

# online outreach tools guide

Trying to decide if you should invest time and resources into tweeting or blogging? Have you heard the terms but are not sure what they mean or how they fit into your work?

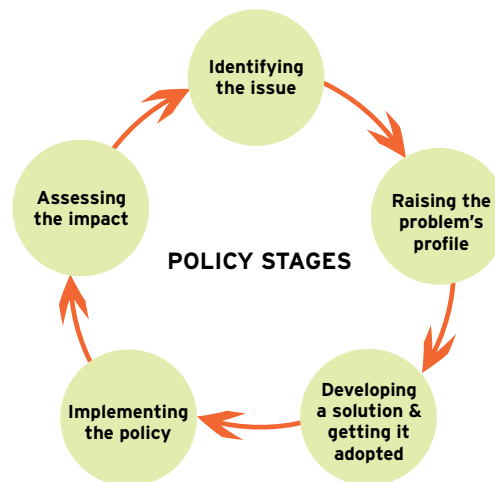
This can be confusing and challenging in an environment where every newest or shiniest technology is being touted as a “must do.” That is why we have created a guide that outlines the strengths of specific Web tools in relation to communications strategies and a policy change framework.

## Online Communications in the Policy Change Process

When considering how Web based outreach tools can be useful in your advocacy and communications efforts, it is important to begin with your goals. Remember online efforts are best when created in a way that integrates with offline efforts and actions. Focusing on what you want to accomplish will help point you to the strategies and the tools that will be most effective.

### How to Use this Guide:

Begin by looking at the policy stages model and honestly assessing where your issue is today. Some issues are brand new and the problems to be addressed are not clearly articulated or documented. Other issues or problems are already known, but they lack viable policy solutions. Still others have policy solutions in place, but their implementation is problematic. Because policy issues at different points in this cycle will require different strategies, determining where issues are, along with how far they need to advance, is essential in determining which tools will get you to your goals.



Adapted from Coffman and Campbell, "Tools to Support Public Policy Grantmaking," *The Foundation Review*, Vol. 1, Issue 3

- 1. Understand the Challenge** - Consider where your issue, and more specifically, your policy objective, is in the model of policy stages.
- 2. Set a goal** - Where do you want to move your issue? Identify the policy stage that is your goal. Be realistic with your time frame.
- 3. Identify strategies for success** - What will it take to move this issue forward? Refer to the chart on the following pages, starting with the orange bar at the top titled "Communications Objectives." Think about which would be the most appropriate for where your issue is and your goal.
  - Increase Credibility
  - Raise Awareness
  - Encourage Dialogue
  - Mobilize Supporters
- 4. Review** which online tools (found on the left side of the chart) are rated as most effective for each objective. Descriptions of each tool and a short example follow the chart to inform your thinking.

As you see, many of these tools can be used to achieve multiple objectives - this is not a black and white environment, however, each tool does have strengths and limitations that should be taken into consideration. **While these ratings show each tool's potential, the results rely in a large part on the execution.**

Developed by:



### **A general note on the guide:**

This guide is intended to provide a framework for thinking about and discussing the use of online tools and an attempt to outline their strengths and limitations. The rating of the online tools according to specific communications objectives is subjective and will evolve as we learn more as a sector.

### **Electronic eyes and ears**

It can be helpful to get a pulse on how your issue is being covered or discussed online before diving in. Free and fast research monitoring can be helpful when identifying where your issue is or while tracking implementation consequences and reactions. Finding others that are covering your issue and reading and tracking their feeds and conversations. Also helpful can be signing up for Google Alerts for specific terms or identifying which keyword terms are most commonly used to search for information on your issue. More information on all of these can be found at: <http://tinyurl.com/wildapricot-monitoring>

### **No cost, but not “free”\***

Most of these services and applications are free to use, offering free storage space for images, video files and blogs. This has made creating an online presence much easier, but do not be fooled! To be effective all of these do require a significant commitment of time to be effective.

### **Progress takes time**

Long-term change can only occur through continuous engagement with your audience over time. With blogs and social networking sites, for example, regularly updating content and engaging with supporters will help to establish credibility, raise awareness of the issues and, ultimately, increase the likelihood for future mobilization.

### **Mix and match**

Keep in mind these tools are most effective when used in conjunction with each other. As you may notice in the examples and cases, most involve combining the best of several of these tools. Create and share - for instance, upload a video to YouTube, then share it on social networking sites and embed it on to your own Web site or blog.






