

# Chapter 14: Campaign Tools

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## **Introduction**

This chapter covers the tools used for political campaigns, including election campaigns and activist campaigns.

The Dean presidential campaign revealed two contradictory things about online grassroots organizing.

- First, online organizing tools can be extremely powerful – they helped catapult an unknown governor of a small state into the most popular and most well-funded candidate early in the primary season.
- Second, online tools and techniques are not enough to take a campaign to victory. They must be closely integrated with traditional media and face-to-face organizing.

The lessons that jumped to national prominence in 2003 have been understood by internet-savvy activists since the mid-90s. Around that time, Jonah Seiger and Shabbir Safdar collaborated on an internet campaign to oppose the Communications Decency Act, which would have imposed strict controls on internet content. They described the lessons they learned to Jon Lebkowsky, in an unpublished article at the time:

Jonah said “The political process happens in the real world, and then you have to engage in the real political process. The net works successfully only when it's integrated into an overall campaign strategy. Independent of a larger sense of what you're trying to accomplish and leveraging other forms of communication and other ways of getting your messages out to the world, the net has no *particular* advantage, except that when it's used effectively in an integrated campaign, it's the killer app. Added Shabbir, “In the real world, all that stuff only means something once you use it for something. The biggest online adhocracy in the world means nothing if nobody calls a member of Congress, nobody goes to a Town Hall meeting, nobody writes a letter. I mean a paper letter, not an email.”

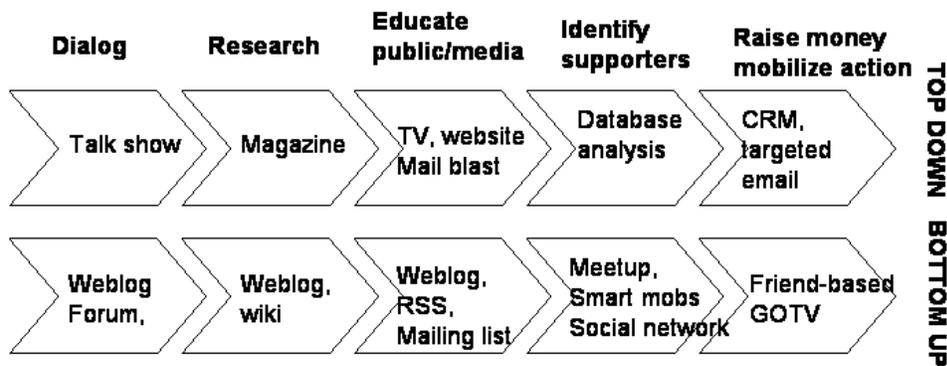
This chapter is written with two very different readers in mind: activists and campaign organizers, who are looking to bring innovative uses of the internet to their campaigns, and tools-builders, who are looking to adapt internet tools to activist and election campaigns. For activists, this chapter will have tips on evaluating familiar tools, and background on newer tools, like weblogs and wikis. For toolmakers, this chapter will provide background about the processes in which the tools are used, a context which is critical for successful implementation.

### Campaign Application and Campaign Tools

In order for online tools to be used successfully, they need to be integrated with the processes of campaigning. Coordinating a candidate or activist campaign involves an integrated series of processes.

- Dialog and deliberation
- Researching policies and strategies
- Educating the public and media
- Identifying supporters
- Gathering and motivating supporters
- Raising money, mobilizing action

There are tools and techniques supporting each process of these processes.



The most familiar tools for electronic organizing, websites and electronic mail, translate traditional top-down organizing tools and techniques into electronic form

- *websites* are online versions of campaign brochures and commercials.
- *campaign email* is an electronic version of print direct mail

The internet enables activists to use these traditional tactics fairly inexpensively, and with a greater level of personalization and targeting.

In addition, there are new generations of electronic organizing tools in earlier stages of adoption. These tools use the internet to facilitate “bottom up” self-organization

- *online forums, weblogs, and wikis* are used for bottom up co-ordination and communication among activist groups
- *networking services* are used for groups to self-organize, online and in person
- *chat, instant messaging, and SMS* enable activists to “swarm”

Traditional advocacy campaigns are hierarchical and highly structured. The techniques for using “top-down” websites and email, which fit the model well, are fairly mature at this point. Meanwhile, the techniques for using the “bottom-up” tools are still evolving as organizations ranging from the Dean Campaign to election-watchers in Kenya are pioneering techniques that take advantage of these new tools. Effective online organizing involves coordinated use of multiple tools and media. There is an emerging set of effective practices for using network tools together in conjunction with traditional media and tactics. Change won’t occur in an instant. In general, change happens faster when new tools fit existing patterns, and more slowly when the tools and patterns need to evolve together.

	Unstructured	Structured
Top Down	Forum	Mass email Campaign CRM CMS Mailing list
Bottom up	Wiki SMS Instant Messaging	Technorati Weblog Meetup Peer GOTV Ryze, Orkut

Assembling the tools for an online campaign takes a bit of work today. There is no single toolkit that pulls together all of the components needed for networked campaigning. Campaigns and

organizers must assemble their toolsets from existing components. The interface standards to integrate tools and systems are still emerging.

Fortunately, there is a growing array of open source tools that campaigns can adapt and customize. And there is an emerging network of tools developers working on the applications, interfaces, and services required to support online campaigning.

## Website

The first campaign websites extended traditional publishing techniques to the internet, using websites to publish news and background information about a specific candidate or activist campaign.

Sites that are updated frequently or that contain more than a few dozen pages benefit from the use of a content management system (CMS). These systems automate the process of posting content, reducing the bottleneck and skill level required for a webmaster.

Content management tools vary in sophistication. Capabilities of more sophisticated content management tools include:

- personalization, enabling the targeting of content based on a user's profile
- workflow, controlling contributions based on end-user roles
- multimedia, supporting audio, video, and animated content.

In addition, some general-purpose content management systems include modules for specific purposes, such as polling, chat, forums, weblogs, etc.

Bringing in a content management system to automate a website involves more than the installation of a software package. The process of implementing a content management system includes:

- designing the site structure to fit the interests of the site's constituents (press, undecided voters, volunteers, etc.).
- setting up categories so contributed content can be organized on an ongoing basis
- analyzing and designing the content contribution workflow for the organization
- defining metrics for reporting on website success, including number of users, repeat visitors, visitor demographics, and more.

A campaign site can be used for much more than brochureware. A campaign website can enable campaign volunteers to build support for the campaign on the ground.

In the words of campaign professional Nathan Wilcox,

“Any traditional grassroots activity is more easily organized online. If a campaign has successfully clicked with the public and built a viable online supporter base, the next step is to let the grassroots organizers, and the supporters themselves, get to organizing. House parties, tabling at local elections, passing out fliers at sporting events, door-to-door canvassing, and any other sort of field activity can be promoted on your Web sites and e-mail newsletters. Supporters can RSVP online and even organize their own events. Old-fashioned door-to-door politics are back in a big way, thanks to the latest tech tools.”

