them valuable information about themselves that could be used to advance their organization's goals, and deepen their members' commitments to improve the environment. But, they don't know how to use the data they are already collecting.

Marshall Mayer's report is one attempt to remedy this deficiency and to introduce several concrete projects that environmental groups can undertake immediately and for minimal expense. It is a worthwhile exercise, as is the work of his circuit-riding colleagues across the country. Our collective challenge is how to expand and speed up the diffusion and utilization of these empowering techniques and technologies.

Donald K. Ross
Rockefeller Family Fund

Executive Summary

At a time when it finds itself increasingly under attack, the U.S. environmental movement needs to find effective ways to rebuild its grass roots base and increase the political activity of conservationists. Conservation databases -- computer applications that allow environmental organizations to turn their lists of members and supporters into powerful communications, organizing, and fundraising resources -- offer a promising new set of tools for such efforts. Such technologies are rapidly becoming more accessible to nonprofit groups, and can allow them to leverage limited resources into far more successful outreach programs. A well-designed database may be the single most strategic information or communication technology available to conservation organizations.

The usefulness of conservation databases may be dramatically increased through list enhancement projects. Such projects combine the membership lists of several environmental organizations, and then enhance them with information from state voter files on the demographic characteristics and voting behavior of individual members. The resulting, enhanced membership lists are analyzed for carefully targeted use in collaborative conservation campaigns, which most often focus on increasing environmental voter turnout. All list enhancement projects also return to participating groups enhanced versions of their own lists, to help build their capacity to organize and communicate with their members.

The best list enhancement projects lead to a sophisticated understanding of who the conservation constituency is -- demographically and geographically -- and how often they actually vote. Such information makes it possible to target conservation campaigns at audiences that organizations know, in advance, will be receptive, making it possible to significantly increase turnout of environmental voters. The Washington Environmental Alliance for Voter Education's (WEAVE) 1995 list enhancement and outreach project led to a sharp increased in turnout -- almost 13 percent -- among the infrequent voters it targeted for a statewide referendum on a "takings" bill passed by the Washington legislature. The effort certainly had a substantial effect on the referendum, which, in a major victory for conservationists, was soundly defeated.

Conservation databases can also enable effective use of new communications tools, such as the Internet and automated fax

systems. The Colorado Action Network (CAN) -- a high-tech network of over 3,000 activists around the state -- consists of members recruited through the use of data from a 1996 League of Conservation Voters Education Fund (LCVEF) list enhancement project. Using Internet email, CAN members receive alerts that include pre-addressed sample letters to the targets of the action (who, most often, have been the members' state legislators). Citizens' responses can be emailed back to the CAN, which automatically converts the letters into faxes and delivers them to the appropriate fax machine in a matter of minutes. The system clearly affected votes on a number of important issues, and offers an innovative model for electronic activism in other states.

Conservation databases and related technologies offer enormous potential. They will only fulfill it, however, if such efforts simultaneously develop the capacity of local groups to manage and analyze data, the ability of environmental consortia to do list enhancement work, and the capability of environmental groups to organize via the Internet. Funders approaching conservation database work should support:

- a national, strategic approach that includes development of standards;
- a strong focus on outreach to new conservation constituencies;
- the development of model database applications for conservation groups;
- projects designed from the grass roots up, with substantial technological and management assistance for local groups;
- rigorous measurement of results, and development of tools and data for such evaluations;
- creation of a national service bureau for list enhancement work;
- a frank, ethical, thoughtful approach to privacy concerns;
- collaborative database work with other progressive constituencies;
- the use of the Internet as a communications and organizing medium; and
- interchange among those now pioneering conservation databases and list enhancement projects.

I.   Introduction

As it approaches the twenty-first century, the U.S. environmental movement finds itself facing a paradox. The vast majority of Americans describe themselves as environmentalists, and a large share of them even declare themselves willing to sacrifice income or living standards to reduce pollution and conserve natural resources. Yet, at the same time, American voters continue to elect many politicians who view the environmental movement with indifference or outright hostility. The two most recent national elections brought in the most ardently anti-environmental congresses in memory. Public support for natural resource conservation and environmental protection remains "a mile wide but an inch deep," and the conservation movement -- with all its sophistication in media relations and direct marketing -- is, all too often, failing to turn broad support for its goals into political action.

Luckily, a new set of tools that may improve this situation is now becoming available. Many groups are creatively using information and communications technology to translate environmental sentiment into political power. Since the 1994 election, there has been a renewed effort by several state, regional and national conservation organizations to identify and mobilize citizens who will support green candidates and initiatives. Many of these campaigns have also sought to increase the strength of local conservation groups by building their capacity to recruit and engage members, donors and activists.

All of these efforts utilize [database](#)[1] technologies: computer applications that allow organizations to turn their lists of members and supporters into powerful communications, organizing, and fundraising resources. Such technologies are rapidly becoming more accessible to organizations with limited technological and financial resources. With proper equipment, training, and support, information technologies can allow groups to leverage limited resources into much more successful outreach programs. Indeed, a database may be the single most strategic information or communication technology that a conservation group can develop.

This report seeks to educate donors about the emerging field of conservation databases, highlighting some success stories that provide lessons for future projects. This report also identifies needs

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[1] Words that are underlined in the *Conservation Database Report* are referenced in Appendix A, the Conservation Database Glossary.

for strategic investments that could increase the effectiveness and national significance of conservation database projects. This report is not intended to help donors decide *who* should receive support for conservation database projects. Rather, I hope it will serve to educate donors about an important, emerging field, and motivate them to support the diverse, creative and coordinated efforts of many organizations.

I would like to acknowledge the financial support of the Rockefeller Family Fund, as well as the intellectual engagement of Rob Stuart of the Rockefeller Technology Project, in developing the ideas in this report. Of course, the pioneers in the field of conservation databases deserve much of the credit, for without their creative application of information technology this report would not be possible. However, responsibility for final content of this report remains with me. Finally, I encourage further dialogue among colleagues to grow this emerging field.

II. List Enhancements

A list enhancement project seeks to combine the membership lists of several organizations, enhance the membership lists with new data (such as demographic data and voting history) from a voter file vendor, analyze them, and then use the enhanced information in a collaborative conservation campaign. List enhancement projects also return the enhanced data back to the participating groups to build capacity to organize and communicate with their members. The result, in the best of the list enhancement projects, is a sophisticated understanding of who the conservation constituency is -- demographically and geographically -- and how often they actually vote. Such information makes it possible to target conservation campaigns at audiences that organizations know will be receptive, making it possible to significantly increase turnout of environmental voters. Such data were rarely, if ever, available to conservation groups until the advent of the projects described in this report.

Cooperation among many conservation organizations is a crucial facet of successful list enhancement projects. The databases addressed in this report are not the property of a single organization. Rather, they are always the result of a collaboration between many, where groups agree to combine, "enhance" and use their data -- membership lists, activist networks, petition signers, and so on -- together.[2] Just a few years ago, many thought it impossible that conservation organizations would agree to pool their names into a common database. Mailing lists are the lifeblood of membership organizations, commonly viewed as assets to be protected at any cost. But some conservationists realized that they were having only marginal influence on the political process, and that gaining much greater power would require pooling the resources of like-minded organizations. They found list enhancement to be one of the most productive areas for cooperation.

List enhancement projects are a relatively new strategy for conservationists. The Washington Environmental Alliance for Voter Education (WEAVE) conducted its first list enhancement project in

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[2] The significant benefits of a list enhancement process, as outlined in this section, can be realized by autonomous organizations. However an organization is also more exposed to the potential pitfalls of list enhancement projects. Finally, list enhancement projects that are collaboratively implemented realize economies of scale that are much more difficult for organizations to achieve on their own.

1995. It was closely followed by a regional list enhancement project conducted by the Northern Rockies Campaign and Desktop Assistance for Idaho, Montana and Wyoming groups. Since 1995, state-based, conservation-oriented list enhancement processes have been conducted in Washington, Oregon, Idaho, Montana, Wyoming, Colorado, Michigan, New York, Maine, California and North Carolina. The Sierra Club sponsored a national list enhancement project in 1996, targeting 10,000 conservation voters in each of 18 Congressional District races and 7 U.S. Senate races.