### **Audiences**

Defining what audiences to target is an important question not only in determining which online tools will be most effective, but also how to use those






tools. Note which tools and approaches will reach NEW audiences and let them know about your issue, and which are better for activating and encouraging the supporters already committed. As mentioned in the descriptions, younger audiences are using different networks and services than some niche groups (i.e. Twitter is used by many reporters, but not so popular with teens). Research your audience's online behaviors before deciding which tools to use.

### **Listen**






Knowing your audience is critical in determining what and how often to post. For example, it may be beneficial to “tweet” several times a week, but if you send messages to your Facebook fan base several times a week, you may end up not only decreasing the potency of your messaging, but also losing fans due to the perceived bombardment of messaging. Focus on connecting with what interests them. Once again, researching your audience's online behaviors will help to determine what online tools to use and how to use them.

Online Tools	Summary	Communications Objectives				
		 Increase Credibility	 Raise Awareness	 Encourage Dialogue	 Mobilize Supporters	 Costs*
<b>Online Advertising</b>	Keyword ads, Web banners and other advertising can be targeted specifically to get you in front of people interested in your issue. It can be part of persuading, but because you are relying on individuals to “click” on your ad it is not a powerful mobilizer.	☆☆☆☆	☆☆☆☆	☆☆	☆☆	(*See page 2) \$-\$\$\$
<b>Email newsletters/ e-updates</b>	Email delivers information straight to a person's inbox, and effective in increasing visibility, establishing credibility, raising awareness. Email can also assist in mobilizing. However, this is primarily a one-way communication, making it difficult to encourage dialogue.	☆☆☆	☆☆☆☆	☆☆	☆☆☆	\$
<b>SMS text</b>	Texting allows for visibility and can mobilize audiences quickly due to the ubiquity of cell phones being with people at most times. However, due to its short-handed nature and one-way communication, it is not a dialogue tool. Users must be aware that they may be charged per text - so they must want to receive the information.	☆	☆☆	☆	☆☆☆☆	F
<b>Blogs</b>	Blogs offer a quick and easy way to post information online that maximizes awareness and creates an archived public record. The format allows readers to ask questions and receive responses, making it effective in fostering dialogue and, to a degree, mobilizing followers.	☆☆☆☆	☆☆☆☆	☆☆☆☆	☆☆☆	F
<b>Micro-blogging</b>	Micro-blogging (aka Twitter) can be effective in increasing visibility and awareness over time. The set-up can foster exchanges and rapid mobilizing to the select audiences that are using the tool. Its short-hand nature limits its ability to engage in dialogue.	☆☆	☆☆☆	☆☆☆	☆☆☆☆	F


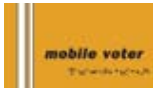
LEGEND: ☆ Minimally effective    ☆☆☆ Somewhat effective    ☆☆☆☆ Effective    ☆☆☆☆☆ Very effective    F = Free    \$ - Less Than \$50/\$100    \$\$ - Less Than \$250    \$\$\$ - More Than \$250




Online Tools	Summary	Communications Objectives				
		 Increase Credibility	 Raise Awareness	 Encourage Dialogue	 Mobilize Supporters	 Costs*
<b>RSS feeds</b>	The ability to instantly push out relevant information updates makes RSS feeds great for building visibility and awareness, and can be instrumental in mobilizing those who are signed up to receive the feed. As a one-way broadcast tool, it is not designed to encourage dialogue.	☆☆☆	☆☆☆	☆☆	☆☆	(*See page 2) F
<b>Photo Sharing</b>	Selective use of powerful pictures can be instrumental in getting your compelling story out - raising awareness and visibility as well as inspiring action/ mobilization when used in conjunction with a technology that can pass on the images. Photos can help establish credibility in statements. Limited dialogue can take place through viewer comments.	☆☆☆	☆☆☆☆	☆☆	☆☆	F
<b>Audio Sharing/ Podcasting</b>	Recordings can be powerful tools for storytelling and conveying information in a non-written format for awareness and visibility. Free to post to services such as iTunes, subscribers can receive regular updates. Dialogue is limited to comments.	☆☆☆	☆☆☆	☆☆	☆☆	\$
<b>Video Sharing</b>	With more technologies able to play video and larger bandwidth available, the visual impact of video captures attention. If the content is engaging for your audience, video-sharing is effective in increasing visibility and awareness as well as inspiring mobilization. Viewers are sensitive to time, so keep them short! Video also creates a public record that can be widely accessed, and is particularly powerful when partnered with tools that promote sharing. Limited dialogue can take place through viewer comments.	☆☆☆	☆☆☆☆	☆☆☆☆	☆☆☆☆	F