“Use your online network to organize volunteer outreach efforts to nursing homes, churches, and working neighborhoods. Ask volunteers to distribute pamphlets and posters from the Web site to potential supporters who don't go online or don't have net access.”

These processes involve using content management systems differently, with:

- sections and permissions for campaign volunteers
- the ability to upload and download materials such as sign-up sheets, posters, flyers, and videos
- CMS tools and technical support for groups of supporters to host their own websites

## CMS Tools

There are many content management systems available, including

- enterprise systems sold to corporations for hundreds of thousands or millions of dollars
- hosted services provided by application service providers
- open source systems with no software licensing costs.

Open source systems provide the “source code” free to review and customized to fit the needs of the campaign. Most open source systems are free of license charges, although providers might charge for documentation, service, and support. The typical lack of license fees and the power to customize can make open source solutions attractive to campaigns.

But the lack of license fees does not mean that an open source solution is free of cost. It takes time and skilled work to install and configure a content management system, and to customize it for the needs of the campaign. Systems also need ongoing support and maintenance, requiring skilled labor.

There are a variety of licenses with different conditions governing the user's ability to modify and redistribute the code. The GNU Public License, or GPL, is a popular license that requires users who modify the software to distribute all modifications with a GPL. Campaigns considering open source should review the license of the package to confirm that the license matches the project's objectives.

In order to use a content management tool successfully, campaign managers need to:

- involve the stakeholders who will use the system, including content creators and IT managers
- understand the types of content that will be published using the CMS, and the processes for publishing the content
- consider the skills within the organization required to maintain a system.

The evaluation process should consider the three phases of the content lifecycle: authoring, management, and publishing, as well as the business and support terms of the provider.

<b>CMS Selection Criteria (adapted from How to Evaluate a Content Management System, <a href="http://www.steptwo.com.au/papers/kmc_evaluate/index.html">http://www.steptwo.com.au/papers/kmc_evaluate/index.html</a>)</b>		
<b>Authoring</b>	<b>Integrated authoring environment</b>	The CMS must provide a seamless and powerful environment for content creators. This ensures that authors have easy access to the full range of features provided by the CMS.
	<b>Separation of content and presentation</b>	It is not possible to publish to multiple formats without a strict separation of content and presentation. Authoring must be style-based, with all formatting applied during publishing.
	<b>Multi-user authoring</b>	The CMS will have many simultaneous users. Features such as record locking ensure that

		clashing changes are prevented.
	<b>Single-sourcing (content re-use)</b>	<p>A single page (or even paragraph) will often be used in different contexts, or delivered to different user groups.</p> <p>This is a prerequisite to managing different platforms (intranet, internet) from the same content source.</p>
	<b>Metadata creation</b>	<p>Capturing metadata (creator, subject, keywords, etc) is critical when managing a large content repository.</p> <p>This also includes keyword indexes, subject taxonomies and topic maps</p>
	<b>Powerful linking</b>	<p>Authors will create many cross-links between pages, and these must be stable against restructuring.</p>
	<b>Non-technical authoring</b>	<p>Authors must not be required to use HTML (or other technical knowledge) when creating pages.</p>
	<b>Ease of use &amp; efficiency</b>	<p>For a CMS to be successful, it must be easy to create and maintain content.</p>
<b>Content management</b>		
	<b>Version control &amp; archiving</b>	<p>Strict version control is necessary for legal accountability, backup and disaster recovery. A simple but powerful interface must be provided for these features.</p>
	<b>Workflow</b>	<p>Decentralised content creation relies heavily on a powerful workflow model, that can be easily customised, and is resilient against organisational change.</p>
	<b>Security</b>	<p>Adequate security levels and audit trails must be in place to protect the integrity of the content.</p>
	<b>Integration with external systems</b>	<p>A CMS is typically only one of a number of systems used to present information on the intranet or website.</p> <p>An enterprise-wide CMS will only be successful if it can be cleanly integrated with existing business systems.</p> <p>The mechanisms for achieving this must be fully documented, and based on open or industry standards.</p>
	<b>Reporting</b>	<p>The CMS must provide an extensive range of reports, for both users and administrators.</p>

		<p>Ideally, the system should pro- actively report on any issues that arise.</p> <p>Support for customised reporting is also desirable.</p>
<b>Publishing</b>	<p>The publishing engine takes the content stored in the repository, and generates the final pages. While this may be a dynamic or batch process, the same basic requirements apply. Key requirements may include:</p>	
	<b>Stylesheets</b>	<p>Final appearance is controlled through the use of stylesheets. This provides flexibility and expandability.</p>
	<b>Page templates</b>	<p>Overall page layout is specified via page templates. Ideally, a non-technical interface should be provided for managing this.</p>
	<b>Extensibility</b>	<p>It must be simple to integrate code "snippets" (or equivalent) to provide additional publishing functionality. The CMS must support a process of "continual improvement" in interface design.</p>
	<b>Support for multiple formats</b>	<p>The CMS must publish to multiple formats, such as: HTML (web), printed, PDF, hand-held (WAP), and more.</p> <p>It should be possible to add support for additional formats, which will be necessary as new standards evolve.</p> <p>In order to achieve high-quality in every format, it is critical that the content be separated from presentation at the time of authoring. This allows distinct stylesheets to be used for each output.</p>
	<b>Personalisation</b>	<p>Different information is presented based on either user profiles, or metadata in the source content. This is typically required for large "portal" websites.</p>
	<b>Usage statistics</b>	<p>The CMS must allow comprehensive usage statistics to be gathered, including: most popular pages, daily usage, and search engine usage.</p> <p>This information allows the success of the site to be tracked, and any usability issues identified.</p>

	<b>Accessibility</b>	The CMS must conform to standards such as the W3C Web Accessibility Initiative (WAI).
	<b>Cross browser support</b>	The pages must be viewable in all major web browsers (Internet Explorer, Netscape, Opera, etc). Specify which browser versions are to be supported.
	<b>Speed</b>	Page size must be limited to ensure that load times are acceptable for users. Specify the typical user access methods (LAN, modem, cable, etc).
<b>Contract &amp; business</b>	<b>Training</b>	The vendor must list the training materials that exist for the CMS, and the training services that they can provide.
	<b>Documentation</b>	The CMS must be supported by adequate documentation: for users, administrators and developers.
	<b>Warranty</b>	The warranty period provided, once the software has been purchased.
	<b>Maintenance agreements</b>	The vendor must outline their preferred support arrangements, including service level agreements and upgrade processes.
	<b>Resources required</b>	The hardware, software and operating systems required by the CMS.
	<b>Skills required</b>	What skills and knowledge will be required within <b>your</b> organization to customize and maintain the CMS?
	<b>Cost</b>	Both the fixed costs for the CMS, and the per-user ("per-seat") costs. The latter is generally more significant for a large organization.
	<b>Scalability</b>	The load levels that the CMS supports, and the additional resources (hardware & software) required for increased usage.
	<b>IT constraints</b>	Specify any pre-existing hardware or software that the CMS must interface with, or run on. This includes specific operating systems, databases or webservers.
	<b>Reference sites</b>	The vendor must supply a number of sites where the software has been successfully implemented. These must match the characteristics of your organization.