Currently, state-based list enhancement projects are being organized in Minnesota and Alaska, and a regional project is being organized in the Southwest (Nevada, Arizona, New Mexico, Utah and Colorado). Because many of these projects have been or are being conducted under the partial or complete sponsorship of the League of Conservation Voter Education Fund (LCVEF), and the methodologies have been developed in coordination with each other, there is a great deal of consistency in the approach taken by all the projects. A list enhancement project typically has several steps, which can take as little as three months or as long as a year:

- A formal agreement is reached between groups with shared conservation goals to prescribe how each group's names can and cannot be used in the collaborative project. Clear and compelling outcomes bind the coalition together, but it is each group's confidence in the security of its list that determines if and how the groups participate. A [database agreement](#)[3] is designed to secure the appropriate use of a group's names, and is the single most important factor in a project's success.

  Although all agreements are unique, key elements of the typical database security agreement include:

  - names in the common database are only for the use of the project and its participating groups;
  - any enhancements made to the database are the property of all the participating groups;
  - access to the common database will be only by the project;
  - any use of the common database will safeguard the anonymity of the source of each record; and
  - no fundraising, membership recruitment or illegal electoral activities will be conducted from the common database by the sponsoring organization of the list enhancement project.

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[3] A sample database security agreement is included as Appendix B.

- The membership lists of the participating groups are [merged] into one large list, names and addresses are converted to a standard format, and duplicate records are removed or [purged]. Duplicate records are those members that belong to more than one group. Typically, there is only a 15 to 20% membership overlap in a list project.

- The cleaned list is sent to a voter file vendor. These vendors collect voter information from local election officials (usually at the county level), including registration date and voting history. They also add demographic data from the U.S. Census files and other public sources. The vendor matches the conservation list against the list of all registered voters, and, if there is a match, returns the election data along with other demographic and geographic information, such as sex, age and the legislative districts in which the registered voter resides.

- The list enhancement project conducts an analysis of the returned data. The analyses depend on the goals of the project, but generally examine the match rate (usually 50 to 60%[4]), the [voting propensity] (whether or not they are registered to vote and how often they vote) of the conservation constituency (which, according to all list enhancement projects to date, is nearly the same as the general population), voting behavior by sex and age, number of members that belong to more than one group, membership numbers by political districts, etc. These analyses are generally used to help refine outreach strategies.

- The uses of the data depend on the collaborative goals of the participating groups. Most list enhancement projects use the data to increase participation of conservationists in the political process, in ways that are permissible for 501(c)(3) and 501(c)(4) organizations. Other list enhancement projects try to influence state-based legislative processes. Still others focus on identifying and mobilizing regional constituencies to participate in administrative procedures, such as public comment on environmental impact statements or proposed regulations. Each

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[4] Match rates -- the rate at which a record in a conservation database is found and matched by a record in a voter file vendor database -- are affected by several factors. For the most part a match may not be made because the contact information we have about a conservation member is not the same as what is in the voter file. For example, Bob Smith may be a member, but he registered to vote as Robert Smith. Or we may know his P. O. Box number, but he is registered to vote at a street address. These data inconsistencies account for most of the misses. However, other names may not match because some conservation members are not registered to vote.

use requires a detailed analysis of the data and how they can be used to further the conservation objectives of the participating groups. Many of the projects are demonstrating impressive results (see the next section).

- A final step of all list enhancement projects is to return to each participating group an enhanced version of the list they submitted. The groups then use the enhanced data for targeted fundraising and organizing. At a minimum, the list is returned as a standard-format file with enhanced data appended to the original contact information (along with documentation about the enhancement process). More ambitious projects actually overhaul or convert the database of the participating group (complete with extensive technical support), making possible ongoing, in-house analyses of relationships between the enhanced data and existing fundraising and activist lists.

While all list enhancement projects face difficulties unique to their situation, several types of problems are common. Among them:

- Timeliness, expense, and data quality are the biggest and most frequently reported problems. All list enhancement projects are dependent on data that are available only from voter file vendors. Currently, most states have at least one vendor, but some have none. Many states have only one. These vendors' usual customers are political campaigns that deal with much larger volumes of data than the typical conservation list enhancement project. List enhancement projects thus often get assigned lower priority by vendors, pay higher prices than larger-volume customers, and suffer longer turn-around times. Many list enhancement projects also complain that the data they receive are not as accurate as it could be. While data-quality problems are often eventually fixed, sometimes the resolution comes too late to be of much use in a time-limited campaign.

- Database management and technological capacities in local conservation groups can be quite limited. Substantial training and support may be needed before some groups can make effective use of enhanced data. Most organizations maintain mailing lists for regular communications with members and supporters, but few have databases that enable them to analyze the effectiveness of their outreach and membership campaigns. Most groups involved in list enhancement projects have difficulty relating their legacy data (information about membership and activism) to the enhanced data (information about demographics and voting history) so that they can analyze trends and gaps.

- List enhancement projects -- and the direct mail and telemarketing often done in conjunction with them -- can be expensive, and can come into competition with groups' other priorities. Especially when in "campaign mode," there are no more precious resources for organizations than time and money. Such conflicts can limit the number of outreach contacts projects can make. Clear planning and budgeting -- with long lead times -- are essential for successful collaborative outreach campaigns.

In spite of all the problems that can plague list enhancement projects, pioneers in the field have realized major benefits:

- List enhancement projects bring about greater cooperation between groups. This is the single most important benefit, one cited by all projects and their participants to date. List enhancement projects are not just about building databases: they are about building relationships and trust between groups that too often have not worked well enough together in the past. The most successful projects spend a lot of time, early in the process, facilitating agreements between groups about how proprietary information will be protected. At the end of the process, increased cooperation tends to produce more consistent statements from participant groups, making it easier for a cohesive conservation message to get across to the public.

- Conservation groups gain a much greater understanding of their individual members through list enhancement projects. When a group keeps a simple mailing list, all they may know about their membership is how to send them mail and perhaps when a member last contributed. List enhancement projects add value to membership databases, increasing knowledge about individual members that enables "one-on-one" relationship building with larger constituencies -- with the appropriate use of demographic, geographic and voting behavior data.

- Conservation groups also understand more about their membership in the aggregate. Groups can measure the appeal of their organization to certain demographic groups. For example, many conservation groups currently appeal primarily to older white males. If this constituency is not all that is needed to win on conservation issues -- college educated, middle-income women and young people are key "swing" constituencies on many issues -- groups can change their outreach tactics to appeal to more appropriate demographic groups.

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- List enhancement projects help to limit the universe of potential targets, thus maximizing the impact of limited outreach resources. No organization has the advertising or direct marketing budget to indiscriminately attract new supporters. Rather, they all need to skillfully target their efforts to people that are most likely to respond positively. List enhancement projects enable a group to "slice and dice" the universe into ever more manageable and discrete parts.

- List enhancement projects have the potential to lead to increased political sophistication, confidence, effectiveness and clout on the part of conservation organizations. Conservationists get noticed when they can turn out a block of votes on election day, when they can mobilize a large number of citizens to weigh in on a legislative proposal, when they can influence public policy by organizing an active constituency -- all of which are more likely when groups work together with enhanced data. In many ways, the most sophisticated list enhancement projects are taking a role -- voter registration, "permissible" political education, and get-out-the-vote activities -- that political parties once played, before the current reign of PACs and consultants.

The potential of databases and list enhancement projects to influence public policy and build the conservation movement can be illustrated best by success stories from the field. This brief compendium is not intended to be inclusive of all the many worthy efforts around the country. Rather, it is intended to be illustrative of the key elements that have made these efforts successful.

III. Success Stories

Perhaps the most valuable information that list enhancement projects can glean from matching their lists with voter files is data on how frequently their constituents vote. List members identified as registered voters are assigned a voting propensity index, which indicates how many times that person has voted in the last 4 elections. Thus a "perfect" voter has an index of 4/4 (voted in all of the last four elections) while someone who is registered but has not voted is given an index of 0/4.[5]

List enhancement projects operate under the theory that conservationists are more likely to vote when an organization they support asks them to do so. In practice, their goal is to identify those constituents who are most likely to increase their environmental political activity when contacted. These are generally held to be registered voters who sometimes, but not always, participate in elections. Projects to date have used 2/4 voters -- those that have participated in at least two of the last four elections -- as their key "swing" constituency. The following cases indicate that such efforts can be an effective way to increase the turnout of environmental voters.

A.   Increasing Environmental Voter Turnout

In the spring of 1995, the Washington Environmental Alliance for Voter Education (WEAVE) initiated a project to enhance the mailing and membership lists of Washington state conservation groups. It did so, in part, in response to rumors that anti-environmental groups had begun to incorporate sophisticated database technology in their work. WEAVE set out to find out if these techniques could also be effectively used by conservationists.

