



# Building Ongoing Activist Relation- ships:

Re-Engagement and  
Online Community

## Overview

### Why you want to continue to engage people

As most businesses know, it is much cheaper to keep your existing customers than to find new ones. Email is a cheap and almost instant way to keep in contact with your members and activists. The objective is to keep your activists coming back – without burning them out or frightening them away, and without letting your lists get cold. Although this is mostly common sense, it takes a little planning ahead of time to make sure your investment in marketing and recruitment pays off.

Just because people have given you their email address does not mean that you have organized them. They are not really yours to keep until you make them want to stick around. To put it a different way, organizing is what you do AFTER you get them to sign the postcard. This is no different than organizing offline, but the new capabilities, norms and expectations of the Internet force us to address a number of issues and questions in a new light.

The key thing to remember is that the same principles of offline organizing apply to the online counterparts. But before we get there, let's take a moment to talk about how you're managing your email list. The tool you choose will have a big impact on what you can with your list.

### List Management Tools

There are myriad ways to manage a list of email addresses, but three methods are most commonly used: email address books, email distribution lists, and databases. Each has strengths and weaknesses, and you should consider each before settling on a system.

**Email Address Books:** Keeping your lists of email activists in your Outlook or Netscape

address book seems like a good idea at first. You know the program and are comfortable using it. And, for this reason, it can be effective for a small list. However, once your list grows beyond 25 people, this system is unwieldy at best. Additionally, using your address books limits your ability to easily segment your list and send more targeted messages. You can't collect, search, and sort on demographic or political information. Most importantly, it just becomes too time consuming to manage that many email addresses in software that wasn't designed for it.

**Email Distribution Lists:** Email distribution lists are designed to handle large numbers of email addresses. Basically, they allow the users to email a single address, i.e., choice@choice.org, and the email is sent to everybody who is on the "choice" list. The software also allows people to automatically subscribe and unsubscribe to the mailing list. Distribution lists reduce the time and trouble of maintaining email lists in Outlook or Netscape Messenger which aren't intended to mail large numbers of people. The downside is that you can't collect any more information about your constituents with this software, and you can't personalize your messages, everyone gets the same message. This system is fine for organizations who only want to send announcements, or newsletters to their constituents.

**Database Driven Software:** Databases do a lot more than allow you to collect and sort information these days. Many databases allow you to create and send communications right from the database itself. This is the best and most flexible option for most non-profits. Using the database, you can store large quantities of email addresses, but you can also collect and store other information about your constituents. Then, you can search in your database for particular segments of your list – like everyone who's volunteered 3 or more times and is subscribed to your email list – so that you can send extremely relevant messages. Most of these database programs also allow you to personalize your messages, using mail merge features to create a unique communication for each individual on your list. The downside is that maintaining these systems is time consuming. If the system is going to be useful, the information in it has to be current and correct. There's no technology out there that can maintain data integrity, it takes good old-fashioned elbow grease.

## Basic Principles of Successful Re-Engagement

**Have a plan.** Set goals for how you would like your supporters to engage in your organization, then make sure you have the capacity to meet those goals, and manage your email list in a way that facilitates these goals.

**Get to know your supporters.** Use surveys, activity profiles, and actual conversations to record what motivates your supporters, as well as how they want to be involved in your organization.

**Layout different roles for your supporters to fill.** Let people find a role that is right for them, instead of fitting everyone into the same box. Meet people where they are and build a ladder for them to get more involved.

### Have a Plan

In the world of organizing, an email list is a one-dimensional space. Your interactions with email lists happen entirely in the very flat space of the Internet. As an organizer, you should strive to create a community – a three-dimensional space where interactions

happen on many levels. This means that you'll work to involve email supporters in your organization in a variety of different ways. It won't happen without a plan though – very few email supporters will take the trouble to actively seek out other roles to play in your organization, so you'll have to lay the groundwork for them.

Before you set about recruiting a new list of supporters, create a plan that will address these three areas:

**Setting Goals:** Set goals for participation at different levels of engagement with your organization (100 donations, 2,000 letters to Congress)

**Involving New Supporters:** What different roles or activities do you want your members to participate in? Are you preparing to support those roles with necessary tools and information? How are you going to allocate the necessary resources (staff time, content, technology)?

**Creating a Healthy List:** How much time do you have to devote to feeding your list (growing it in terms of numbers and kind of information collected) and maintaining your list (ensuring the quality of the data)?

## **Setting Goals**

Surely your organization does more than recruit and manage email progressive email lists. If you have a multi-faceted organization, you'll need supporters to engage in those many facets, so set goals for how many people on your email list will fill those roles. Set goals for money fundraised, actions taken, volunteers recruited and more. Mine your email list for the many different needs of your organization.