## Content Management Tools

Well-known providers of commercial systems targeted at political and activist campaigns include:

- Convio
- Virtual Sprockets
- CommunityZero

The more mature Open Source content management systems include:

- Drupal
- PostNuke
- Plone/Zope
- Mambo Open Source

## Email and Mass Mobilization

Internet email has proven value for notifying people and galvanizing them to action. The campaign processes for internet mailing evolved directly from print direct mail and newsletters. The campaign builds a database of constituents, and creates messages that encourage audiences to act or contribute.

There are several important differences between email and print mail:

- Email can be sent at much lower cost than print mail, providing inexpensive access to small, single-issue political organizers, as well as large mainstream groups.
- Mailings can be finely targeted more cost-effectively than print mail
- The recipient can act immediately on the subject of the mail, “clicking through” to make a donation, send a letter, sign a petition, or fill out a survey

Email-based “flash campaigns” are popular because they allow people to do something effective from their desk, in minutes. And the medium has shown impressive success.

- MoveOn.org started as a group opposed to the impeachment of President Clinton. MoveOn organized about 500,000 people over the course of the impeachment debate. Since then, MoveOn has used its list to organize flash campaigns for other issues such as media consolidation.
- The campaign opposing the Communications Decency Act in the mid-1990s mobilized 60,000 citizens to take action at critical points in the process. The CDA was passed by Congress, and was later overturned in the courts. Congress let the Court ruling stay without further legislation, because activists opposing the CDA won in the court of public opinion.
- Organizers of protests to the US invasion of Iraq used mailing lists to organize mass protests – in London, 300,000 protesters gathered on one day’s notice.

Some of the most impressive results from “flash campaigning” have occurred with internet fundraising, largely using email and web.

- John McCain’s 2000 presidential campaign raised \$6.4 million on-line and recruited 142,000 volunteers during the primaries, the vast majority in the days and hours after his victory in New Hampshire.

- The Howard Dean campaign raised \$7.5 million from 59,000 Americans in the second quarter of 2003, more money than any other Democratic presidential candidate. Close to half of Dean's fundraising came via the Internet.

The success of internet fundraising promises to reverse a decades-long trend in campaign finance, that of increased dependence on contributions by wealthy donors. In the 2004 election the majority of Howard Dean's campaign funds came from donations of less than \$200. According to a USA Today op-ed on July 15, 1993, "Since the 1975 post-Watergate reforms, presidential campaigns have relied on a combination of public subsidies and high-end donors to fund their campaigns, with the proportion of large donations — \$750 or more — steadily increasing. In the 1976 primary, large donations provided 18% of Jimmy Carter's private funding and 24% of Gerald Ford's. In the 2000 primary, big donors gave a whopping 74% of George W. Bush's funding and 65% of Al Gore's."

The value of online action alerts and fundraising places importance on building lists of interested constituents. The consent of recipients is extremely important to maintaining their good will. In a survey conducted in October 2002 by The Institute for Politics, Democracy & the Internet at George Washington University Graduate School of political Management, 69% of expressed reluctance to give their email, and 89% were reluctant to give a credit card number or contribute money to an online campaign, because of concerns about spam, privacy, and security.

Organizations conducting many campaigns over time gain value from analytics features that enable campaign managers to calculate the results of campaigns, and to test and optimize tactics over time. The methods are similar to those used with print direct mail, the main difference being speed. Electronic systems generate results, and reward experimentation, in batches of dozens rather than thousands, and in hours rather than weeks.

Making a solicitation online costs only 20 cents compared with \$1 or more for each direct-mail or telephone solicitation, according to a McKinsey & Co. study published in May 2003. Still, only about 1% of total donations was raised online in 2002, though the Internet's share probably rose to 3% or 4% in 2003, the company says.

Suites including from vendors including Convio and Kintera help organizations maintain an online presence; manage online fundraising campaigns, and online mobilization campaigns.

For example, Consumers Union uses Convio to manage focused issue campaigns, each with its own "microsite" and action list: <http://www.stophospitalinfections.org> is a campaign to disclose hospital infection rates, and <http://www.escapecellhell.org> is a campaign to protest poor service by cellular phone carriers. The mailing lists inform interested citizens of actions they can take, and include polls and surveys to gauge and engage interest. The websites have background information, and the ability to write, fax, or call congress, administrative officials, and corporations. Consumers union uses the email/web campaigns in conjunction with more traditional print and telephone communication. Convio's tools help build the polls, surveys, content, and response tools, and analyze response rates to different messages and techniques.

Since political campaigns are short-lived, and advocacy organizations are short on budget and technical staff, these applications are typically hosted.

Capabilities include

- content management/publishing for website
- personalized, demographically targeted email messages
- action alert management – enable customers to customize and send letters and petitions by email, fax, or print mail.

- Campaign management, to plan and analyze campaign results, from clickthrough rates to donations
- Constituent relationship management application to track each interaction with constituents
- Constituent database to store information about contacts

Commercial tools and services include:

- Convio
- Kintera
- Democracy In Action
- GetActive
- Orchid for Change

There are also specialized polling tools, suitable for quick-response online and in-person electronic polling.

<p><b>Tools for Polls and Surveys.</b>  <b>Source: National Coalition for Dialogue and Deliberation</b></p> <p><a href="http://thataway.org/resources/practice/hightech/polling.html">http://thataway.org/resources/practice/hightech/polling.html</a></p>	
<p>Option Technologies  <a href="http://www.optiontechnologies.com">www.optiontechnologies.com</a></p>	<p>Polling tool for face-to-face or multi-site meetings; participants respond from PC or handheld computer</p>
<p>Sharpe Decisions  <a href="http://www.sharpedecisions.com">www.sharpedecisions.com</a></p>	<p>Collect opinions from groups using wireless keypad technology. Includes Risk Assessment, Focus Groups, Employee Surveys, Strategic and Project Planning, Multiple Choice, Rating Scale, Paired Ranking or Relationship Modeling voting</p>
<p>Site Gadgets  <a href="http://www.sitegadgets.com">www.sitegadgets.com</a></p>	<p>Offers free polls that facilitate Web-based surveys allowing organizations to gather and analyze feedback.</p>
<p>SurveyMonkey  <a href="http://www.surveymonkey.com">www.surveymonkey.com</a></p>	<p>Tools for designing online survey, collecting responses and analyzing the results. Both “basic” (free) and “professional” subscriptions available.</p>
<p>WebAnalysis  <a href="http://www.webanalysis.com/onlinepolls.asp">www.webanalysis.com/onlinepolls.asp</a></p>	<p>A free polling tool similar to PollGear but with a few more options.</p>

<p><b>WebSurveyor.com</b></p> <p><a href="http://www.websurveyor.com">www.websurveyor.com</a></p>	<p>Secure, do-it-yourself online surveys with ability to customize options and a unique survey-question library.</p>
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### Group-forming – Smartmobs and Meetup

Websites and alert lists use a traditional centrally controlled process, where small numbers of campaign organizers provide action alerts and fundraising requests to a large number of supporters. The real innovation in internet campaigning comes from new tools and techniques for supporters to find each other and to organize themselves.