The list enhancement project came at a critical time for the state's environmental movement. The combined efforts of the timber, construction, real estate, and agribusiness industries and other moneyed interests had resulted in the passage of a "takings[6]" bill in

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[5] Data from voter file vendors is not infallible. Voting records do not move from county to county if a voter relocates. Also, country registrars and voting officials, particularly in smaller rural counties, may not institute adequate data quality standards. However, these are factors that are beyond the control of list enhancement projects.

[6] Takings is shorthand for compensation of property owners when government regulates private property for public purposes. The legislation sought to require

the Washington legislature. In response, a broad coalition successfully mounted a signature drive to stop the legislation by placing the issue on the November, 1995 ballot. This "No on 48" campaign had strong support within the conservation community. While some members of the environmental community joined the campaign steering committee, others encouraged their organizations to mount separate projects within the scope of the IRS's rules for nonprofit organizations.

The WEAVE project was to become an important part of the environmental community's response to Referendum 48. WEAVE merged the membership lists of 19 organizations, removed duplicate names, and enhanced this "mega-list" by matching it to information in the voter file. The list enhancement was conducted to incorporate such information as voting frequency, legislative district, and other demographics. The result was a merged list of more than 233,700 registered voters[7] who were members of one or more environmental organizations. The enhanced lists were then returned to the organizations, with the registered voters identified and their voting propensity listed.

Conservation organizations used this information to target a get-out-the-vote campaign -- a legally permissible effort for nonprofits -- for Referendum 48. The campaign focused on increasing turnout of infrequent voters in the environmental constituency. Those environmental members who had voted in only 2 of the last 4 elections were contacted and urged to defeat Referendum 48. The campaign was a success: between the efforts of the coalition-led "No on 48" campaign and the supporting activities of the environmental organizations, Referendum 48 was defeated 60% to 40%.

To estimate the effect of the use of its enhanced data on the outcome of Referendum 48, WEAVE examined voter participation data from the November 1995 election. They compared the turnout of two sample voting groups from King County (Seattle): regular 2/4 voters and 2/4 voters contacted by WEAVE. They found that WEAVE's field effort increased voter turnout by almost 13% over that of the average King County 2/4 voter. This increase was remarkable compared to other attempts to boost voter turnout: standard campaign wisdom holds that field work can be expected

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compensation in a variety of circumstances, threatening basic environmental safeguards.

[7] This block of conservation voters represented approximately 8% of the total number of registered voters in Washington at election time, a significant number.

to move no more than 2% of any voting population during a campaign.

The success of WEAVE's work on Referendum 48 was eye-opening for long-time campaigners. The true potential for activating the environmental grass roots became apparent. The tremendous possibilities for using enhanced data were not lost on groups who did not participate in the first year of the WEAVE project. A total of 32 groups -- 13 more than in 1995 -- participated in the 1996 list enhancement project.

B.   Influencing Public Policy

Across the country, state legislatures, governors, and natural resource agencies are playing an increasingly important role in setting environmental policy. This is certainly true in Colorado, as well as most states in the West.

As assaults from Wise Use groups and extractive industries have grown louder, the Colorado environmental community has found itself at a competitive disadvantage when attempting to influence public processes. In an effort to counter increasing attacks on environmental protection, the League of Conservation Voters Education Fund, the Environmental Defense Fund (EDF) and other members of the broader environmental community have developed the Colorado Action Network (CAN).

The CAN is a high-tech network of over 3,000 activists around the state who belong to various conservation and recreation groups, including EDF, the League of Conservation Voters, the Colorado Environmental Coalition, and the Colorado Public Interest Research Group. Activists were recruited through the use of the enhanced voter data provided to each group by a LCVEF list enhancement project conducted in 1996. LCVEF's project in Colorado combined the membership lists of 15 groups to enhance the data of 75,000 registered conservation voters.

Members who passed through a "high activism propensity" screen -- including voting in all of the last four elections -- were solicited by telemarketing to join the network. The screen proved incredibly useful and cost effective, identifying a target group of potential members who joined CAN at a surprising rate of over 65%.

CAN uses new communication technologies, based on the national EDF Action Network, to deliver action alerts to its members. New members provide their name, street address and email address, and

the CAN database automatically assigns state legislative districts and congressional district based on their address information. Action alerts are then sent to activists via email. The alerts include background facts on an issue and a sample letter pre-addressed to the target. Members are encouraged to edit the letter and then send it back via email to the CAN, which automatically converts the email letter to a fax, addressing it to the appropriate target and sending it to the destination fax machine in a matter of minutes. The system also automatically records the member's response to the appeal in the CAN database.

Although 1997 was just its first year of operation, the CAN's success was impressive. No bill was actually defeated on the floor of the legislature, but the response from the grass roots community prompted many legislators to vote with the environment on a number of important issues. The first full alert effort resulted in constituency contacts that overwhelmed fax and phone machines.

Colorado offered particularly suitable conditions for establishing such an activist network: the Denver-Boulder area has the highest email usage rate in the country, and the LCVEF list project provided an important resource for targeted recruitment efforts. Thus, CAN's communications are immediate, and its operation inexpensive. In addition, Colorado's "citizen" legislature -- in which all members serve part-time, with no professional staffs -- is particularly sensitive to such activism, since all faxes and phone calls are received directly by the legislators themselves. "Citizen" legislatures operate in much the same manner in many other states, and many local elected officials are accessible via similar contact methods.

The CAN has been more than just a new opportunity for the state's conservation groups to influence public policy. It has also brought the environmental community together in an unprecedented way. All of the participating groups approved each alert, and network strategy was based on coalition actions, not individual agendas. The CAN's success in cooperative use of inexpensive, accessible technology portends well for groups in other states that face long odds as they try stem the downward spiral of citizen influence on environmental public policy.

IV. The Significance of Conservation Databases

These impressive success stories all are less than two years old. But conservation groups have been using databases for years. What has changed, and why is this change significant now?

In the late nineties, the U.S. environmental movement is at a turning point. With fewer friends of the environment in Congress -- and hardly any chairing key committees -- the substantial corps of expert lobbyists employed by the environmental movement now find themselves mostly on the defensive. Even some of the movement's "friends" in government have come to fear -- and, at times, accommodate -- what they perceive as a substantial anti-environmental movement in grass roots America. The result has been lawmaking that increasingly fails to protect the environment. Furthermore, with a more conservative federal judiciary interpreting the laws, the courts -- the traditional last resort of environmentalists -- are also becoming a less useful avenue for reform.

The national environmental movement's traditional emphases -- lobbying and litigation -- thus now are aimed at far less receptive targets. What's more, the national groups' long-term dependence on Washington-based lawyers and experts has been to the detriment of their grass roots base, which all too often has been allowed to atrophy. Some groups and campaigns have continued to make effective use of activist members, and media campaigns have helped shape public opinion, but, by and large, the environmental movement derives much of its remaining power on its expertise and the righteousness of its beliefs.

At the same time, anti-environmental groups have done the kind of grass roots work that the conservation movement has neglected. It is now widely acknowledged that the environmental movement has been out-organized by its opponents -- using methods that democratic and progressive organizations pioneered and perfected. Industry-sponsored front groups have conducted well-financed "Astroturf campaigns,"[8] using traditional organizing methods and

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[8] "Astroturf" campaigns are fake "green" grassroots campaigns, organized by corporations to mobilize public opinion for or against political and public policy initiatives. They almost never represent constituencies that are organized into democratically-controlled groups.

supplementing them with state-of-the-art communications tools. [9] These campaigns have been successful at changing public opinion and influencing public policy. Such a campaign, for example, led to the Washington "takings" legislation eventually stopped by Referendum 48.

Many conservation organizations have responded to these developments by turning back to grass roots organizing. In the hopes of mobilizing a large power base to offset the inroads of the anti-environmental movement, many state, regional and even some national groups are doing traditional base-building work. By and large, these efforts are not intended to replace legal or lobbying strategies, but to augment them by putting some "bark behind their bite." Such organizations are also beginning to look more to cooperative work with local groups, who -- since they *are* the grass roots -- never forgot the power of traditional organizing.

List enhancement projects are an important new tool that can help the conservation movement rebuild its base, and draw individual activists, local groups, and national organizations closer together around a common agenda. At their best, they recognize that relationship building -- constituency organizing -- is the basis for future development and expansion of the environmental community.