Email communications is still a relatively new field for non-profits, so there are no hard and fast rules about what to expect. Set goals that feel reasonable in your gut, see how it works out, and you'll know something more concrete for the next time. Here are a few good techniques for setting goals:

**Integrate Organizational Goals:** Larger organizational goals should translate into specific goals for re-engagement. For example, if the number one priority for your organization is increasing the number of individual donors, the number one goal for your email list should be converting lists members to donors. If you have an organizational goal of increasing volunteerism by 10%, then make sure you set a goal for your email list that will meet part of that goal.

**Set benchmarks for your success:** Setting goals is fine and good, but you won't ever get to celebrate meeting your goals if you don't know when that is. Make sure your goals are quantifiable so you'll know when you've met them. Even if you do not reach them, measuring your efforts will help you plan in the future.

## **Involving New Supporters**

Once you've set goals for how to engage your list, you've got to consider your organizational resources. Will you have the staff time, money, and equipment needed to engage supporters in meeting the goals you've set? Specifically, you'll need to consider two areas: the roles required to meet your goals, and the scale of supporters required.

For example, you may set a goal of converting 10% to real live volunteers, knowing the value of engaging people in this face-to-face way. However, if your organization does

not currently have a volunteer program, or a volunteer coordinator, this goal will likely go unmet. Avoid setting goals that will create roles for your email supporters that you can not facilitate.

Additionally, you'll need to address the issue of scale. Even if you have a volunteer coordinator, she may be overwhelmed if you succeed in converting 10% of your list to volunteers, and a volunteer that goes unused will soon cease involvement with your organization in any capacity. Another potential scale problem is not generating enough output. You may decide that converting 10% of the list to volunteers seems doable, but in the end won't be enough people to meet your volunteer needs during peak times. You'll need to adjust your goal upwards, or consider lowering your expectations for volunteer hours this year.

Here are some tips for deciding how you'll involve your supporters, and how many to involve:

**Plan Around Available Resources:** Re-engagement requires:

Content (someone has to write email messages and update the website regularly – what will be posted?)

Staff Time (someone has to answer all the emails!)

Tools for sending to large lists (most vendors provide this, but it's not free)

### **Creating a healthy list**

Your email list is an organic being – it will change constantly – and like any organic being, will require specific care unique to itself. Your task is to care for the list in a way that will maximize your output from the list. For the most part, that means thinking out ahead of time when you will contact the list and what you will contact it about. Clearly, circumstances will arise in which you need to change your plan, but surprises are much easier to handle when you've got an existing plan to work from. Since every email list is made up of different kinds of individuals, there are no hard and fast rules about creating a healthy list, but these techniques should help you manage your list effectively:

**Ask yourself this question:** How am I serving the list? If you're thinking of sending a message to the list, make sure that the list will find some value in the message.

**Time Your Messages:** Look ahead to fixed dates in your organization, like your annual new member drive, and plan what your messages will be. If you can see that there may be a long lull between actions (e.g. State Legislature won't be considering legislation on your issue for six months), you will need to plan a few messages for the interim with as constructive an activity as possible. A good rule of thumb – contact your list every three to six weeks.

**Recognize Holidays and Current Events:** It is often effective to tie messages to holidays and major current events, especially ones that are relevant to your issues (e.g. a 'Peace on Earth' New Year's Day message for a nuclear disarmament group). It makes your communications more relevant, and makes you more human. Look at your calendar and plan ahead.

**Don't Overwhelm People:** You can't annoy people into taking action. Make your

messages short, direct and to the point, and don't send too many.

**Always Encourage Members to Tell Their Friends:** Activating the social networks that make up the Internet is still the most powerful key to getting your message out and recruiting new people. Always incorporate a 'Tell-A-Friend' ask or mechanism in your email alerts and website actions.

**Personalize Messages:** Choose list software that allows you to send messages with a personalized salutation, if possible (i.e. Dear Fred). This helps make your communications more human - even though people know you are using software, they know you are going to some trouble to reach them in particular.

**Always Identify Yourself, Provide Context:** Always include something in the header or footer of the message that says why this person is getting a message from you, who you are, a link for more information, and instructions for unsubscribing. Also, if you can refer to a way the individual was added to your list (signed up at the web site, signed up at a rally, etc.), it will help jog their memory and increase the likelihood that they stay involved.

**Point People to Your Web Site:** Include links to your web site at every opportunity. If you send out an update or alert on handgun legislation, for example, include a link to the page on your web site with background on that issue. Even if you do not have a page specifically devoted to an issue you are emailing about, link to your home page. Encouraging repeat visits helps build a bond of familiarity and trust.