These tools of self-organization often bridge electronic communication with physical-world organization.

The techniques of “smart mobs” – organizing ad hoc demonstrations with email and text messaging – have become common tools of political protests. The latest tools turbo-charge older “phone chain” techniques – the difference is that recipients can be reached anywhere, organizing extends to the street and the polling place, and communication spreads through informal social networks, as activists send messages to their friends, and During the protests against the WTO conference in Seattle in 1999, between 40,000 and 60,000 demonstrators from over 700 organizations used email and cellphones to mobilize protests against globalization.

**Comment [JL1]:** This is awkward. I suspect that something’s missing but I’m not sure what it is? Should activist be plural, activists?

- SMS text messaging, rare in the US, is phenomenally popular elsewhere in the world. In January 2001, protesters in the Philippines used text messaging to spontaneously organize protests that overthrew the government.
- In the 2003 and 2004 elections in Korea, supporters of opposition candidates swarmed on bulletin boards and SMS and mobile phone calls, on Election Day, to get out the vote and elect their candidate. In the 2004 election SK Telecom, the nation's largest wireless service provider reported that on the election-day it logged 350 million cell phone calls and 75 million text messages, a 25 % increase compared to a normal day, according to Jean K Min, reporting for Howard Rheingold’s Smart Mobs weblog.

These techniques are becoming part of the election process around the world. As reported by Howard Rheingold, “elections in Kenya and Ghana were kept honest by monitors who used a network of mobile phones and radio stations; India's ruling Bharatiya Janata Party uses SMS to maintain contact with the press and voters; in South Africa, SMS registration was part of the official voter registration process.”

Meetup.com provides a slower service providing online organizing tools for face to face meetings.

Meetup.com is a web-based service that lets groups organize face to face meetings that occur at the same date and time around the world. There are Meetups for Democrats and Republicans, knitters, single parents, and Mini Cooper owners. Participants can find and sign up for Meetups in their area, and be notified by email of upcoming events. Meetups help new groups organize themselves and develop a constituency, and enable more established groups to organize with no logistical effort.

The 2004 US Presidential campaign popularized the use of Meetup for political activism. The service played a key role in the insurgent candidacies of Howard Dean and Wesley Clark. Joe Trippi, Dean's campaign manager, said that "The largest component spreading the word - both in money and organization - are the Meetup folks." As of September 9, 2003, the Howard Dean Meetup group had 109,300 members, accounting for one sixth of Meetup's total membership.

The weakness of the 2003 version of Meetup is that it gave groups little control over where and when to meet, and how to communicate with each other. After a group has formed, it typically wants more control over its meetings and list. Meetup has begun to provide groups with more control – in spring 2004, the Meetup+ service provided the capability to send private messages to other members, to nominate venues to meet, to create agendas for meetings, and to create personal web pages.

Meetup-like techniques for organizing online and meeting in person are powerful ways for groups to organize. Techniques and tools for Meetups will be integrated into other campaign toolkits and custom-developed tools.

For example, The Wellstone Civic Dialog is a series of discussions that are co-ordinated online and take place in person. Participants sign up on a website (<http://www.wellstone.org>) to organize or attend an event or meeting. The initial Wellstone Dialogues were organized around a national reading of Paul Wellstone's book, *Conscience of a Liberal*. The program has expanded to support discussion topics of participants' choice, and to include both private and public meetings.

### **Forums, weblogs, and wikis**

Meetup and Smartmobs help groups assemble in the moment, but don't do much to help groups after they get together. Tools including forums, weblogs, and wikis help groups organize themselves and build a shared memory. Self-organization is a radical departure from traditional political campaigns. In the words of campaign consultant Nathan Wilcox, "This is the antithesis of the tightly controlled campaign communications model that has been the norm for at least 50 years."

### **Forums and mailing lists**

Forums and mailing lists are tools for conversation and collaboration. They are for conversation among the groups' members, rather than broadcast from campaign central. The forum model evolved from standalone bulletin board systems that pre-dated the internet. The more recent generations of forums were designed for the worldwide web.

Forums and mailing lists are similar. Forums are web-based, often with an email option. Mailing lists are email-based, often with a web archive, and a web-based interface to post, search archives, and administer the lists.

The forum model is an online community for discussion about a set of topics.

- Forums are used by advocacy groups for discussion and deliberation among constituents. For example, the ACLU offers online forums discussing campaign finance and voting rights issues. <http://forums.aclu.org/categories.cfm?catid=120&zb=8680141>
- During the Howard Dean campaign, "Dean Forums" were used to discuss policy. Dean supporters used the forums to post their comments, suggestions, volunteer reports, and policy ideas.
- E-democracy.org runs a lively set of forums on state and local issues in Minnesota, using the open source "Mailman" application, archived using the MailArchive service.

In order to be used effectively in political campaigns or in governance, forums need to be used in the context of a facilitated process. The process can be more or less formal, and more or less hierarchical, but should be present to ensure sustained focus and civility. One effective example is the use of online dialog by Dutch minister Roger Van Boxtel, responsible for minorities, inner cities and e-government. According to Elizabeth Richard, in a paper by the Canadian Policy Research Networks, “Van Boxtel has managed to develop a sustainable online relationship with citizens, building on the online tradition brought upon by the pioneering efforts of the Amsterdam free-net.”

These discussions are carefully planned and promoted. Sometimes they imply a public information initiative to ensure issues are properly understood. An online discussion with the public servants involved in the specific policy development issue follows. The discussion is open, but moderated by a representative of the independent Institute for Political Participation. This institute, while independent, is closely associated with the minister’s office. Weekly summaries are issued, as the discussion runs for one month. At the end of the month, citizens have direct access to the minister, through a one-hour live chat. This session is promoted in the previous morning paper. A climate of trust results from both the preparation and the close involvement of the minister. <http://www.comnet-it.org/egovernment/lessons-ntwkmdl.pdf>”

In the US, a variety of groups including *Web Lab*, *e-thePeople.org* and *Information Renaissance*, and *America* – are pioneering methods for using collaborative technology to help people engage in meaningful conversations about public issues.

<http://thataway.org/resources/practice/hightech/intro.html>

### **Evaluation criteria**

The forum format is useful for ongoing discussions, but it has notable limitations.