List enhancement projects supplement traditional community organizing by leveraging groups' capacity to develop one-to-one relationships with ever-larger constituencies. They do so by making possible careful targeting of messages, a marketing strategy shared by the most adept organizations in business, government, and the nonprofit sector. As mass communications overdose the public with messages, *attention has become a scarce resource.* An effective communications process delivers the right information to the right people at the right time in an easy-to-use fashion. The basic strategy is the same, whether the message is to buy a product, RSVP to a wedding invitation, or call a Senator to help pass environmental legislation.

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[9] It is not uncommon to hear that conservationists should be using new technologies because anti-environmental forces are. This attitude fundamentally misses the point. The reason that conservationists should embrace new communications technologies is because *all* organizations need to do so if they want to thrive and grow. The sea changes in the communications paradigm affect all sectors of our society, and those organizations that do not adapt -- just like any species -- will not survive. Anti-environmental forces, being on the defensive, successfully adapted first.

List enhancement projects are a necessary tool for a revitalized environmental movement, but are not themselves sufficient to meet the challenges at hand. The WEAVE and CAN success stories discussed earlier also reveal additional, related tools for development of conservation action in the Information Age. A comprehensive strategy can be summarized as the three legs of a stool:

- **Local Data Management Capacity**

    The first leg of the stool is the capacity of local conservation organizations to manage information about their members, donors, activists and prospects. Local conservation groups will remain the strength of the environmental movement. List enhancement projects can only add value to the membership lists of cooperating conservation groups in proportion to the size and quality of the original lists. Local conservation groups are also in the best position to consistently use the results of list enhancement projects to build constituencies for change. Thus it is incumbent upon all -- list enhancement projects and donors alike -- to support efforts to increase the capacity of local groups to manage, augment and expand their membership, donor and activist constituencies. Such efforts should include both management training and technological assistance.

- **List Enhancement Projects**

    The second leg is the combined capability of the conservation movement to add value to its local data through list enhancement, and to use the results in coordinated campaigns. List enhancement projects help the conservation community understand, at a much deeper level, who their constituents are, and how those constituents' attitudes and demographics compare to those of the public at large. This can help mobilize hitherto unidentified constituencies for conservation action. Long-term information on the activism of individual conservationists -- and how it changes in response to groups' work -- can help measure and improve the effectiveness of conservation organizations.

- **Electronic Organizing**

    The third leg of the stool is the conservation movement's ability to attract and contact large numbers of constituents quickly and cheaply through the Internet. The number of potential conservation constituents connected to the Internet is large and growing explosively. Though the technology is new to most

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people, 20 percent of American adults now use Internet email daily. With 45 percent of its users now female, the on-line world is no longer primarily the domain of male computer experts. In fact, the Internet constituency contains a disproportionate number of successful female baby-boomers and other demographic groups that typically support environmental causes. The Internet is the major new public sphere for unmediated civic action, and communications on it are instantaneous, inexpensive, and interactive. Though it cannot reach everyone -- yet -- conservationists must target it in organizing efforts.

Without any the three legs of the stool, organizing efforts are likely to fall down:

- Without local data management capacity, list enhancement projects cannot be sustained. Each list enhancement project is fundamentally dependent on the contribution of high-quality data by local groups. Collaboration is relatively easy to accomplish the first time, but local groups need to see a significant return on their investment to justify continued involvement. The most successful list enhancement projects understand this, and integrate local capacity-building with data enhancement work. The results are quantitatively and qualitatively measured in each participating organization, and reinforce each other over time, as better and better local lists are combined into successively more powerful list enhancement projects. And, at the other end of the process, large, collaborative campaigns depend on the "introduction" that local groups give them to activists on the combined list. Familiarity is an essential ingredient, for instance, to conducting successful appeals over the Internet -- often an anonymous, impersonal medium -- and email recipients are much more likely to respond to an appeal from, or associated with, a local organization they support.

- Without enhanced data, the universe of conservation supporters would still be "a mile wide but an inch deep." Conservationists simply won't fully understand who their supporters -- current and potential -- are, and will thus find it hard to reach out to them reliably and cost-effectively. Without the additional data available from voter files, even if individual conservation organizations or coalitions had the capacity to contact each of their constituents via email directly from their databases (few currently do), they would only be broadcasting indiscriminately to very large groups of people. Electronic communications may be virtually free to the publisher, but it is also very easy for the

recipient to throw out junk mail with no guilt over wasted trees. Enhanced databases make possible more effective targeting, or "narrowcasting."

- Without Internet capacity, conservationists can't afford to communicate with the constituencies they need to reach. This is true both for growing, local organizations and for the statewide, regional or national campaigns in which they collaborate. Large-scale direct media is largely beyond the budget of most campaigns, local or larger; free media that conveys the messages conservationists want to get across is harder and harder to get. The solution is to use the Internet to reach a conservation constituency directly. New, integrated tools for Internet organizing that are now being developed could enable environmental groups to build one-on-one relationships with very large numbers of activist citizens.

List enhancement projects have played a valuable role in illustrating the practical value of more accurately characterizing regional conservation constituencies. In their very short history, they have shown major potential for increasing environmental activism, and particularly for boosting conservation voter turnout. To the extent that such results can be scaled up to regional and national levels, it is clear that list enhancement projects, in and of themselves, are a valuable strategy for the conservation movement.

But efforts to identify and mobilize constituencies for conservation change cannot stop with list enhancement projects aimed solely at influencing elections. Conservation database projects, *more broadly defined*, must also build the data-handling capacity of local organizations, and improve the environmental movement's ability to recruit and engage constituencies using the Internet. Taken together, such efforts can help conservation groups organize successfully in the Information Age.

V. Future Challenges

List enhancement projects clearly offer a compelling strategy for building the conservation movement's base. Here are ten directions that the conservation database movement should take in the near term to build a foundation for constituency building far into the future:

A.   Think Strategically, Act Collaboratively

The increased conservation action created through list enhancement projects clearly makes them worthy of support. However, a strategic approach is necessary as the list enhancement movement expands. Decisions on new projects should not be made solely on estimates of where the conservation community can influence a swing constituency of voters in the next election. Instead, a coordinated, national strategy -- developed with the involvement of all the major national and regional organizations -- should attempt to identify the areas of the country that can make the most immediate and long-term use of list enhancement capacity building. National organizations should follow the lead of local organizations that have invested in these list enhancement projects.

There is also a need for national standards for database development and analysis, so that the results of different projects can be meaningfully compared. Developing such standards will require national leadership, and the involvement of both data producers and end-users.[10] Without standards, it will be extremely difficult for national organizations -- universally acknowledged as key partners in all list enhancement projects -- to combine data from different regions or states in national projects.

For example, list enhancement projects in some states determine 4/4 voters by looking at the last four state/local and federal elections, while others consider only federal elections as the basis for their analyses. Local elections are important, but voting behavior in them is often quite different from the federal elections which the national environmental organizations are most interested in analyzing. It is difficult to draw definitive conclusions when comparing apples and oranges. Each list enhancement project

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[10] See Appendix C for an example of "standards-setting" related to contact information in conservation databases. An additional advantage of standards is that local groups are asking for advice, and will adopt standards if appropriate leadership is provided.

should make national comparisons possible by using, as a baseline, the federal election results from the two most recent cycles. Any additional election results will add a richer dimension that will be most useful to local groups.

Other standards should be set as well, such as defining in each list enhancement project the status of the individuals involved. Many projects request only members from each participating group, while others have no status requirements, accepting records of individuals who are members, donors, activists or, sometimes, merely membership prospects.

B.   Use Projects to Grow the Constituency

List enhancement projects should focus more on innovative strategies to expand the ranks of conservation members, donors and activists. It's not enough to enhance the data of members: finding new members among a constituency that is a mile wide and an inch deep -- but unorganized -- is also important. It is surprising that there are almost no success stories -- or even attempts -- featuring the use of list enhancements to identify and recruit *new* conservation members or activists.

Initiative campaigns are excellent vehicles for base building when done in conjunction with a list enhancement project. Petition signers have acted on behalf of an issue; list enhancement projects should get these names to participating groups so they can recruit new members and activists. WEAVE has begun to experiment with this strategy. The voter identification telemarketing efforts of the LCVEF are also a step in the right direction, but more tests need to be conducted to determine if conservationists thus identified can be engaged as members or activists of participating organizations.