**Have a Privacy Policy:** Understand it, display it, and obey it. If you integrate your email list with your direct mail list (and you should), make sure that Internet people are handled consistently with your privacy policy. Usually this means placing a 'no trade' source code in their records, which will keep their names from being traded with other organizations. Nothing angers people like abusing their trust.

**Track Response Rates:** If you send a message to your list inviting people to an event, keep track of who shows up so you can see how effective your message was. Tracking response rates like this will help you get a feel for your list on a macro-level – what actions they like to take, what issues interest them, the tone of messages they find most compelling. Tracking response rates also helps you know your list on a micro-level – what works for individuals. Response rates are often the best indicator of the health of a list. If rates are consistently dropping, then you probably need to try a new strategy, or go back to tip number one: ask yourself if you're truly serving your list.

**Count the Unsubscribes:** In the same way that a list with an increasing response rate indicates good general health, an increasing rate of "unsubscribes" can mean that your list is unhealthy. After each message, track the number of individuals who unsubscribe from your list. A one-time spike may indicate a poor message, but steadily increasing rates will require you to rethink your strategy, and fast.

**Answer Your Email:** Process the feedback you receive when you send out messages. Find an efficient way to respond when appropriate, and try to listen.

## **Get to Know your Supporters**

The first rule in any form of communication is to know your audience. You may not know everything about the audience you are reaching (or trying to reach), but it is important to start putting together elements of a description. Are they young, middle-aged, or old? Are they predominately male or female? What can you say about their interests? What intellectual, emotional, moral or physical needs do they fill by participating in your organization?

It may be helpful to sit down and create a verbal portrait (25-50 words) of the supporters on your email list, even if you describe them broadly, or try including descriptions of different sub-groups of your list – who are these people?

You probably know more than you think about your email supporters. However, getting to know your supporters is not something you do just once, but it is an ongoing process. Knowing who your audience is allows you to answer the two key questions: why do they care, and how do they want to be involved? Knowing the answer to each is the only way to maintain a long-term relationship. Here's how to start to know who makes up your email list:

### **Build Profiles**

Start building profiles for the supporters on your email list. Direct mail folks (commercial, political, and non-profit) have been building customer profiles for years. For decades, companies you've never heard of have been building, layering, swapping, and selling lists of magazine subscribers, credit card purchases, driver's license numbers, financial activities, etc. This is really what the Information Economy means – information about economic transactions has become nearly as valuable as the transactions themselves. We're not suggesting that you do anything unethical, but we have to start making the available technology work for us. Why? Because targeted marketing is more effective and more economical.

Here's a hypothetical example that illustrates the benefit of building profiles: Let's say you are lobbying your state legislature to set aside more funds for state parks. It is late in the session, and your appropriations bill is nearing approval. Support is starting to crumble, however, and you need a quick blast of citizen input. The problem is that you've already alerted your whole list about this issue twice in the last two weeks, and you're afraid of driving people off your list. What if you had the ability to distinguish between people that are familiar with this issue and committed to it, and people that have just joined your list? What if you knew which people would pick up the phone and call if you asked them to, versus the people that would feel overwhelmed and unsubscribe from your list? This knowledge can make or break the effectiveness of your campaign.

The key to building profiles for the supporters on your list is to have a good database and staff that are committed to recording the information. Make sure your database has a place to record key information, and that you have the staff power to do the data entry. Here's an outline of information you might want to capture about the individuals on your email list:

The basics you want to know about your online activists/members:

When they joined  
What was the first action they took  
What kinds of actions they want to take in the future (phone calls vs. letters, etc.)  
What issues they are most interested in  
How often they will take action

Here are some techniques for capturing information and creating profiles of your email supporters:

**List enhancement:** Compare your online list to offline databases, such as membership lists or state voter files. Database consultants can merge your lists and provide you with an analysis.

**Surveys:** You can create a form on your website or use a more sophisticated third-party tool, such as Zoomerang (<http://www.zoomerang.com>). You can also send a short survey via text email, but tabulating these is usually tedious and inefficient.

**Tracking actions:** There are lots of ways to track actions. Have sign-in lists at events, ask people to report back when they complete an action, use "cookies" on your website to find out who's downloaded that flyer for your next event.

## **Create Different Roles for Your Supporters to Play**

People will always have different needs, levels of interest, and comfort levels when it comes to taking action. Remember that one of our main goals in using the Internet is to attract and recruit people who are new to taking action. At the same time, many of the people on your email list will be engaged already – familiar with the existing tools and techniques of citizen advocacy: letters, calls, faxes to decision-makers, letters to the editor, petition drives, house parties, etc.

