



# Planning

## Preparing for Internet Organizing

### Overview

Incorporating online advocacy into your campaign strategy can catapult your campaign into high-gear, but only if you have a clear plan and set of goals for reaching your activists, and affecting your target. The best way to plan for the Internet in your work is to treat it like any other campaign strategy, an integral part of your overall plan. Too often, groups build advocacy Web sites or send out email action alerts and expect them to generate political output without taking into account the strengths and weaknesses of online media, their organization's capacity to use the medium, or the other components of their campaign.

To illustrate how technology and the Internet can be integrated into an organizing plan, we will refer to a sample organization throughout this document.

### Sample Organization – Welfare Action Center

Welfare Action Center is a state-based organization founded 10 years ago. At its inception, Welfare Action Center focused on education, working to inform women who qualified what state benefits they could apply for. In the last 10 years, they've grown to serve 6,000 members and have 6 staff, and they've increased their program work as well.

2 years ago, Welfare Action Center added an advocacy program area to their educational work. The advocacy program has been a success, but has also changed the direction of the organization. So, this year, Welfare Action Center went through a strategic planning process to help them define their new direction. The process helped them identify four goals for the upcoming year:

Increase membership by 10%

Document the affect of "Welfare Action Center" and educate public about what is really happening to people on welfare

Pass state legislation AB1 to increase access to child care for welfare recipients

Increase individual donations to 8% of the total budget

Recognizing that technology could play a significant role in meeting some of those goals, they also took stock of their technological capacity:

6 computers – 4 Pentium II desktops; 1 iMac; 1 Pentium 3 laptop for the Executive Director

All computers are connected on a Local Area Network (LAN)

All computers are connected to the Internet via DSL

Membership database that a consultant built – tracks member ship and fundraising, but nothing related to advocacy or organizing, includes just a few hundred email addresses for the 8,000 names in their database

Static Web site designed by intern, maintained by staff, but updated infrequently  
An email list put together by the Advocacy Coordinator that includes about 350 activists, some of whom are members, some of whom are not.  
An email list put together by the Education Coordinator that includes about 200 interested individuals, some of whom are members, some of whom are not.

## **Creating the Plan**

Your Internet organizing plan is a comprehensive document that should cover everything from acquiring the technology you need to run your campaign, to recruiting new activists online, to managing your supporters over the long-term. But your plan is primarily shaped by your capacity, which you identify through the assessment process. You may want to reach 50,000 new activists online next month, but if you don't have enough staff, time, money, technology or allies to employ the right tactics to reach that goal, you'll either have to create more staff, time, money or technology, or you'll have readjust your goal. Let's take a look at what should be included in your plan:

## **Goals**

Unless you account for your organizational goals when planning your use of technology, you will spend a lot of time and money developing systems that don't return a value to your organization. You'll simply be developing technology for technology's sake. The famous organizing measuring stick "The Rule of Halves," doesn't really work with Internet organizing strategies, but that doesn't mean you shouldn't set goals for them. For every strategy or tactic, you need to include a concrete, quantifiable result to plan toward. While the success of your campaign can be judged in other ways, setting goals will help you evaluate different strategies and tactics, and determine what works best for your organization. In your first few outings, you may not be able to set reasonable or accurate goals, but with a little time, you'll know more about what to expect. The Welfare Action Center plan has clear goals for each section of their online organizing plan. For example, they could just "recruit volunteers from online activists," but instead, they'll "recruit a core of 25 regular offline volunteers from their online activist pool."

For example, if your goals include passing a specific piece of legislation, your Internet presence should include a way for visitors to contribute to that goal. If your organizational goals include building your membership by 5 percent, your Internet plan should include a place on your Web site for visitors to become members, and an outreach plan to drive visitors to that part of the site.

Before beginning with the Internet planning process, Welfare Action Center would stop to identify its organizational goals:

Increase membership by 10%;

Increase enrollment of women who are eligible in state benefit program by 5%;

Pass state legislation AB1 to increase access to child care for welfare recipients;

Increase individual donations to 8% of the total budget;

and record these in the planning document that will be used to develop the Internet strategy for the organization.