LEGEND: ☆ Minimally effective    ☆☆☆ Somewhat effective    ☆☆☆☆ Effective    ☆☆☆☆☆ Very effective    F = Free    \$ - Less Than \$50/\$100    \$\$ - Less Than \$250    \$\$\$ - More Than \$250

Online Tools	Summary	Communications Objectives				
		 Increase Credibility	 Raise Awareness	 Encourage Dialogue	 Mobilize Supporters	 Costs*
<b>Webcasting</b>	Webcasting can be an effective tool in increasing visibility, credibility and awareness if promoted and used to leverage the event after the fact. Viewer comments and questions can encourage dialogue. Livecasting can be a dialogue or mobilization tool by making an event or meeting more accessible to people beyond the physical meeting place.	☆☆☆	☆☆☆	☆☆☆	☆☆	(\$\$) <small>(*See page 2)</small>
<b>Social Bookmarking</b>	The viral nature of social bookmarking makes it a useful tool for building awareness and disseminating messages. If the content is posted to interactive sites (e.g. blogs, social networks), the potential for dialogue exists. For longer term mobilization, audiences can help spread the message.	☆☆☆	☆☆☆	☆☆	☆☆☆	F
<b>Wikis</b>	Wikis can aid in raising awareness and provide space for collaborative information sharing by creating a public archive or record on a topic or issue. Content on the site is updated by site visitors, so credibility is only as good as the administration of the site. Its structure allows for groups to build on existing knowledge or work with additions that allow for some discussion. Notifications can be sent to members for limited mobilization capabilities.	☆☆☆	☆☆	☆☆☆	☆☆	F or \$
<b>Widgets &amp; Applications</b>	Facebook Widgets, iPhone applications, etc. If creative and customized for your specific audience, there is potential to increase visibility and awareness. Applications can be used to attract the attention of potential supporters and, ultimately, to inform them about the issues. Depending on the application design, they can be customized to help mobilize.	☆☆☆☆	☆☆☆☆	☆☆	☆☆☆	\$\$\$




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Online Tools	Description	Examples
<p><b>Online Advertising</b></p>	<p>We've all seen them - the sponsored links that show up on the top and right hand side of the page when you do a Google, Yahoo or Bing search. They are part of the search engine's advertising program so that your Web site or campaign microsite will appear when a topic or issue is searched for. These ads can dramatically increase exposure in front of people that are actively looking for information on your topic. Customization is the name of the game - choosing the message to match each keyword term. You can set the amount you spend per day or month to fit with even meager budgets. Google's AdWords has a grant program for nonprofits.</p>	<p><b>Literacy Center.Net</b></p> <p>LCEN envisions a world where every child can read, and to that end, promotes literacy lessons to help parents and teachers educate their children. It has seen a marked increase in traffic since it began running an ad on Google. More than 125,000 people have clicked on the organization's Google ad, helping LCEN to increase its outreach.</p>
<p><b>Email newsletter</b></p>	<p>Email is still the "killer app" since it remains the core way the greatest number of people comfortably prefer to receive information. An excellent tool for building and maintaining relationships with constituents and stakeholders, email allows you to send out information on what you are doing and make requests for action from those with whom you have already established a connection.</p>	 <p>Freepress advocates for media reform. Their easy sign-up on the homepage has few barriers and lets the user decide if they want Daily Headlines on the issues, periodic Action Alerts or both. More than 500,000 people are currently on their subscriber list and actively advocate based on alerts.</p>
<p><b>SMS Texting</b></p>	<p>For some demographics, cell phones are now used more often for texting than phone calls. Cell phones are also the fastest growing technology for those not connected to the Internet. Short messaging services (SMS) can send short messages immediately out to any list you have, or you can create an automated system that provides information if a user sends you a text.</p>	 <p>TXTVOTER registered more than 70,000 young voters in advance of the 2006 election. The multi-pronged campaign leveraged mobile phones, a peer-to-peer registration model and the power of existing grassroots organizations, to register and mobilize their constituencies. They also sent reminder texts to voters the day before the election, and found they increased the likelihood of voting by 4.6%.</p>