While these recruitment strategies still are largely untested, they should be given a high priority. If support for conservation is really much wider than is reflected in the ranks of existing groups, only such new efforts are likely to engage unorganized conservationists as members and activists. Otherwise, groups will continue to simply recycle each other's lists, since it is far easier to recruit someone that has already joined another conservation group than to try to find new members among the general public with the only the crude targeting hitherto available.[11]

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[11] List trading among conservation groups is an effective strategy, and many list enhancement projects make this process much easier. The temptation for many groups, however, is to stop with what easily works, thus neglecting

C.   Develop Useful Tools for Organizations

Support is needed for efforts to build basic tools that local, state and regional groups can use to manage information about their constituencies. The databases that most conservation groups are using effectively prevent them from taking the best advantage of the data gleaned from list enhancement projects. Most in-house databases are developed by well-meaning conservationists with little or no database development or data management training. Most groups are trying to adapt off-the-shelf software that is usually difficult to learn, use and customize. The market is not working well when it comes to providing useful tools to conservationists.

WEAVE, in a report summarizing their past two years of experience pioneering list enhancement methodologies (see For Further Reading, below), observes, "When WEAVE returns a membership list to a participating organization, the format may or may not be compatible for reintegration. This is undeniably the single biggest stumbling block for organizations." Groups can't add fields to incorporate new enhanced data, or import it to relate it to their legacy member, donor and activist data.

The WEAVE report points to a possible solution:

> "Probably the tool with the greatest promise comes from Desktop Assistance. Presently in the development phase, DA plans to unveil a low cost, user friendly database. This could be the single, most effective answer to the long term problem of reintegration of data. It would encourage expansion of database work by a greater percentage of staff and allow for more ease in lists exchanges between organizations."[12]

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opportunities to grow the overall conservation constituency by recruiting new members that are not currently affiliated with any other group.

[12] The database application, ebase™, will be released for use by other conservation groups in the first quarter of 1998. ebase is particularly well suited for adoption by groups involved in list enhancement projects because it puts all related data (contact, membership, donor, activist, civic, demographic, etc.) in one place for rapid analysis. Furthermore, ebase is designed as a modern communications tool, enabling organizations to send individually customized email messages to any size list directly from the database, as well as to automatically track response rates to any outreach campaign. Finally, it is designed as a *human* capacity building tool, educating conservation organizations about how to manage databases while allowing them to customize the application to fit their unique business practices. A conservation activist or membership coordinator need not be a dedicated database manager; rather, they can use ebase's very accessible interface to develop their own specialized scripts

D.   Design Projects from the Grassroots Up

List enhancement projects should be designed from the beginning to encourage membership and activist development among participating groups. Too often a list enhancement project is designed to meet the immediate needs of an electoral campaign. To make the investment worthwhile, for donors and participating groups alike, the list enhancement project should be designed to promote strategic skills development and constituency-building in local groups.

For example, when voter identification calls are made, an additional question might be asked to determine if the conservation voter is a member of or donor to any other citizen-based nonprofit. Since the act of joining or giving to a nonprofit is a far higher predictor of future organizational behavior than is their voting propensity, this information will be most valuable to participating organizations whose major goal in list enhancement projects is organizational development.

List enhancement projects and their funders also need to anticipate that participating groups will require technological and management assistance to make the most of enhanced data. Groups often do not have adequate hardware and software, and -- more important -- may need substantial staff training to build their human capacity to creatively approach, analyze and use data. Management support should start with basic education about the possible uses of enhanced data for conservation organizations, and should also include training in campaigns, organizing, and membership and donor development. Such support services should be made available to participating groups through list enhancement projects themselves, or through partnerships with local management support organizations or specialized consultants. Grassroots groups may also need financial assistance to help defray direct marketing costs associated with testing new approaches to constituency building.

Above all, funders and project managers should be careful to resist the temptation to use list enhancement projects to spur change in the behavior of grass roots conservation organizations. Grass roots leaders often perceive that "better ways of doing things" are imposed on them without regard for their real needs. As one key

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and layouts to manage communications with constituencies. For information, email ebase@lists.desktop.org, visit www.desktop.org/ebase, or contact the author to receive the ebase Business Plan.

practitioner of the list enhancement movement puts it, "what we are promoting tends to be framed, all too easily, as solutions looking for problems." National and regional leaders of the conservation movement have often failed to build the kind of collaborative relationships with local groups that allow the self-identified needs of the grass roots to help determine national and regional strategies. Such leaders are often technologically ahead of the grass roots. We should not be "pushing" technology to the grass roots level.

E. Rigorously Measure Results

Despite the progress that has been made by list enhancement projects to date, conservation organizations are not particularly adept at measuring the effect of their efforts to reach out to and mobilize constituencies. The development of new data management tools that include built-in feedback loops, to gauge the effect of communications campaigns, will help make it easier to evaluate programs. But without baseline data, which most groups do not collect, it is very difficult to measure results over time.

List enhancement projects are in a unique position to introduce measurement and evaluation methods that will provide participating groups with the tools to determine whether or not particular strategies worked. New evaluation methodologies should lead to definitions of "best practices" based on measurable results within the groups participating in list enhancement projects. This will be a major challenge, but at this early stage of development in the list enhancement movement, rapid development of methodologies that lead to measurable results should be supported above other approaches that are not demonstrably measurable. Over time, results should be rewarded, not only the development of promising approaches or technologies.

F. Establish a National Service Bureau

A national service bureau should be created to provide technical assistance to the emerging list enhancement movement. The movement has grown thus far thanks to the creative energies of several key database consultants, but all agree that a national bureau could more quickly and efficiently provide a variety of services needed by list enhancement projects. These might include enhancement of mailing addresses (adding Zip+4, carrier route, and delivery point codes), identification of duplicate records (merge-purge), phone number additions and updates, geocoding and spatial referencing (to determine geopolitical attributes such as

congressional, state or local legislative districts[13]), and basic name and address cleanup (to identify and fix anomalies). Several of these services can dramatically increase the voter file match rate of conservation membership lists, as well as dramatically reduce direct marketing costs, such as postage. A service bureau could also conduct basic analyses of lists, both in the aggregate and by organization, such as membership location by jurisdiction, membership by demographics and member/donor status by voting propensity.

Finally, a service bureau could serve as a broker to lower the cost and improve the value of data that are purchased from voter file vendors. In some cases, where there are no voter files or where confidence in the quality of a voter file available commercially from a voter file vendor is not high, it may even make economic sense for the service bureau to create the voter file themselves. If the state in question is not overly large, the long-term costs associated with repeatedly using a voter file certainly justify the short-term costs of building a file from scratch (visiting each county to assemble a state file, then enhancing it with demographic, census and other types of data).

G.   Address Privacy Issues Head On

We live in a conflicted culture: on the one hand, it is embracing the introduction of information technology with exuberance, while at the same time demanding more safeguards against the invasion of privacy that information technology can enable. Voter files, and hence list enhancement projects, are at the crossroads of this ambivalence. While voter files are public information, derived from data that are gathered and released by public agencies, there is a potential backlash from a conservation constituency that is in many ways latently (if not overtly) Luddite. It would be prudent for the list enhancement movement to address concerns over invasion of privacy -- before a backlash occurs -- through several concrete steps:

• Educate participating groups that they do not need to announce their enhanced knowledge of their constituency in their communications. Tailored communications to subsets of conservation databases that contain enhanced data simply need

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[13] The Grassroots Organizations Accessing Legislatures (GOAL) service, recently initated by the League of Conservation Voters Education Fund, is a step in the right direction. GOAL is a free service that provides state and federal legislative district information based on street addresses submitted by environmental organizations.

to reinforce a connection, not tell a recipient that, in effect, "we know lots and lots about you."

• Develop guidelines for each other and for participating groups about the ethical uses of data, especially when lists are sold to other organizations that do not necessarily share concerns over protecting our conservation members' privacy.

• Conduct more research, in conjunction with civil liberties and privacy protection nonprofits, about the implications of privacy concerns, and the efforts in Congress and state legislatures to limit the use of publicly available data.

H.   Conduct Progressive Outreach

Conservation and environmental protection, as important as it is, ranks far down the scale on the list of priorities evidenced when citizens vote. Even conservation voter identification efforts -- in which potential voters are asked about what motivates them -- have reached this conclusion. Furthermore, public opinion polling and voter identification telemarketing consistently identify two striking paradoxes:

• "Baby Boom" and slightly older women, aged 35-59, form the largest group of conservation supporters among the voting public. Yet the public profile and recruitment techniques of most conservation organizations are appealing to a preponderance of older white men. There is a disconnect: conservationists are not appealing to their most receptive audience.