## **Organizational Considerations**

You can set the loftiest of goals, but unless you have the staff, time, money, technology

and know-how, you'll never accomplish them. Once you set your goals, take stock and determine what you've got to work with. Here are some of the things you need to consider:

### **Staff Time**

Deploying Internet advocacy tools takes a significant amount of staff time to implement an outreach plan: executing the outreach, maintaining the web site, and managing follow up communications with your online constituency. A good general rule of thumb is that you need 1 staff hour per week for every 250 constituents you are organizing online. If you don't currently have staff time devoted to using the Internet for organizing, you will have to define this role for someone in your organization, or bring someone in to devote to the plan.

In our example, Welfare Action Center uses some time from each staff member in their ad-hoc Internet organizing strategy. As part of the planning process, they identify which staff are doing which tasks associated with Internet organizing, and then estimate how much staff time is being spent on each task. This will help them better understand their commitment to the Internet strategy as a whole organization:

The Advocacy Coordinator sends email alerts to a small action list she built herself when she needs to mobilize people around a specific piece of legislation. 2 hours per week.

The Education Coordinators send an email newsletter to her own list of individuals every week with news about her program area. 2 hours per week.

The Administrative Assistant updates the Web site when there is time, and answers all emails from the site. 5 hours per week.

The Fundraising Director sends out a monthly e-newsletter to those members who have given their email addresses. 2 hours per week.

The Executive Director writes all of the content for the web site and e-newsletters. 6 hours per week.

The Administrative Assistant responds to all email inquiries. 5 hours per week.

Now that they understand the time they have been investing, they will be better able to predict how much time it will take to execute new strategies in an Internet organizing plan.

### **Campaign length**

If you are organizing for an ongoing campaign with no clear end in site, you will use very different strategies and tactics to mobilize constituencies than you would if you had to end the campaign in a month. For example, if your organization is working on a campaign that will be decided in a year, you could take the time to develop community tools on your Web site that encourage your constituents to communicate with one another and build their relationship with your organization. Taking the time to build that kind of relationship with your organization would mean that you could then generate higher-level actions out of those constituents. They would be more likely to hand write letters or attend community events. However, if your campaign ends in one month, you will only have time to activate your constituents in lower-level ways, probably asking them to send an email to your decision maker.

In the case of our example, AB1, Welfare Action Center's legislative campaign, is going to be sent to the floor of their state legislature in 6 months. They note this in their campaign plan, and consider this as they choose which particular Internet strategies and

tactics they can employ in their organizing plan. For example, if their campaign were only 2 months long, they would set much lower goals than they would for a 6 month campaign – perhaps 1,000 emails sent from their Web site rather than 3,000.

## Infrastructure

How you can use the Internet to organize will depend a great deal on what your technology infrastructure can support. For example, the speed of your Internet access will determine how many emails you can send to your activists network over a given period of time. If your computers do not have enough memory or a fast enough processor, you will have trouble running the software needed to deploy many Internet organizing tactics. And, if you don't have the right software, there are many tactics you won't be able to employ at all. Some of the technology infrastructure you should account for includes:

<b>Technology</b>	<b>Considerations</b>
<b>LAN (Local Area Network)</b>	There are a multitude of advantages to having your office workstations networked. But, there is one specific reason that you should have a LAN before embarking on any Internet organizing strategy. When your computers are networked, you can share access to the Internet, making it possible for all of your staff to have access to the Internet all the time. This is critical when speed is of the essence – when a reporter sends you an email asking for a quote by their 2pm deadline, for example.
<b>Hardware</b>	You've got to have machines with enough memory and processing power to send 1000 emails easily and handle the software you'll need to manage your Web site and database. Document what you've got, but know that a good baseline machine for Internet organizing will have the following: 128 Mb of RAM Pentium III processor 5 gig hard drive
<b>Software</b>	Software is another tool that will significantly shape what kinds of Internet strategies and tactics you can employ. What database software you use will determine how it can relate to your Web site. Your web editing software will influence what kinds of content you can provide, and how you provide it. You should take stock of your software, its advantages and disadvantages.