- It is volume-dependent. If a discussion is high-volume, participants who can’t keep up will leave. If discussion is too low-volume, participants won’t stay interested.
- Forums that are large and anonymous tend to attract misbehavior – viciously aggressive arguments (flamewars), and troublemakers who come to a discussion to start arguments (trolls). Moderation is needed to preserve healthy interaction.
- Forums are conversations, which by their nature tend to diverge and digress. Moderation and structure is needed in order to bring a group to agreement.
- Email and forums are good for distributing action alerts, but less-well suited for coordinating action. The group doesn’t have a picture of current status. Ideas and documents proliferate in multiple versions.

Consequently, mailing lists and forums are used most effectively in conjunction with other tools that are more effective at managing attention, building consensus, and coordinating action.

Web-based forums are effective in several settings:

- when the group itself is well-known – a popular candidate or activist organization -- and a website draws an ongoing stream of new and repeat visitors
- when the group is smaller and highly committed, willing to return to a website without active reminders

Mailing lists deliver messages to the recipients’ inbox, and are therefore effective for active organizing, delivering action alerts, and sharing news. Mailing lists are quite sensitive to volume – high-volume lists with hundreds of postings per day will discourage participants.

Technology selection depends, in part, on the skills and technical infrastructure of the group. The simplest and easiest path may be something like Yahoo groups, an easy-to-use advertising-supported service.

Groups with access to moderate technical skills and infrastructure – including the ability to install and maintain applications on a server – have numerous free open source tools to choose from. They should consider ease of installation and administration, as well as ease of navigation and attractiveness for end-users.

High-volume forums benefit from ratings and moderation features that allow users and moderators to filter out off-topic and hostile posts, and content management features that allow users to navigate current and older discussions by topic areas, and to create customized views for their own interest. At the high end, complex forum software overlaps with general-purpose content management software and general-purpose content management tools, often including discussion board modules. High-end forum software requires a similar high level of installation, configuration, and maintenance as general purpose content-management systems.

## Tools

Mailing lists	
<b>Yahoo Groups</b>  <b>www.yahoogroups.com</b>	Yahoo Groups is an extremely popular, free, advertising-supported service, with tens of thousands of political mailing lists. The service has an easy-to-use web-based interface for joining and administering lists, and includes online archives, along with other, lesser-used features such as a group calendar.
<b>Mailman</b>  <b>www.mailman.org</b>	Open source mailing list system, written in Python with web-based administration and archiving. Requires server root access to install.
<b>ezmlm</b>	Open source mailing list system, written in C. Depends on qmail mail transport. Web administration with qmailadmin.
<b>Majordomo</b>	Venerable open source mailing list, written in some language. Web-based administration with the addition of the MajorCool utility. Harder to manage than mailman.
<b>Listserv</b>  <b>www.lsoft.com</b>	Venerable proprietary mailing list, used by over 300,000 lists. Web-based administration and archive
<b>Forum software (<a href="http://www.topology.org/soft/mb.html">http://www.topology.org/soft/mb.html</a>)</b>	
<b>PHPBB</b>	phpBB open source (GPL) message board, in HP, using MySQL, PostgreSQL, MS-SQL, ACCESS databases. Flat forum structure.
<i><a href="#">Phorum</a></i>	Uses PHP and MySQL or PostgreSQL. <i><a href="#">OSNews.com</a></i> . Tree-structured forums and message threads within each forum. Here's their list of <i><a href="#">sites running Phorum</a></i> .
<b>daCode</b>	daCode. Slashdot-like BBS software which was once used for linuxfr.org. Uses PHP and MySQL or PostgreSQL. An example is this very nice <i><a href="#">French mutt site</a></i> . This <i><a href="#">French Gentoo site</a></i> also looks fairly good. See also their <i><a href="#">list of daCode sites</a></i> .

<a href="#"><u>Antiboard</u></a>	PHP /MySQL or PostgreSQL. Customizable, designed to easily integrate into any webpage. It is multithreaded and can support multiple message boards, and also shows nested comments."
<a href="#"><u>tForum</u></a>	PHP/MySQL forum that includes many features such as easy customization, unlimited boards and categories, IP banning, e-mail notification of replies, word filtering, message preview, searching, user profiles, private messaging, polls, and much more." Made In Germany.
<b>Slash</b>	Perl/MySQL based forum software written for the popular SlashDot technology community site. Content management and forum features, with user rating sytem. <a href="#"><u>list of slashcode-using sites</u></a>

## Weblogs

Weblogs (also called *blogs*) are easy-to-use personal publishing tools that have been adopted recently for use by activist and political campaigns. Weblog tools make posting to a website as easy as writing an email. Unlike content management systems designed for a formal editing and publishing process, requiring rounds of editing and approval, blog posting is immediate.

And unlike full-featured content management systems, which support the creation of websites with complex structures, weblogs use a simple, time-based format – the most recent posting is at the top of the page.

Weblogs have features that make them a conversational form, in a different style than web forums. Weblog systems often have comments that let readers talk back and talk to each other. And it is common for weblog entries to link to news items, or entries by other bloggers. Search services, including Google and Technorati, can make it easy to find others talking about your issue or candidate.

This simple, social form became popular among millions of individuals posting about their personal lives, interests, and careers. When they're used for a campaign, weblogs are typically written in a more personal and informal voice than formal journalism and campaign literature. They make it easy for campaigners and activists to post quickly and often – it's ideal for up-to-the minute news, fundraising results, updates from the campaign trail.

Their simplicity make weblogs suitable primary publishing tools for small campaigns. With minimal training, non-technical users can easily post news items, The campaign can keep a site current with minimal technical burden. Items that change less frequently can be maintained as standard html or static web pages.

The immediacy, informality, and community make weblogs an effective medium for getting the word out to supporters, and, in larger campaigns, building community among supporters.. The first use of a weblog in a political campaign was by Tara Sue Grubb, a little known candidate who helped raised awareness of her candidacy by blogging. But it was the Howard Dean presidential campaign that brought campaign blogging to international prominence. The Dean campaign, having captured the interests of bloggers in early 2003, started its own weblog in June of that year. The candidate himself didn't post messages, but his campaign staffers posted about the day-to-day progress of the campaign, and quickly developed an active following.

By September, 2003, the Dean blog was getting 30,000 visits and thousands of comments per day. The blog community's enthusiasm helped to drive grass-roots fundraising. The community quickly developed a mechanism for dealing with "trolls" – people who posted inflammatory comments.

The Dean blogging community included blogforamerica.com, where the posts were written by campaign staff, as well as blogs by individual weblog supporters for Dean, including DailyKos, One Father for Dean, and several others.

While campaign blogging is best known from the Dean example, blogs can be particularly helpful for small activist groups and local campaigns. Smaller groups can use a weblog to post announcements and action alerts without delay and without technical intervention by a webmaster. For example, Environment Colorado uses a weblog to post news about environmental legislation and policy in Colorado.

Politically active citizens use weblogs to communicate about local political issues. For example, OrangePolitics.org is a group weblog about political issues in Orange County, North Carolina. It deals with nuts and bolts local issues – construction of new student housing, a local proposal for red-light cameras, and county commissioner elections.