• Very few conservation organizations appeal to young people, age 18-34, whether they are registered or not, despite the fact that this age group consistently expresses the belief that environmental protections are very important and that government does not go far enough to regulate polluters.

The effect of these trends is mutually reinforcing over time: the reason that our organized constituency is older and more male is that there has not been an infusion of new generational energy for almost twenty years, and women have been most unreceptive to the appeal that conservation groups have traditionally projected.

Unless these trends are reversed, the conservation movement will follow other progressive social change movements into virtual oblivion. Coalitions, however, have often been forged to help

strengthen the power of movements that would be powerless on their own. Coalition building is a difficult task, but the conservation movement is in a unique position to provide leadership. Conservationists, pioneering the use of databases for social change, can encourage coalition list enhancement efforts that could be mutually beneficial to many cross-constituency participants.

For example, the Voters for Choice Education Fund conducted extensive voter registration work in the 1996 cycle. Their approach was a bit different, and perhaps instructive for conservationists. They purchased the voter lists for targeted districts and reverse-matched them across commercially available phone lists to determine which demographically profiled women (those of child-bearing years who were more educated) were *not* registered to vote. Voter identification contacts were made, encouraging participation, which affected a number of electoral races.

The lesson for conservationists is that potential partners are organizing entirely different constituencies that are also demographically very receptive to conservation messages. The challenge for conservationists is to define why it is in the self-interest of the women's movement -- as well as other social change movements -- to join forces to expand the base of activists willing to act on behalf of mutual "progressive" beliefs.

Addressing this challenge will be especially important as conservationists -- in partnership with other constituencies -- address the public policy threats posed by impending term limits in state legislatures and redistricting at all levels after the 2000 census.[14] Absentee and "down-ballot" voter participation strategies, both of which offer promise for conservation constituencies, also can be pursued to the benefit of other progressive constituencies. Conservationists should reach out to other progressive constituencies to help build majoritarian movements for social change. Some established conservation list enhancement projects, such as the New York League of Conservation Voters, are exploring this new direction to involve other progressive constituencies. These efforts should be supported. Such collaborations could potentially realize even more

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[14] Increasingly, redistricting processes are publicly accessible, thanks to the automation and digital distribution of geo-referenced census, civic and demographic information. Geographic information systems (GIS)--database management systems that produce maps as their primary output--will be particularly useful in redistricting processes, especially when used by progressives in reform coalitions. While the technology is fairly advanced, it is within the reach of many citizen-based organizations.

significant economies of scale than efforts limited to the conservation community. Conservationists have already piqued the interest of other progressives: a recent national meeting of state-based progressive coalitions demonstrated significant interest in developing list enhancement projects. Our movement can provide key leadership.

I.   Adapt to the Internet

Perhaps the greatest challenge for the emerging conservation database movement is to extend list enhancement projects to operate in a new communications environment. All communications processes are fundamentally affected by the digital technology revolution most obviously manifested by the Internet. Today, any group with modest technology and a well developed database can work interactively with a large constituency based on the preferences and actions of individual conservationists.

Most conservation organizations have yet to realize this in any meaningful way. For all the resources that have been invested in efforts to get the "early adopting" conservation constituency on-line, organized conservationists are underrepresented on the Internet. Even the largest conservation listservs do not exceed 2,000 registered users, and even the most visible conservation World Wide Web sites do not experience more than 10,000 "hits" per week. In the rapidly expanding universe that is the Internet, these numbers are very small.[15]

Nonetheless, the future of communications lies in the Internet. List enhancement projects can help their participating groups prepare by advocating the collection of email addresses at every possible opportunity. For example, voter identification telemarketing efforts can solicit the email addresses of conservation supporters.[16] Over

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[15] By comparison, the listserv that Guy Kawasaki moderates to evangelize the benefits of Apple computers (a tiny minority in the market) has over 50,000 subscribers. The NASA web site which served as the front-line information resource for the recent Mars reconnaissance expedition received over 300 million hits in its first week.

[16] Recent efforts along these lines have met with less than successful results. In at least two list enhancement projects, email questions have been included in voter identification telemarketing scripts. However the question was posed as, "Do you have an email address?" without asking the follow-up to an affirmative answer, "What is it?" If 20% of the target population had an email address, as is the overall average in the U.S., 12,000 email addresses of conservationists were *not* gathered as a result of this oversight.

time, conservation list enhancement projects will realize the benefits of collecting email addresses in several ways:

• Within just a few years, most communications will be conducted over the Internet, and the medium will still be virtually free. The economics of electronic communications will be especially important if conservation groups are successful at growing their constituencies. Otherwise, they won't be able to afford to communicate with larger constituencies using traditional media such as direct mail and telemarketing.

• Of course, because the marginal cost of email communications is close to zero, citizens connected to the Internet will be inundated with email. The most effective communications will be based on the one-to-one relationships building that only organizations with good databases can facilitate. List enhancement projects can lead the way in helping groups collect the kind of data that make these types of communication possible. For example, email sent to particular geographic locations is possible in enhanced databases in ways that listservs will never be able to do: listservs *are* databases, but they do not track zip codes of registrants. It is even possible for conservationists to register for regular delivery of the kinds of information they want to receive from organizations, via a World Wide Web site.[17]

• Internet-based communications can also be interactive. Conservation groups don't need to limit themselves to broadcasting or "narrowcasting" content to their net-connected constituents. They can also interact with constituents based on communications that are directed to their organization. These interactions may be automated (by listservs or infobots) or they may be moderated by an "electronic organizer." Of course, an underlying database makes it possible to analyze the aggregate of interactive transactions so that successful campaigns can be repeated.

These are just a few of the implications of adapting to the impending sea change in communications brought on by the Internet. List enhancement projects, because they are in the vanguard of using technology to build conservation constituencies, can help our community adapt. If we don't, conservation groups

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[17] Such services are often called "push" technologies. At the time of this writing, there were no push services dedicated to conservation content. For an example of push technology, visit cnn.com and register for their Personal News Service.

will share the same fate as other non-adaptive businesses or biological organisms -- they won't survive.

The challenge will be to adapt in such a way that builds on the best methods of traditional community organizating, augmenting and amplifying their effectiveness with tools that scale to new and larger constituencies without much additional time or money.

J.   Grow the Conservation Database Field

Finally, support is needed for efforts to grow the emerging field of conservation databases. These should build on the excellent Estes Park, Colorado meeting sponsored by the League of Conservation Voters Education Fund in April, 1997, which convened most of the movement's early practitioners. The meeting provided important professional development and a healthy exchange of views and experiences among colleagues all genuinely committed to building useful conservation databases. Much of the content of this report was derived from the Estes Park meeting, and its participants all acknowledged its value. An annual (or more frequent) gathering, with an independently facilitated agenda and broader sponsorship, is needed to foster community among the often-isolated political and database "hacks" who are inventing new technologies and methods to build the conservation movement's base.

V. Conclusion

The development of conservation databases, as outlined in this report, represent one of the more promising strategies to engage large but latent constituencies of conservation supporters.

The potential of this new movement is at the convergence of two powerful trends: the anti-environmental political climate in Congress and most state legislatures; and the explosive growth of information technology. By every measure, the public strongly supports conservation, and the conservation database movement is simply developing new ways to identify and mobilize that support.

Foundations, as catalytic institutions, can play several critical roles in the development of the conservation database movement:

• Support the expansion of conservation database projects to identify and engage conservation supporters, especially women and youth, that could become *new* members of environmental groups. Organized conservationists are far too few in number.

• Support applied research to develop the tools and methods reinventing advocacy and organizing in an interactive and digital environment. All organizations -- private, governmental, and nonprofit -- are being forced to reinvent their relationship with constituencies in the Information Age. The nonprofit sector needs to devote more resources to the task of adapting its tried-and-true practices to communications defined by digital media.

• Support the development of *human* capacity in conservation organizations. Database technology is simply a means to an end, but without the appropriate strategic, political, media, organizing, and management skills widely distributed among the leadership and staff of conservation groups, the technology cannot be effectively used. Capacity-building organizations, as intermediary nonprofits, are an effective source of support for conservation organizations seeking to engage larger publics.

Above all, support a movement in its infancy. Its practioners are among the creative visionaries of the conservation movement, and need to be provided the support to experiment and evangelize.