<b>Infrastructure budget</b>	In conducting the infrastructure assessment, you will probably identify an area where you need to make some upgrades. Identifying your infrastructure budget ahead of time will help you prioritize what changes you can make and when.
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## Database

Your web site and offline organizing will allow you to collect a lot of information about your supporters. That information is useless to you unless you have some way to organize and manage that data. For example, if you collect information about the districts in which your supporters live and store that information in a database, you can send very targeted emails to mobilize constituents in specific districts. Or, if you track the issue interests of each of your supporters, you can target mailings or phone calls to supporters of specific issues as opportunities to engage them arise. More importantly, you can use a database to track the history of your supporters with your organization. Knowing how often they take action, what kinds of actions they take, and how often they donate is essential information. Without a database, you lose the ability to communicate effectively with your constituents. Here are a few things you should take stock of about your database:

<b>Issue</b>	<b>What to Look For</b>
<b>Updating and maintaining the database</b>	Data is gold. It's very important that you get the right information about the right people into your database, and that none of that data is subsequently moved or tampered with. Additionally, it's important that information get entered into your database in a timely manner. The integrity of your data can only be maintained when you have staff that are dedicated to upholding these principles. In assessing your database, you need to identify who is responsible for updating and creating new records, and how much time they dedicate to make this happen.
<b>Access</b>	The database should be the filing cabinet for a variety of information, from contributions to favorite issues. This being the case, there are probably several people in the organization that need access to the database, either to enter or view data. If you are to keep your database updated and make its contents useful to the entire organization, you will need to provide access to the right people. Limiting access to the database to a central computer, for example, will create inefficiencies in data management as people struggle to gain access to the information.

<b>Reporting</b>	Does your database organize information easily and quickly in a way that helps you understand who your supporters are? Your database should provide reports that aggregate information about the data in your database, like payment histories for individuals or by season, demographic information, or geographic range. These kinds of reports will help you analyze who your supporters are and how they support you.
<b>What kind of information you collect</b>	Most organizations have databases that collect information about individual contributions, but you can use your database to collect many other types of information that will inform you about who your supporters are, which is important to organizing them well. For example, if you are trying to mobilize supporters to come to a district meeting with your legislator, you probably only want to invite your long-time supporters and any experts on the issue you'll be addressing. If your database collects information about how long your supporter has been involved, or whether or not they are experts on particular issues, you can easily identify a group of potential folks to organize into this event. Without the database, you could spend hours combing your lists to find the right group of people for the event. Your database should have the capacity to collect the kinds of information that will help you organize people more efficiently.
<b>Platform</b>	Can your database grow? Does it do what you need it to do? Is it a true database or a spreadsheet? In many ways, your database platform determines the answers to those questions. For example, you may have hired a consultant to design a small database for you a few years ago in FoxPro. However, you may have expanded your program work and now need the database to do new things. Finding a consultant to modify your FoxPro database will be difficult. Documenting the platform and its limitations will help you determine if your database has the capacity to help you meet your Internet organizing goals.

<b>Budget for upgrading your database</b>	In conducting the database assessment, you will probably identify an area where you need to make some upgrades. Identifying your database budget ahead of time will help you prioritize what changes you can make and when.
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## Web site

Your web site is a pivotal piece of your Internet organizing strategy. It gives your supporters access to your organization 24 hours a day, 7 days a week, provides an efficient and effective format for generating political output like letters to the editor or emails to decision makers, and is essential to tracking the effectiveness of your Internet organizing efforts. Your web site will likely be the central piece of your Internet organizing strategy, and you will have to understand what it does now, as well as your capacity to update and upgrade your site to get the most out of your Internet organizing. Here are some considerations when evaluating how you may be able to use your web site in your Internet organizing:

<b>Issue</b>	<b>What to Look For</b>
<b>Updating and maintaining the Web site</b>	<p>Updating the Web site is an essential part of integrating the Internet into your organizing. When you are using your site as a "home base" for your online communications, you will need to post new materials and updates about your goals to continue to engage your supporters. For example, if you plan to distribute a petition to your constituency, you will need to create a version that can be downloaded, and then create a page that your supporters can visit to download the file. In a fast paced campaign, keeping the site updated can be a very busy job.</p> <p>If you update the Web site in-house you will need to ensure that you have the staff time and technological capacity to make updates quickly and correctly. If you out-source your site management, you will need to factor in the turn-around time at your vendor each time you need to get new material onto your site, and account for the costs.</p>