### **Evaluation Criteria**

A key strength of blogging is its simplicity. Smaller groups, especially, should look for blog tools that can be used and managed by the activist team.

At a larger scale, full-featured content management systems are starting to have built-in weblog features. If a campaign is using such a CMS, it may make sense to use the native weblog capabilities – but double-check ease of use, and the presence of required features.

Handy features to look for in weblog systems include:

- comments (and the ability to turn comments off)
- support for the RSS and ATOM syndication standards
- integration with email, for posting and subscription
- easy support for multiple authors
- support for password protection, for sharing private information

It is very useful when a campaign can simultaneously post action alerts to a weblog and a mailing list. Today, it takes attentive setup to do this using the leading weblog tools. We expect it to become a standard campaign feature.

### **Weblog Tools**

Smaller groups can use tools designed for personal blogging including:

- Blogger
- TypePad (a for-pay hosted service) and Movable Type (free software for installation)
- Radio Userland
- BlogHarbor
- Blogware

In addition, full-featured content management systems such as Drupal and PostNuke are starting to include blogging features, along with a broad range of capabilities for managing content in a

general-purpose website. Setting up a full content management system is a more elaborate and time-consuming task than starting a weblog; see the website section for details.

## Wiki

Blogs are the easiest way for campaigns to publish on the web. Wiki is the easiest way for campaign activists to collaborate. A wiki is a website where anyone can edit any page. The version history of each page is saved, so if someone makes a mistake, or vandalizes a page, the damage is easily and quickly undone.

Wikis were invented in 1995 by Ward Cunningham to support the efforts of “extreme programming” – a highly collaborative style of software development requiring very fast-turnaround, rapid-co-ordination, and fast decisions. The word wiki comes from a Hawaiian word meaning “quick.”

The immediacy and collaborative nature of wikis make them very useful for campaign functions requiring rapid collaboration under time pressure. The wiki form is also useful for building consensus. Unlike a mailing list or discussion forum, where each post responds to and contrasts with the next, the wiki form encourages participants to literally “get on the same page.” Wikis can be used for the development of documents such as policy and procedures, grant proposals, reports, with each contributor working in their own time on the single live document.

The classic form of the wiki is entirely open to public view and editing. This form is surprisingly resilient. Wikipedia, a web-based encyclopedia with over 200,000 entries has high-quality entries produced by an army of volunteers. The community feels ownership for the content and protects it from damage.

Wikis are used effectively in collaborative civic projects such as Seattle Wireless and Austin Wireless (<http://www.austinwireless.net>), community portals for the deployment of wireless technology throughout the cities. The home page of the wiki keeps the community updated on what’s new, individual contributors can maintain pages on their own sections of the project, and technical teams can continuously improve answers to frequently asked questions (FAQs)

There are a number of examples of wikis used for campaign and activist purposes:

- The Green Party of Canada is building its party platform using a wiki, giving citizens say in the development of policy and mission: <http://www.greenparty.ca/memberzone/tiki-index.php>
- CivicAction, a wiki-based guide to the organization and execution of campaigns, site put together by Kucinich activists, <http://www.civicactions.org/cgi-bin/wiki.pl>
- Lobbywatch is German site with a public listing of the lobbyists affecting the development of German and the European policy on issues such as health care. <http://www.lobbywatch.de/wiki/wiki.phtml?title=Gesundheitsreformen>

A healthy public wiki harnesses community contributions, and is more flexible than a structured content management system.

Wikis can also be used with password protection, so that only members of the campaign team can see and change the pages. This makes wikis useful, lightweight tools for collaboration within a core group of campaign activists. Today, most groups rely heavily on internal email for rapid, ad hoc collaboration. Jonah Seiger describes process used to manage the CDA campaign: “We organized that entire case using internal email lists, exchanging documents, planning meetings, honing arguments, querying people for press, for specific technical or legal assistance.”

However the trouble with using email in this manner is that important items get lost within inboxes, multiple versions of documents circulate, and there is no single view of status. Wikis can be used internally to bring a team literally onto the same page, to share current versions of documents, and to build a knowledge base of training material, without drowning campaign staff in email.

As this chapter was being written, the John Kerry field organizing team was using a private wiki to co-ordinate volunteer organizing in swing states. Participants kept lists of contacts and mailing lists, co-ordinated speaking and letter-writing campaigns, and were building an ongoing library of volunteer training material.

The Howard Dean campaign also used a wiki for decentralized news gathering and analysis. Every morning, between 5am and 9am, a team of 400 activists scanned news around the country and clipped news items. Each page included full text entries, a link to the source, and annotation. A small team of editors then created Issue pages that linked to the relevant clips, organized by issue.

At 9am, the campaign team would gather to plan their approach to the news of the day. This approach enabled the Dean team to:

- respond rapidly to the day's breaking news
- build a searchable library of clippings as a by-product of the day's clipping efforts
- effectively co-ordinate a nationwide network of committed volunteers

### **Evaluation Criteria**

The value of wiki is the ability for activists and campaign staff to collaborate quickly and simply. However activists should be wary of wiki packages that have so many features and functions that become difficult to use.

As with other tools, consider the technical skill and time constraints of the team before deploying a wiki. For groups seeking rapid productivity, or groups without significant technical staff, hosted services can enable a team to get up and running quickly.

Features to look for include

- Notification of changes through email and RSS (so participants can get updates without continually checking the website)
- Ability to upload documents and images
- Password-protection, if you're looking to use the wiki in private mode
- Backup capability
- GUI editing, for ease of use

There are a variety of open source tools for teams with the skills and time to install and configure software.

- Umod, the first wiki. Simple to use, and with powerful features for connecting to other public wikis
- MoinMoin, a Python-based wiki
- OpenWiki, a Microsoft ASP-based wiki
- Tiki, a PHP-based content management system with a wiki core
- Twiki, with a lot of collaboration feature

There are also hosted services:

- [Seedwiki](#), a free hosted wiki service (what are their terms of use).
- [Editme](#), a simple hosted wiki service with GUI editing
- [Socialtext](#), a hosted wiki services with easy ability to manage multiple, private wikis and weblogs

## Syndication

Weblogs and wikis are great ways for campaign teams to share information and keep current on moment-by-moment campaign activities. For a busy activist keeping up with constantly-changing events in a large campaign, multiple campaigns, it becomes a chore to keep up with multiple websites.

RSS (Really Simple Syndication), the leading format for web content syndication, lets activists easily keep up with changing news at multiple sites. The website needs to publish its content in RSS format, which is a standard machine-readable XML format. Then, the activist subscribes to RSS feeds using a tool called an RSS reader or aggregator. News items automatically appear in the reader when they are updated, and disappear after they are read. The activist only receives updates to the sites she subscribed to – there is no chance of SPAM.