Online Tools	Description	Examples
<p><b>Blogs</b> (Blogger, Blogspot)</p>	<p>Blogs are a technically simple way to have a Web presence that can be set up quickly and exist independently or be integrated into existing sites. Blogs provide the ability to easily post information, easy subscription, monitoring and commenting tools that create great opportunities for dialogue. When consistently updated, blogs can have an impact on public discourse. Blogs are more than just articles, they're conversations. Readers engage by posting comments to posts. Blogs provide an archive online and can be found by anyone who searches the Internet.</p>	 <p>CUAV is an organization dedicated to preventing and fighting LGBT (lesbian, gay, bisexual, transgender) violence and oppression. They kept supporters up to date about an ongoing trial. By creating a blog (<a href="http://www.gwenaraujo.blogspot.com/">http://www.gwenaraujo.blogspot.com/</a>) and continuing to update and post articles to continue the coverage long after traditional media lost interest, keeping a public dialogue going.</p>
<p><b>MicroBlogging</b> (a.k.a. Twitter)</p>	<p>A social networking service that allows users to send and receive short messages ("tweets"). Tweets are text only and up to 140 characters that are posted on the author's profile page on the Twitter site and are sent to "followers" that sign up to receive your updates. A direct and unmediated conversation amongst you and your audience is the key, with comments and replies to posts sent to all subscribers. Many of the more known cases of use highlight the real-time nature of the conversations that can be helpful in mobilizing since the service has integrated into other applications such as on smart mobile phones.</p>	 <p>In the weeks prior to the 2008 election Twitter Vote Report was formed. Election protection groups used Twitter to collect real-time information on voter problems from the public that were instantly mapped by zip code. (e.g. "#wait:120" #92008 meaning that the wait time is 120 minutes at polling station in 92008 zip code). This allowed patterns and hot spots to be identified while action could still be taken, rather than collect reports that are compiled after the fact. Over 11,000 messages were posted during the November 2008 election.</p>
<p><b>RSS Feed</b></p>	<p>Stands for Really Simple Syndication. The ability to push your news stories or Web updates out to those who sign up to receive them without requiring them to come to your site.</p> <p>Alternatively, your site can also sign up to have news feeds appear as content on your site based on keywords you select. For example, you could sign up for any story from Yahoo! Health on "diabetes" to automatically appear on your site.</p>	 <p>The National Women's Law Center site, <a href="http://www.NominationWatch.org">www.NominationWatch.org</a>, utilized RSS feeds during the review process for John Roberts' nomination to the Supreme Court. They created a blog and invited people to sign up for the RSS feed to retain and engage audiences by pushing breaking news and real time updates to keep them informed on the topic.</p>

Online Tools	Description	Examples
<p><b>Social Networking sites (Facebook, MySpace, LinkedIn)</b></p>	<p>Go where the people and the conversations are already happening! Social networking sites such as Facebook and MySpace are merely taking word-of-mouth marketing into the electronic age. You are looking to use your supporters to share their love and concern with their friends to widen your reach.</p> <p>Note each site has different audiences and affinities - LinkedIn is more for professional contacts, MySpace for youth and the music-minded. There are niche social networks that are effective for targeted messages (e.g. Glee, Hi5, Faithbase).</p>	 <p>The Lupus Foundation of America conducted outreach to Facebook users and increased fundraising 790% and membership by 584% in a six-month period. They now have over 32,000 members on their Facebook Cause page and have a community that shares their experiences with the disease, promotes offline events, and mobilized for 2009 Advocacy Day on Capitol Hill.</p>
<p><b>Photosharing (Flickr)</b></p>	<p>Why keep compelling photographs in your archived files? Let images tell your story and allow others to contribute theirs. Sites such as Flickr and other online photosharing services allow users to upload photographs, store them, organize them, tag them, share them, discuss them and explore others'. The "groups" feature in Flickr makes it easy for people to contribute photos from their individual accounts to a group pool and provides some ability to moderate the content. This can be useful for making images available to reporters.</p>	 <p>The Humane Society conducted a Photo Caption Contest and invited people to create a caption for a photo of little baby harp seals. The caption could be funny, cute, endearing...whatever! Over 2,500 entrants uploaded their pictures to Flickr. They were used in the Humane Society's Protect the Seals campaign on Facebook and other places online, driving viewers to a petition getting more than 86,000 signatures.</p>
<p><b>Audiosharing/ Podcasting</b></p>	<p>Named in relation to the ubiquitous iPod, portable and on-demand audio files (a.k.a podcasts) allow audio content to be heard by more people in more places. The recorded audio clips can be played on a computer from a Web site or on other devices such as an mp3 player, cell phone or iPod. The audio recordings can share information or tell a story. The key is to make them interesting to your audience.</p>	 <p>As a bipartisan policy organization, CSIS researches and analyzes policy initiatives and solutions. Their podcasts are generally around five minutes long and are among some of the most popular on iTunes, where they can be downloaded for free. Through their podcasts, CSIS has expanded the reach of who is hearing about its research and policy analysis.</p>