<b>Interactivity</b>	The first advantage of the Web site that comes to mind is its ability to push your message out at an audience. Your Web site can and should be much more than this static, one-way form of communication. Allowing your supporters to sign up for mailing lists, send emails to decision makers, or tell you about themselves are all essential to creating an Internet organizing plan that works. Interactivity benefits your organization by: providing a new mechanism for delivering your message to decision makers that's available all the time; allowing user to have a deeper experience with your organization, and increasing the likelihood that they will visit your site again; allowing you to learn about your supporters so you can deliver information they want, creating longer lasting relationships.
<b>Site statistics</b>	Just as you can measure the success of your petition drive by counting the number of signatures you collect, you can measure the success of your Internet strategy by reviewing site statistics. Site statistics will tell you everything from how many unique visitors came to your site to how many times a specific page was viewed to how many times a specific file was downloaded. These are all valuable pieces of information for evaluating the success of your campaign.
<b>Budget for Web development</b>	It's unlikely that your Web site will do everything you want it to do in your Internet organizing plan, and that you will have to invest some resources in building it out. You will need to identify a budget for this kind of expense before you create your Internet organizing plan.

## Allies and Opponents

After identifying your goals and organizational resources, you need to articulate who you can count on for additional resources, and who may not be so friendly. Let's take a look at some of the resources your allies can provide you:

<b>Resource</b>	<b>Description</b>
<b>Place a link</b>	Visibility is crucial to making any campaign successful. Getting a link on a well-known, well-trafficked web site can boost your visibility significantly.
<p><b>Contextual Links</b> Don't just have your allies link to your homepage, have them drive traffic to where it matters – the page you most want visitors to see. Your allies can just as easily link to <a href="http://www.goodgroup.org/takeaction">HYPERLINK "http://www.goodgroup.org/takeaction"</a> <a href="http://www.goodgroup.org/takeaction">www.goodgroup.org/takeaction</a>, and it increases the likelihood that people will visit that page and take action!</p>	

<b>Borrow a list</b>	There are two big advantages to being able to contact an ally's list. First, it's a fresh set of eyes for your message. Secondly, they're hot prospects, or people very likely to sympathize with your cause and relate to your organization. If you're allies will lend their list to you, you can reach them with your message, and effectively track any follow up.
<b>Send to a list</b>	For the same reasons you're hesitant to share your lists, your allies may not want to hand over theirs. So, ask if they'll send a message to their list on your behalf. While you don't get to follow up with the data in any significant way, you do get the added advantage of your ally's name recognition. The list members are likely to respond to a message from the group they know and love.

It's also just as important to know what your opponents may be up to. In your plan, make sure your document what any opponents may be up to:

	<b>Description</b>
<b>Message</b>	Document the messages your opponents will likely use, allowing you to be proactive and cut them off at the pass. Get your messages out first!
<b>Allies</b>	Who will your opponents try to team up with? If it's an individual or organization that could go either way on your issues, get there first and do the wooing! If it's an individual or organization that you can't win over, note what assets that ally may bring your opponent.
<b>Tactics</b>	What are your opponents likely to do? Determining which tactics they are likely to deploy will help you pick the tactics that will have the biggest impact against them.

## Targets

You will need to evaluate your target in order to determine how you will influence this decision maker. By what kinds of actions (letters, emails, phone calls, etc) will they be influenced? Is there an end to the comment period (a deadline by which all activist messages must be received)? Are they concerned only with comments from a specific geographic area? Each target group, whether it is a government agency, a large corporation, or the general public, has unique needs and specific interests. You will need to do your research and customize your advocacy campaign to generate messages that can influence your target in the ways you would like.