RSS has not yet been widely adopted as campaign technology, but it is likely to become common soon, since it is useful and easy. RSS is very popular among the weblog reading and publishing community, since there are so many blogs to keep up with. Major news publishers support RSS, including the New York Times, the BBC, and Yahoo News. Government agencies have started to publish updates in RSS format. As this article was being written, the US Senate and the State of Utah have started to publish RSS feeds; we expect this to become a ubiquitous way for governments to publish news, and for active citizens to keep up.

RSS newsfeeds can also be used to connect a network of related groups. Websites are able to aggregate news stories that are posted by related sites. For example, according to Jon Lebkowsky, the Deanspace project intended to enable the Deanspace sites to share posts and feeds. At each site, an editor would be able to select from a menu of Dean-related stories around the web, and choose to publish specific posts.

## RSS Tools

It is very easy to generate RSS feeds. Most weblog tools, some content management systems, and some wikis have this ability. There is also a newer syndication format, called ATOM, that some tools are beginning to support. The distinction is not very important for campaigns or activists. Make sure that your publishing tool supports RSS, and set it up to do so. Also include an ATOM feed if your tool supports it.

There are different versions of the RSS standard, which makes publishing a bit inconvenient. To make sure that your RSS feed can be read in most readers, test the feed in validation services, including

- [www.feedvalidator.org](http://www.feedvalidator.org)
- <http://aggregator.userland.com/validator>

There are a number of good, free or inexpensive RSS readers available, including:

- Web-based: Bloglines -- free -- *use for public workspaces only*
- Windows-based: FeedDemon -- trial available, \$30 price
- Windows-based: SharpReader -- free
- Microsoft Outlook-based: NewsGator -- 14 day trial, \$30 price
- Mac-based: NetNewsWire -- 30 day trial, \$40 price

## Tools for Mass Listening: Google, Technorati, Daypop, Blogdex

Weblogs, wikis, and forums are great tools for activists to self-organize, allowing campaigns to benefit from the education and activism of citizens. In the words of campaign professional Nathan Wilcox, “Any candidate running in 2004 must seriously reconsider the usual messaging tactics and strategies — while polling and focus groups serve a purpose, it might be more valuable to attend a political meetup gathering or spend some time on political blogs and chat rooms looking for issues that get people engaged and speak to those concerns:

With so many more citizens talking, it is important for campaigns, and for elected and administrative officials, to use tools for “mass listening”, to use the phrase of Elisabeth Richard of Canadian Policy Research Networks.

One of the challenges faced by the Dean campaign was listening to the voices of the thousands of citizens active in the blogs and forums. When Joe Trippi was asked at the 2004 O’Reilly Emerging Technology conference how the campaign considered the input of the online Deaniacs, he didn’t mention ideas or policy proposals. He talked about the big red bat that was used to measure campaign contributions.

There is a new range of tools emerging on the public internet that provide a snapshot of public interest.

- Technorati is a weblog search engine that reveals which weblogs link to a given blog. An campaign site can use Technorati to find who’s linking to it, to help identify supporters and opponents
- Daypop and Blogdex show the top news articles mentioned in weblogs. These tools give a quick check of the “zeitgeist”, showing what masses of bloggers think about the news of the day.
- Feedster is an RSS search engine that also puts together aggregate feeds based on topics. Users can click a single checkbox to subscribe to news about George Bush, John Kerry, or some other politician or campaign of interest.

These tools will be used by activists and campaigners to surface hot topics, and integrate them into the campaign.

Mass listening tools can provide a richer perspective than polling, which captures answers to loaded, pre-defined questions. And mass listening tools can provide access to a broader range of voices than the traditional media.

Sunir Shah, graduate student at the University of Toronto and a leading thinker about the role of the internet in collaborative discourse, comments in Meatball Wiki on the political media in Canada. “Passive observation of the political thinking of the country has always been central to crafting policy. Politicians have been reading newspapers and magazines since before confederation. However, this material represents only a very small percentage of the population, biased heavily by economic or other political aims. At any rate, it does not represent the “average citizen’s opinions.” <http://www.usemod.com/cgi-bin/mb.pl?PoliticalAction> Citizens who participate in online political forums are a subset of the electorate as a whole, but a wider section of the citizenry than those writing or quoted in the political press.

## Social Networks and Directories

In the last year, there has been an explosion of social networking services. These services provide directories of user profiles, and enable them to surf the social networks of their friends and contacts.

Tools in this category include:

- LivingDirectory
- LinkedIn
- Friendster
- Tribe
- Orkut

These services allow members to find and join groups, to participate in discussion forms; to view profiles of members and members' associates, and to post events.

LivingDirectory is intended specifically as a shared directory of progressive groups and members. Other networking services don't have a stated political affiliation.

Friendster is oriented more toward dating and personal connection, while LinkedIn focuses on business connections.

For now, campaigns and activists can look to these networks as venues for finding volunteers and supporters. Because the barrier to entry is low, the level of commitment is also low. And these services provide sparse tools to help volunteers get more involved. Over time, we expect to see more specialized networking services develop for political purposes, with tools to support in-person meetings, action alerts, and other tools. Over time, we expect to see social networking features develop within the community systems used in campaigns. For example, the Dean Campaign had developed a rudimentary directory of Dean supporters.

As social networks proliferate, we expect to see activity in standards that enable the interchange of profile data among networking services, and in privacy protocols that govern the interchange of that data.

### **Social Network Analysis**

As Valdis Krebs describes, political opinions and voting behavior are heavily influenced by a citizen's social network. Social network analysis tools and techniques have been pioneered in academic research and within large corporations, but have not been widely used in campaigns, according to sociologist Jonas Luster.

The traditional techniques of social network analysis used field interviewing and observation to identify the relationships in social groups, and analytical techniques to map and analyze those relationships. Now that more and more social connections occur online, there are vast and growing sets of data tracing the relationships between people. Some of these relationships are traced explicitly, in social networking services such as Friendster. And many more are traced implicitly, in the patterns of response, linking and commentary in online forums, weblogs and wikis.

These analytical tools will provide campaign organizers with the ability to understand how their issue or candidacy is being interpreted and spread within social networks, in close to real time. And they will provide citizens with greater ability to find and organize with like-minded people.

### **Get Out the Vote**

As described in the chapter on email targeting, activists and developers are refining applications for targeted marketing, and managing the process of fundraising among wealthy donors

A new take on this model is coming from groups that have a more bottom-up orientation, giving tools to campaigns to help citizens organize each other. These developments are in early stages: several of the applications below were under development at the time of writing.

Advokit ([www.voter2voter.org](http://www.voter2voter.org)) is based on friend-to-friend campaigning. This works, says founder Dan Robinson, because it leverages and re-enforces existing personal relationships. Based on experience in New England organizing around local property tax over-ride campaigns, founder Pat Dunlavey discovered that “When compared to a similar campaign utilizing volunteers to call their neighbors, results achieved using friend-to-friend campaigning were quite impressive, with contact rates of 84% vs 45%; and ID rates of 57% vs 31%. Compared to contacts from rank-strangers with no geographic or social affinity, the friend-to-friend method performs five to ten times better in identifying supporters. “

Advokit is a packaged application for campaigns to support friend-to-friend get out the vote efforts, with features to support phone banking, walk lists for neighborhood visits, ride lists to rallies, and volunteer-matching. Still in development, the application will include traditional geographic and demographic targeting, and friend to friend methodologies, where a campaign volunteer identifies voters to recruit.