For Further Reading

Readers interested in exploring the issues addressed in the *Conservation Database Report* are referred to three excellent reports:[18]

- *Help Wanted: WEAVE's Environmental List Enhancement Project*, published in 1997 by the Washington Environmental Alliance for Voter Education, P. O. Box 85194, Seattle, WA 98145, 206-527-7951, info@weave.org. This report outlines the process of establishing a list enhancement project in Washington state, and highlights its major outcomes.

- *Maximize Your Grassroots Power: Legal Guide to List Enhancement and Citizen Contact* published in 1996 by the League of Conservation Voters Education Fund, 1707 L Street NW - Suite 750, Washington, DC 2006-4201, 202-885-8683, info@lcv.org. This guide is extremely helpful for nonprofit groups that are concerned about the limits of "permissible" activities.

- *Computer Networking for the Northwest Environmental Movement* by Marshall Mayer and Liz Gans of Desktop Assistance, published in 1995 by the Brainerd Foundation, 1610 Second Avenue Suite 610, Seattle, WA 98121, 206-448-0676, info@brainerd.org. This report contains the seed ideas for collaborative activist databases linked to the Internet.

About the Author

Marshall Mayer is founder and Executive Director of Desktop Assistance (www.desktop.org), a Helena, Montana-based 501(c)(3) management support organization that has been providing "constituency building" technologies and related services to conservation groups throughout the western U.S. since 1990.

Mr. Mayer is facilitator of the Conservation Database Listserv, a low-volume Internet discussion group focused on building the capacity of nonprofits to build and use conservation databases. Readers of the *Conservation Database Report* interested in subscribing to the listserv should contact Mr. Mayer at mmayer@desktop.org.

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[18] Other contacts referenced in the report are included in Appendix D.

VI. Appendices

A.   Conservation Database Glossary

B.   Sample Database Security Agreement

C.   Standard Contact Fields

D.   Contact Information

A. Conservation Database Glossary

database
: A computer file that organizes data. When organized, this data becomes information that can be analyzed. The database is usually accessed through a specialized computer program.

database agreement
: A formal agreement between groups involved in a list enhancement process which governs how the data from an individual group can be used. See Appendix B for a sample agreement.

demographic data
: Data that describes social characteristics of individuals or groups, such as age, date of birth, gender, ethnicity, estimated income, education level, etc. Much demographic data is derived from U.S. Census files based on where individuals live, while other demographic data is collected by groups to describe specific individuals.

enhanced data
: Data from conservation groups that has been enhanced with demographic, geographic, or voter data available through data vendors.

geographic data
: Data that describes the geographic attributes of individuals. These attributes usually include county, precinct, congressional district, state upper house district, state lower house district, county district, census tract, census block, and census block group.

hits
: Impressions made on a Web site, usually as a result of a mouse click on a link in a Web page. Hits are the most standard measure of Web traffic.

infobot
: An automated information retrieval system that is accessed by email. Users

	send email to an infobot, the infobot "understands" the content of the email, and appropriate action is taken, such as sending an email reply containing content that users requested.
Internet	The global network of computers that "speak the same language," using standards-based protocols to exchange information between computers.
legacy data	Data from groups that describes the attributes of individuals and their relationship to conservation organizations, such as intact information and membership status.
listserv	An automated information dissemination system that utilizes email lists to distribute information. Most listservs are broadcast only, allowing an organization to quickly and cheaply deliver information to the listserv's participants. Others are interactive, allowing any of the participants to send information to all other participants.
merge	The process of combining two disparate databases to create one database. Often this process will result in duplicate records. See "purge."
narrowcasting	The process of disseminating information based on individual demographic, geographic, voter or other attributes. In distinction to broadcasting, which does not refine distribution based on individual attributes.
purge	The process of removing duplicate data from merged databases.
push	Technology that allows Internet content publishers to deliver information directly to users. Content selection is usually determined by user preferences, but the timing of delivery is determined

by the publisher. In distinction to "pull" technology, where the user demands information for immediate delivery.

voter file vendor

A private company operated for the purpose of collecting publicly available voter data and selling it to organizations such as political campaigns. The voter data is enhanced with additional demographic and geographic data.

voter data

Data about individuals and their voting behavior. Voter data attributes available from most voter file vendors include voter ID number, absentee voter status, date registered, Y/N on each election, registration name, and party affiliation. How an individual voted (for any candidate) is not available.

voting history

The history of when a registered voter participated in elections, by year and whether the election was general, primary or other. Each election is represented, and the values for each election are Y (for voted) and N or blank (no information).

voting propensity index

An index which summarized an individual's propensity to vote based on their voting history. If someone voted in all four primary and general elections in the previous two cycles, their voting propensity index is 4.

B.   Sample Database Security Agreement

The Northern Rockies Campaign conducted a list enhancement project beginning in 1995 with the establishment of the following security agreement. Groups that participated included many of the major local, state, regional and national conservation organizations active in public lands protection in Idaho, Montana and Wyoming. While Desktop Assistance was the lead consultant on the project to build the database, the Northern Rockies Campaign manages its enhanced database.

Database Use and Security Agreement

This database use and security agreement is between the Northern Rockies Campaign, hereinafter referred to as NRC, and Participating Group.

Introduction

The NRC database is a critical component of the NRC's goal to pool our resources and to act in a collaborative manor across the region. The database is designed for the mutual benefit of Participating Groups and the NRC. It will change the way and speed with which the NRC and Participating Groups communicate with its members and activists, give us a true picture of our strengths and weaknesses, and prepare us for outreach activities.

Building and Maintaining

Each Participating Group will make its member list (for Idaho, Montana, and Wyoming) available to NRC electronically. After providing the list the first time, only additions and changes will need to be provided on a quarterly basis.

Depending on size, NRC may contract with a firm to build the initial database.

The database will be stored and maintained on the NRC computer system and will be password protected.

All names generated through direct Campaign activities will be added to this database and maintained (electronically) solely by the NRC.

Participant Groups can be added at any time to the database.

Database Enhancements

NRC will enhance the database. Enhancements may include any of the following: adding telephone numbers, geographic designations (precinct, districts, and county), voter registration information and other information as economically feasible and desired by Participating Groups. Enhancements will be made initially when the database is established and subsequently as the volume of new names warrants.

Any Participant Group is welcome to identify other enhancements that would benefit their group. If a critical number of Groups agree that they too would benefit from that enhancement and if it is economically feasible for NRC to make such an enhancement than it will be done.

All of the enhancements made to a Participant Group's portion of the database will be given, as available, to that group for their internal use.

To maintain the integrity of each Participant Group's names the database will contain a coded notation for each organizational affiliation.

Database Uses

NRC will ensure the names provided by a Participant Group will not be used by NRC or any other Participant Group for purposes of fundraising and/or member solicitation or as part of an electoral program or campaign in support of a candidate.

None of the Participant Group's names will be used for NRC activities without the prior approval of that Participating group. It is assumed that the undersigned party of this agreement has the authority to grant approval and will designate a second person who has such authority in their absence.

Any subset of the database can be used for NRC related activities with prior approval of the Participating Groups at the initiation of either NRC or Participating Group.

Names generated by all NRC activities will immediately be sent, as appropriate and if funding is available, Campaign material that promotes the groups involved in the Campaign and the issues the Campaign is working on. These names will also be made available for all Campaign activities (such as the tasks and tools of the Campaign Plan).

Campaign generated names will be made available to each participating Campaign group once per year for uses that promote that one group or for fundraising, provided that all material clearly identifies the group as a member of the Northern Rockies Campaign and promotes the group's work as a participant in the Campaign.

In addition, Campaign generated names will be made available as soon as possible to groups that substantially participate in coordinated Campaign activities that generate new names. These names will be provided to lead groups -- usually the group that provided the most in-kind staff support for the project -- who will decide among themselves contact efforts. In all cases, the contacts are made on behalf of the groups(s) for uses that promote the group(s) or for fundraising but must be clearly be identified as having resulting from coordinated group participation in the Northern Rockies Campaign.

All names obtained through demographic and license purchases by NRC will be made available to Participating Campaign Groups for NRC related uses including fundraising.

Unless requested by NRC for specific project purposes and approved by the Participating Group, organizational affiliation for individual records will not be indicated on any materials.

Payment of costs associated with use will be addressed on a case-by-case basis.

Length of Use

It is assumed that the database will be maintained and used by the NRC starting in January 1996 and running through which ever occurs earlier: December 1997 or until the NRC is dissolved.