Online Tools	Description	Examples
<p><b>Videosharing</b> (YouTube, Vimeo, Dogooder.tv)</p>	<p>We have long known that video is a powerful medium, but traditionally only the very large, wealthy organizations or networks could afford to use it. Now, with cheaper technology and free online video sites, anyone can put video to use - reusing existing video or creating new footage.</p> <p>Use video to introduce your network or your issues, provide evidence, encourage action.</p>	 <p>Children's Defense Fund created the Your Truth Aloud! Campaign asking young people to record a video no longer than two minutes telling elected officials why all children need comprehensive health coverage now and upload it to their YouTube Channel. They collected over 100 videos and more than 13,000 views of their videos. They also recruited for volunteer video project organizers to collect video statements from their community. The channel had links to actions that could be taken online as well as offline.</p>
<p><b>Webcasting</b></p>	<p>There are two kinds of webcasting. Livecasting is the ability to deliver a live video in real-time to Web viewers. Video-on-demand is the ability for Web users to view archived video footage at any time. Generally, long videos are not watched online, but short summaries can be edited and used to extend the life of your event. Live casts can link in groups long-distance to extend the reach of your event without much cost.</p>	 <p>Taking their annual invitation-only conference and growing it to a second location via livecasts allowed TED to more than double attendance while still keeping the intimate feel of the small size at the original site. The second site had its own activities and discussion. The speaker content is also available on demand on their Web site throughout the year and has generated huge amounts of traffic while attracting new audiences.</p>
<p><b>Social Bookmarking</b> (Digg, Delicious)</p>	<p>A method for Internet users to store, organize, search and share their bookmarked Web pages. In a social bookmarking system, such as del.icio.us, users save and "tag" Web pages with one-word descriptors. The story and associated tags are saved not just on your computer, but are shared with the group you designate, allowing you to quickly pass on articles of interest and remember them later - by topic. Reviewing the terms used by others to tag articles is also telling.</p>	 <p>National Wildlife Federation has found success with social bookmarking and tagging. They decided to try out Digg and submitted an article on Endangered Cats. The content was great and many people "voted" for it. It was ranked high enough to get put on the coveted frontpage of Digg. By the end of the month the article had 48,000 views. (More at Netcentric campaigns.org)</p>

Online Tools	Description	Examples
<p><b>Wikis (PBWorks, Wikispaces, Wetpaint)</b></p>	<p>Do you want to collaborate beyond your network? Wikis allow for documents to be shared and edited by many people. Visitors to the site can also comment, creating a collective memory and record. Wikipedia.org is an example of a wiki that uses the collective knowledge of many to serve as a resource.</p>	 <p>We Are Media is a wiki project where more than 100 nonprofit technology professionals have pooled knowledge resources and developed training materials. WeAreMedia.org helps nonprofits learn about how to use social media effectively drawing on knowledge from everyone in the group. With information continually being shared, updated and revised presentations are remixed and delivered as trainings to nonprofits at conferences and workshops across the country providing the most up-to-date material.</p>
<p><b>Widgets and Applications</b></p>	<p>Small, self-contained and portable creations that are intended to be used and integrated onto a user’s mobile device, computer desktop or existing profile page on a social networking site. Widgets and “apps” push your content out and place it in their world, which can be an effective technique for extending the reach of information and creating easy action steps. For real traction, the widget or app has to be more than “cool,” it has to be useful.</p>	 <p>Monterey Bay Aquarium, as part of their effort to advocate for sustainable fishing policies and practices, created an iPhone application of their Seafood Watch guide that is also available as a small paper pocket card. The app includes regional fish purchasing and consumption recommendations. A sushi guide lists fish by Japanese name as well as common market name. This has expanded the reach of the information and keeps it at within reach of a users fingertips.</p>

In the end, with policy change, the long-term measure of success is evident - was the desired policy goal accomplished? That said, knowing social changes takes years, it is important to create milestones that can track progress along the way.