Some of those who take an initial action on your website or sign up on your email list may never take another action again. Some may lurk on the list for months before taking action. Others will do almost everything you ask and wonder why you aren't doing more. The question becomes - How do you keep the really interested people engaged without scaring away the ones who are interested but not as active?

The answer is to create different paths, or roles, for people to take, while still keeping focus in your organization. Do not try to fit everyone into the same box. For example, the term 'activist' is familiar and convenient to those of us who plan grassroots campaigns, but it may scare some people away if you try to tag them with that label. The standard term for sustaining donors, 'members,' doesn't always apply either, because it implies a level of affiliation and support that email list subscribers may not necessarily feel. Both of these categories may work in your situation, but keep in mind who your audience is before you label them. Most simply consider themselves concerned citizens.

There are numerous ways to create various action paths, and the right approach will depend on the demands of your particular organization. Here are some important considerations:

Don't assume that people on your list are as fired up as you are. Some will need more information to make up their minds.

Find out when people sign up how much they plan to be involved in ongoing efforts. Set clear expectations about what people can expect when they sign up – how often they can expect to hear from you, what you will be sending them, etc.

Generally speaking, you always want to be involving your supporters in higher level activities – increasing their exposure to and support of your organization. This is generally referred to as moving them up the leadership ladder (or pyramid, as it's also often referred to). Notice that the Leadership ladder isn't focused entirely on the Internet, that it requires people actually (gasp) interact face to face. That's really key. You can not sustain a relationship with your supporter if you only ever interact with them online (unless they're one of those freaky Internet people who never come out of the house, but most people are not like that). But, you can continue to use email to mobilize these people, because you already know they respond to that kind of communication. Here are some examples of the different kinds of activities that you might want to provide your supporters at different levels of the leadership ladder:

<b>Leadership Level</b>	<b>Activities</b>	<b>How to Mobilize</b>
New – responded to up to 3 email action alerts	Email action alerts, viral marketing alerts, download a flyer and post in your neighborhood	Do a search in your database of everyone who's new or has taken a few online actions, like sending an email to a decision maker, then use email to reach them
e-activist – responded to 3 email action alerts or more	Invite to events, download a petition and take to community then mail in, write a physical letter, write a letter to the editor, make a phone call, man the ticket taking table at the fundraising event, come to the mailing party and stick labels on things, solicit for membership	Find everyone in the database that's responded to three or more action alerts. Send them an email for anything involving the Internet (like downloading a petition), but start phone banking for other activities. They'll enjoy hearing your voice!

Passive participant – has attended an event or volunteered at least twice, but not led anything	Invite to head a committee or lead an event, solicit for a special appeal, lead a phone tree section	Find everyone in the database that has shown up somewhere in the flesh a couple of times (or seems super-enthusiastic), and call them. You'll need to give them some context for their new leadership role and explain why they'd be great. That works much better over the phone than via email.
Veteran Volunteer – coordinates events frequently, knows your staff better than you do	Lead a project (like the newsletter, or volunteer coordination)	Find these folks in the database (though you probably have them on your speed-dial since they make your job so much easier), and invite them in for a face-to-face heart-to-heart (or tet-a-tet).

Decide on levels of engagement that make sense for your organization, activities that are appropriate, and then start moving people up. How? You'll also need to scan your database for clues about your activists. The person who took every online action last year should certainly get a call from your volunteer coordinator. The person who only responded to one alert probably doesn't want all of your alerts and may respond to more if you send him or her less email.

## Success Story

Just as the Internet is forcing businesses to focus more on customer service, social change advocates and organizers have to learn that in the Internet Age, we can only be successful when our goals meet our activists' needs. We are competing for the public's attention, and must deliver something of value to them. Of course, this doesn't mean we should start delivering their groceries, but we must meet people where they are. For example, one of the most successful Internet campaigns so far caught fire precisely because it filled a need for a large segment of the online public.

Two successful California software developers conceived the MoveOn.org campaign during the time leading up to President Clinton's impeachment in the fall of 1998. The website was set up so that visitors could sign a petition demanding that Congress immediately censure the President and then move on to the business of the country. Visitors could also send an email to their friends inviting them to add their names to the petition. Their 'flash campaign' caught fire, and without any paid advertising or media coverage nearly half a million people signed their petition within two months.