Once you've identified how you should deliver your message to the decision maker, you

can plan for the technology you will need to do that. Once you know how many messages you will need to get to your decision maker, you can begin planning for outreach strategies that will generate the volume you will need. In our example, Welfare Action Center has a challenge ahead of them. They need to target their state Senators. The Advocacy Coordinator called a few staffers in the capital and determined that sending emails was not going to be effective, no matter how many they sent. But, if Welfare Action Center could generate just a few dozen letters to each of their target's offices, they would make a difference. Now, Welfare Action Center knows that they will need to build a tool that will allow their constituents to send individualized letters to their targets, and that they should aim to get 35-50 letters sent to each office. Since they have 12 key targets, that's about 600 letters. Of course they will include many other ways for their constituents to contact the legislators, since activists may not want to take the time to write a letter, but this will be their primary ask.

## **Tactics**

### **Outreach**

Your larger organizing plan will incorporate many strategies to reach people offline. Phone trees, fliers, and ads, are all part of our tried and true methods for letting your constituents know about your organization. You'll need to incorporate a variety of strategies for promoting your online organizing as well, from online strategies like viral marketing and banner ads, to offline strategies like collecting email addresses while tabling. Whatever tactics you decide to use, plan for them like you would any other organizing tactic. In the Welfare Action Center plan, there are several outreach tactics, including emails to their constituents, and incorporating their Web site address in their printed materials.

### **Re-engagement**

Your Internet organizing plan will help you grow your constituency. However, your job is not over after your new supporters take one action. You will need to plan to keep your new supporters engaged in your organization. Your overall organizing plan will probably include some direct mail, phone calls, or events to keep your supporters involved. You can also use the Internet to keep people engaged and should plan for it just as carefully. The Welfare Action Center plan includes publishing an online newsletter, sending out monthly email updates, and a listserv for their most involved volunteers to communicate with one another.

## **Don't Forget**

Knowing what to plan for in an Internet organizing campaign is only half the battle, you also have to know how to plan for it. Of course, you probably already know how – planning for organizing online is really just like any other planning process. But, here are a few things you shouldn't forget to include in your plan.

### **Budget**

Many non-profits look at technology as one-time expenses, and don't plan accordingly. Rather than developing a plan and budget for the technology needs of the organization, they will assign technology expenses to budget categories like "Office supplies." Purchasing and maintaining technology has to be budgeted for in a more systematic way than we budget for pens. You should build line items for hardware, software and training

into your budget, and include those items in your funding proposals as well. A tip: remember the 70/20/10 rule. About 70 percent of a nonprofit's technology budget should be in people -- or "wetwear" -- while 30 percent should be in hardware and software.

### **Integrate with Offline Plan**

The real benefit of Internet organizing is its ability to act as a force multiplier in your total organizing efforts. You should strive to create a synergy between your on and offline organizing, but that's only possible when you plan for them together. For example, collect email addresses while at rallies, tabling, or canvassing. Then, use your growing email lists to publicize your offline events. Consider the Welfare Action Center plan. They plan to collect new email addresses at each offline event they host, which allows them to invite more people more efficiently to their ensuing events.

### **Message**

You probably spent a significant amount of time developing your three or four central messages, so you should use them wisely. Include the messages you want to use with each tactic right in your plan. Every email, advertisement, or Web page in the plan should also include the most appropriate message. This will help you stay on message throughout the course of your organizing, and ensure that your online organizing tactics complement the rest of your organizing. In our example plan, the Welfare Action Center has chosen to focus on specific messages each week, leading up to the vote in the state legislature. They've denoted the messages they will focus on at the top of their plan.

### **Identifying responsibilities**

Many of the components of your new plan will fall outside and in between the areas of responsibility you have defined within your organization. Writing, editing, and sending out an email alert to your constituents will often take input from a variety of staff. Sending an email action alert is a good example. The message itself needs to be crafted by the program or communications staff to ensure that it stays on message and is compelling. However, there are specific formats and certain limitations to communicating in email that have to be accounted for. For example, email messages shouldn't be too long, and any links or email addresses need to be formatted appropriately. These issues, as well as the management of the actual send, should fall onto the shoulders of the staff responsible for technology. Use your plan to delineate who will be involved and at what points.