These milestone metrics can take the form of qualitative or quantitative results. Both are useful - providing you with cold, hard facts on how many and who are responding as well as reviewing the information that tells you more about the context and the story behind the numbers. We have assembled a list that can get you thinking about possible ways to assess progress with each strategy and of metrics tool.

1. It is important to determine from the start how you will be assessing each strategy and the effectiveness of each tactical tool. Align your assessment with your goal in mind and consider that responses may take place online and offline. Your metrics should attempt to track both. Think about how online actions may translate to offline action.
2. Once you know which metrics to track, take a baseline measurement and record your starting point.
3. Evaluate as you go. One of the most powerful aspects of online tools is the ability for real-time feedback that allows you to analyze and modify as you go - building on what works and modifying what does not.

### List of Possible Milestone Metrics

Quantitative	Qualitative
(The Hard Numbers)	(The context, the story behind the numbers)
Subscribers	Quality of engagement/interaction
Unsubscribers	Relationships built
Members/Fans	Reputation enhanced
Views/Web site traffic	Loyalty strengthened/developed
Blog mentions/Re-Tweets/Links	Insight into audience interests
Media coverage (online and offline)	Perceptions and understanding of issues
Responses/comments to a post	How people are finding your content
Donations	Reactions to legislative/advocacy goals
Submissions	
Forwards to friends	
Increase page rank	
Petitions signed	
Calls/emails to policymaker	
Event turnout (virtual and offline)	

## Tips and Considerations

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### Other Resources:

- Common Craft has a great series of short videos that provide explanations of many of these tools “In Plain English” - we recommend you take a look. ([www.commoncraft.com](http://www.commoncraft.com))
- Idealware provides candid, Consumer-Reports-style reviews and articles about software of interest to nonprofits. Helping nonprofits make the software decisions that will help them be more effective. ([www.Idealware.org](http://www.Idealware.org))
- Techsoup is a comprehensive technology resource for nonprofits. It has articles, message boards, and offers the latest professional hardware, software, and services at discounts to nonprofits. ([www.techsoup.org](http://www.techsoup.org))
- Nonprofit Technology Network (NTEN) is the membership organization of nonprofit professionals who share technology solutions across the sector. They offer webinars, research, articles and conferences. ([www.NTEN.org](http://www.NTEN.org))
- NetCentric Campaigns provides great case studies, examples and direction on how-tos for networks trying to put technology to use in their work. ([www.NetcentricCampaigns.org](http://www.NetcentricCampaigns.org))
- Beth Kanter’s Blog - How Nonprofits Can Use Social Media - Beth posts daily with news, tips, ideas, that experiment with and exchange links and resources about the adoption challenges, strategy, and ROI of nonprofits and social media. (<http://beth.typepad.com>)
- KDPaine’s PR Measurement Blog has lots of news and techniques, and tracks developments in the world of PR research and evaluation. (<http://kdpaine.blogs.com/>)

### Our Methodology

This guide is based on the analysis and opinions of five social media practitioners with review and feedback received from network, evaluation and communications professionals. This is intended to provide high-level guidance on strengths and weaknesses of specific tactics and tools and determining which are most appropriate for your communications goals. It is not comprehensive, as we know this environment is ever evolving. This guide does not provide specific detail on implementing but does direct you to resources that provide more in-depth direction. We welcome your comments and input on your experiences, successes and challenges in working with online outreach tools to continue to improve the guide. Please contact us at [toolkit@causecommunications.org](mailto:toolkit@causecommunications.org).

*Thank you to the many people we received invaluable feedback and comments from over the last few months in developing this tool. In particular, Laura Quinn, from Idealware, Madeleine Taylor and Pete Plastrik from Center for Network Impact, Julia Coffman, Center for Evaluation Innovation. Also instrumental in the development was Neuriel Shore, USC Annenberg School graduate student and Cause intern!*