The campaign was not ultimately successful in preventing President Clinton's impeachment, but it formed the nucleus of numerous other groundbreaking efforts. More importantly, however, it demonstrated that the Internet was now a viable medium

for grassroots organizing on a large scale. But the success of MoveOn.org has been difficult to imitate, in large part because of the extreme circumstances that gave rise to the campaign. With President Clinton's scandal investigations dominating news coverage, a large portion of the public had reached a saturation point. The MoveOn.org campaign was an ideal vehicle for these people to give voice to their disgust.

Just as the MoveOn.org campaign filled an initial need for people when they first got involved, Wes Boyd has taken care to maintain the MoveOn.org lists with consideration and forethought, providing the activists with experiences and opportunities that meet their needs and expectations about the organization. The result? A well-honed list of activists who consistently take action when they receive alerts. Many of those activists have also contributed actual cash to the cause as well, sending campaign contributions in the 2000 election to candidates identified for support.

Once you've brought online activists into your fold, you should strive to keep them there – as e-activists and more.

## **Conclusion**

A re-engagement strategy is essential to the success of any online organizing effort. You cannot build and maintain effective grassroots networks online if you do not have a plan to keep people active. Since your goal is to engage citizens in the political process, it is worth remembering that – like writing – Engagement is Re-Engagement.

Effective re-engagement will result in more energy being spent on managing existing relationships, and less 'churn,' or constant recruitment and loss of new members. Proactive management will stimulate participation and growth of your online network or community.

This solid foundation will help you build relationships of trust with your members. This will lead to greater retention levels, faster list growth, higher participation levels, and more political muscle to achieve your ultimate goals.

In this context, you should consider various forms of online community and interaction as means to your ends. Building online community requires considerable time and often money, and carries some risk and uncertainty as well. Don't jump in without a plan or without sufficient resources to execute it. At the same time, remember that your campaign is only as strong as the voice of its members. Find ways to let them speak for themselves, and take the time to listen.

## **Re-Engagement Techniques**

Here are more extensive discussions of some of the most important techniques of successful re-engagement.

### **Planning Your Alerts in Advance:**

One of the most important factors in a good re-engagement strategy is balance. You

must find a good balance between burning out your list and letting it get cold, between providing too much information and too little. The only way you can achieve this balance is to plan your email and web alerts in advance.

For example, just because you can email your list once a week doesn't mean that you should. Most casual list participants will only want to be contacted every 6-8 weeks or so, while more engaged activists may want to hear from you every 2-4 weeks with a new action. Some organizations publish informational newsletters on a weekly or daily basis, but we are focusing on the mechanics of action alerts. Generally, action alerts must be separated from newsletters to be effective.

Look at your campaign timeline, and try to anticipate when you will need to send alerts. You may not be able to pinpoint the dates with precision, but at least map them out on a timeline.

**Answering the email (my In-Box runneth over):**

Once you get in the business of sending out lots of email, you can expect to start receiving plenty yourself. Like Charlie Brown, you will need to get an extra suitcase for all those Valentines you will get. And you will need to devote resources to monitoring, answering, and learning from it.

**Response Time is a Factor.** In the most crucial communications, where your supporters are communicating questions or suggestions to your campaign, responding promptly will help cement a positive first impression or stem a concern. Remember, word of mouth is often the quickest and most effective way news is spread on the Internet, and you don't want to get a reputation for being unresponsive.

**Assign Someone the Responsibility.** If you leave this task unassigned, it may not be done well. Answering email is something that junior staff can easily do with direction.

**Personalized Replies Work Best.** Always reply directly to the writer's concern. Be short and to the point, and always sign the note. For commonly asked questions, you can prepare a fact-sheet, but you should present it as such.

**Process the Feedback.** Learn from what people are saying. Have the person who answers the mail keep track of how many unsubscribe requests resulted from a particular email.

Good Comments are always worth sharing with other staff, and incorporating into future marketing materials, newsletters, reports to funders, etc.

Questions can help you refine your message, especially if they come from people who say they are hesitant to take action until they understand more. What information do they need to make up their minds?

Angry comments, or flames, are a part of doing business. They can be regarded as a badge of honor, in a way, and they can also tell you about the arguments and messages your opposition is using.

The Internet as a medium tends to lend itself to harsh venting, so you shouldn't take it too seriously. It is rarely worth your time or energy to reply to these messages. However, if you receive letters that are particularly offensive, abusive or threatening, you should keep a record of them. Most Internet Service Providers have Terms of Service that prevent the use of their servers for harassment or hate speech. You can remind flammers of this, or you can report them yourself if it becomes a problem.

In general, plan time to answer positive comments and questions each day, and plan to handle list remove and address change requests in batches, perhaps weekly. Always make sure you have made all the requested removes and address changes before sending out your next message. If your list management software makes this process difficult, work with your vendor to find ways to process requests in batches.