If Participant Groups are interested in having the database maintained beyond December 1997 or the dissolution of the Campaign every effort will be made to find an organization who will be able to maintain the database. If this does not happen all of the Participant Group names will be purged and the database will no longer exist.

Any Participating Group can withdraw from this agreement at any time by sending written notice to NRC.

Date: _____   Date: _____

By: _____   By: _____

I designate the following person as a person who has authority to allow for the use of our names in my absence:

_____

C.   Standard Contact Fields

The following document was prepared by Desktop Assistance in response to repeated requests from groups about how to define contact fields in their databases. The recommendations made also represent a consensus of many database development consultants who specialize in working with nonprofit groups. These contact field standards have been incorporated into ebase™, the database application developed by Desktop Assistance for conservation organizations. While agreement has been reached concerning contact data standards, an obvious next step is to better define standards for other list enhancement database fields for civic, demographic, census, geographic and other data.

Organizations ask us often about which fields should be in their databases. This is becoming more prevalent as groups design their own databases, and intentionally design them to be shared with other groups. They want to know what the "standards" are for field structures.

Unfortunately, there are few standards for databases. There is nothing like the "generally accepted practices" of the accounting field. This is because there are almost an infinite number of data attributes that are being tracked by organizations. There are, however, many standards for keeping contact information for individuals, and this is generally what groups want to exchange.

Through our work in developing shared databases, Desktop Assistance has developed the following field definitions which groups could standardize on to make it easier to exchange information. In fact, these field definitions represent the lowest common denominator of more than two score local, state, regional and national conservation groups, as well as the standards that have been adopted by much larger groups (such as the US Postal Service).

We've broken the fields into seven functional categories. Within each functional category, fields are defined by the most useful subcategories, usually defined by whether you need to select or sort on a discrete part of the category. If you want to share data with a minimum of expense, use the following field definitions, including standardizing on the field names.

1.   Individual(s)

Each individual's name is actually the collection of several distinct parts, not all of which have to be present in each name:

Prefix 1 - such as Mr.
First Name 1 - such as Marshall
Middle Name 1 - such as J. or John
Last Name 1 - such as Mayer
Suffix 1 - such as Jr.
Salutation 1 - such as Marsh

We recommend adding a second set of individual fields to a database, to record the name information of a second person at the same address, but only if all other attribute data -- such as an email address or the answers to a survey -- are exactly the same (if the other attribute data are different for each person, it's best to create a new related -- or householded -- record):

Prefix 2 - such as Ms.
First Name 2 - such as Liz
Middle Name 2 - such as null (or no value)
Last Name 2 - such as Gans
Suffix 2 - such as null (or no value)
Salutation 2 - such as null (or no value)

Many databases will allow you to concatenate (combine) Prefix, First Name, Middle Name, Last Name and Suffix fields to create "name line" fields, such as Full Name Line 1, Full Name Line 2, and Names Line (which concatenates Full Name Line 1 and Full Name Line 2).

Many databases will allow you to concatenate the Salutation fields into a Salutation Line. The concatenation formula can also be written to use the First Name field if there is no value in the Salutation field. This can speed up data entry, since it allows you to leave the Salutation field empty whenever the First Name and Salutation are the same.

2.   Organization

These fields describe the individual, by affiliation, or if the individual fields are blank, the organization or business.

Position - such as Executive Director
Organization - such as Desktop Assistance

3.   Address

A single address line, either a street address or a box address, is sufficient to deliver postal mail. Enter the address to be used for mail delivery in the Address\Delivery field. (Enter "overflow" address information that is to appear on a mailing label in the Address\Supplementary field. Other address information, such as a secondary address, can be stored -- for reference only -- in the Address\Memo field.)

> Address\Delivery   - such as 324 1/2 SW Fuller Ave Ste C2
> - such as PO Box 234

A street address is made up of eight distinct parts, defined by the US Postal Service. Many of these parts have strict abbreviation rules which, if followed, greatly improve the deliverability of your mail using the Post Office's automated sorting systems:

> Number - such as 324
> Fraction - such a 1/2
> Predirectional - such as SW (always abbreviate, don't use
>   periods)
> Street Name - such as Fuller
> Street Suffix - such as Ave (always abbreviate, don't use
>   periods)
> Postdirectional - such as E (always abbreviate, don't use
>   periods)
> Unit ID - such as Ste (for Suite, always abbreviate, don't use
>   periods)
> Unit Number - such as C2

Generally, you do not need to keep the data in the address line broken out into its component parts. However, if you want to produce walk sheets for neighborhood canvassers, you will need to "parse" the addresses. Parsing is most successful when street addresses entered in the Address\Delivery field include only the address elements described above.

If the mail delivery address is a box address, such as PO Box 118, RR 4 Box 87A, or HC 68 Box 98, enter it in the Address\Delivery field using the abbreviations defined by the US Postal Service.

Other address information, such as a building name, should be kept in a separate field to ensure better postal delivery. This will also improve identification of duplicates if your list is to be merged with another list.

> Address\Supplementary - such as Mansfield Building

Use the Address\Memo field to record second addresses, such as a seasonal residence, or the street address for someone whose mailing address is a PO Box. This data will not be used on the mailing label and is for reference only.

> Address\Memo - such as Summer residence, May - September: 403 Cloud Canyon Drive, Helena, MT 59601

4.   City, State, Zip Code

These fields form the last line of a mailing label:

> City - such as Helena
> State - such as MT (always abbreviate to 2 letters, and CAPITALIZE)
> Zip Code - the 5-digit ZIP code
> Zip4 - the 4-digit ZIP code extension (keep separate from the 5-digit code)

Many databases will allow you to concatenate these fields (and add a hyphen between Zip Code and Zip4) into a single "city state zip line."

5.   Telecommunications

These fields are for other forms of communications:

> Home Phone AC - such as 406
> Home Phone Number - such as 4423363 (no hyphens)
> Work Phone AC - see Home Phone AC
> Work Phone Number - such as 4423696 (no hyphens)
> Work Phone Extension - such as 11 (no X or ext.)
> Fax AC - see Home Phone AC
> Fax Number - such as 4423687 (no hyphens)
> Internet Email - such as mmayer@desktop.org (include only deliverable Internet email addresses)
> Universal Resource Locator (URL) such as http://www.desktop.org (for personal or organizational Web sites)

Many databases will allow you to concatenate the area code fields with the phone number and fax fields. We recommend storing area codes separately from the 7-digit numbers because many area codes are changing (it's much easier to replace them if the data is kept separately) and area codes can automatically be entered based on a Zip Code lookup table (when you enter the Zip code of an address, the area code of all the phone numbers -- and in some

cases other geographic or spatial information such as the city and state -- are automatically entered).

Make sure you create fields to store contact information for more modern forms of communication. In fact, the email address field will be the most valuable contact information you can track for an individual (it's cheap to deliver to).

6. Administration

These fields are very useful for internal administration but are also ESSENTIAL for the synchronization of shared databases (exchanging information the second time). Many databases can be set to auto-enter values in these fields.

Record Number - ABSOLUTELY ESSENTIAL. This data must be numeric and unique for each record.

Add Date - such as 01/06/92 (the date the record was added to your database)

Add Time - such as 01:06:09 AM (the time the record was added to your database)

Added By - such as JMM (a unique code for who added the record to the database)

Contact Edit Date - such as 03/19/97 (the date contact information of the record was last edited)

Contact Edit Time - such as 12:21:32 PM (the time contact information of the record was last edited)

Contact Edited By - such as JMM (a unique code for who last edited the contact information)

7. Other

Depending on the nature of your database project, and the kinds of information you need to share with other organizations, there are any number of other fields that could be standardized. For example, if you want to coordinate collaborative actions on issues, you would want to standardize the way you track the kinds of actions individuals take and the kinds of issues that are priorities for them.

Many of the fields above have other attributes, such as the kind of data that can be entered. These attributes are beyond the scope of this memo, but we would be happy to share the attributes that we have developed for other shared databases. They are documented in our Data Dictionary, which we can forward to you upon request in ASCII text, dbf or FileMaker Pro format.

D. Contact Information

The following are contacts for more information contained in the *Conservation Database Report*.

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Adam Eichberg
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The League of Conservation Voters Education Fund also maintains
a directory of its state-based projects and consultants. Contact John
McComb, Network Manager, 202-785-8683 x250,
john_mccomb@lcv.org.