Indyvoter is an initiative planning using online grassroots organizing to mobilize young, progressive voters. The online application (on the drawing board at the time of this writing) enables young voters to:

- Search online voter guide for local elections
- connect with others in the region, with online directories and physical address book
- organize brunches and book clubs
- neighborhood voter registration and education
- organize get out the vote drives

CivicSpace ([devel.deanspace.org](http://devel.deanspace.org) at the time of this writing) is developing website applications for civic groups, based on the work pioneered at Hack4Dean, which became DeanSpace. CivicSpace enables grass roots groups to have their own sophisticated websites. Based on the Drupal open source CMS, it provides a “content management system in a box”, including the features needed for campaign groups to organize themselves.

- install and configure, and customize the site
- set up weblogs, syndication, and aggregation
- threaded discussion groups, polls and surveys
- voter contact management

**Votewatch** <http://www.votewatch.us/> is another, more specialized activist application. Launched during the 2002 mid-term election, The Votewatch system focuses on monitoring elections. Volunteers use handheld computers to track (what do they track) in on the day of election, and dispatch investigators to trouble spots. Statistical analysts analyze reports with an eye for anomalies related to voting equipment and voting districts.

The application uses RSS to syndicate election-day reports to the media and concerned citizens and organizations.

- Hosted services with social networking, and meetup, giving citizens tools to organize their friends:
- Citizens Vote is a social networking application that encourages citizens ask to ask their friends to vote democratic
- Mainstream Moms against Bush (<http://www.themmob.com/>) provides tools for moms (and other voters) to organize meetups, host voter-writing parties for their friends. The site provides tools to print letters, flyers, postcards, tshirts, and other propaganda.
- PartyForAmerica is an online service giving voters tools to find, host, and organize house parties for progressive causes <http://dev.partyforamerica.com/home.html>

- National Voice is a *coalition* of non-profit and community groups working to maximize public participation in our nation's democratic process. They have an online database to match volunteers and funding sources with non-profits doing voter education and registration.
- There are several early efforts to develop open source versions, including Advokit, from Pat Dunlavey, and Campaign in a Box, a project with Zephyr Teachout of the Dean Campaign.

## Privacy and security

A comprehensive treatment of privacy and security is beyond the scope of this chapter. However, there are a number of security considerations that campaigners should keep in mind when evaluating online methods and tools.

**Basic computer security.** Any network-connected computer is vulnerable to attack by random hackers. Campaigns are competitive by nature, and are vulnerable to disruption by unethical opponents. Campaigns need to deploy skilled staff to ensure that servers are protected by keeping critical software components current with security updates, using firewalls, intrusion detection, and other standard security techniques. If the campaign does not have staff to maintain the security of sensitive communication and data, reputable hosted services can be an effective solution. See *Web Security, Privacy, and Commerce*, 2<sup>nd</sup> Edition (O'Reilly, 2002), by Simson Garfinkel for an advanced beginner treatment of the topic.

Comment [JL2]: Name of book?

**Private communication.** Campaigns need to balance open communication to build support, with private communication to avoid sharing tactics with competitors. Campaigns can take advantage of collaboration tools with access control, providing access to a core team, and restricting access to others.

**Protecting constituent data.** A 2003 report by Jonah Seiger of the Institute for Politics Democracy and the Internet reports that vast majority of respondents indicated that they have hesitated to provide their e-mail address (69%) and credit card number (89%) to political Web sites, citing concerns about SPAM (unsolicited email), privacy, and security. The report's suggestions include:

- Post a privacy statement
- Use standard security technologies such as SSL
- Offer visitors choice over how their data will be used
- Demonstrate a commitment that the campaign will stick to its privacy and security policies.

**Encrypted communication.** Encryption can be a valuable tool for activists who are working on repressive states, or who are working on behalf of people whose safety is at risk, such as victims of domestic abuse. For example, Human rights workers increasingly use the Internet to coordinate their actions against repressive governments. Human rights activists in Guatemala, for example, credited their use of Pretty Good Privacy (PGP) with saving the lives of witnesses to military abuses.<sup>49</sup> Encryption is not the ultimate solution, however, as governments can outlaw its use and arrest those who do not comply.

## Evaluating tools

Each section has included tips for evaluating each category of tools. The following table, taken from an article about evaluating open source tools, is a useful summary overall.

- Does the tool do what I need 'out-of-the-box', or will it need to be customized?

- Is the user interface simple for the people who will be working with the application?
- Is there reasonable documentation and support? Does the support forum handle newbie questions well?
- Does the tool use technologies and languages we are already familiar with?
- Is there an on-line demo my users can play around with to see if the tool 'feels right' to them?
- Is the tool's programming team actively developing and maintaining the tool?
- Is the tool one of the more popular ones in its category?

### Patterns of use

This chapter has covered a plethora of tools that are useful for campaign activists using the network. Clearly, there is no single tool that addresses all of the requirements of an election or activist campaign. And there's no reason there should be. Before computers, campaign tools include postal mail, telephone, buses, trains, and walking through neighborhoods, ringing doorbells.

As the tools and methods for networked campaigning become more familiar, we are starting to see patterns for using the tools together. One such set of patterns was used in campaign by digital rights activists against the so-called "Super DMCA." This was a bill, sponsored by the Motion Picture Association of America in numerous states, the purpose of which was ostensibly to reduce theft of services and content. However a literal interpretation of the bill would impose broad control over personal and business use of the internet. In previous years, the bill had passed quietly in seven states. In 2003, technology activists took notice.

In April, notice of a hearing on the bill was posted in Slashdot, a popular technology news site and group weblog. A number of Tennessee techies read the posting, and noticed each others' remarks in the Slashdot comments section. With just a few days notice, they organized 23 people to attend the hearing, and co-ordinated testimony against the bill. During the legislative session, the Tennessee Digital Freedom Network (<http://tndf.net/>) posted news and alerts on a website, and co-ordinated activity using an email network.

Activists fighting the bill in Tennessee, Massachusetts, Michigan, South Carolina, Georgia, Texas, and Florida, along with representatives of national technology policy groups used the internet to co-ordinate. The activists set up a mailing list to co-ordinate opposition across the states, and held regular conference calls, supported by online chat.

State-based groups sent email action alerts with links to the action alert systems from national EFF and Public Knowledge, and in response activists sent letters and faxes to their local legislators.

The activist groups used combinations of electronic and traditional methods.

- In Texas, the activist group used a weblog and mailing list to post alerts to members
- A private wiki was used to draft and store fact sheets, which were delivered by fax and in personal visits to legislators' offices
- Personal relationships were used to reach out to high-tech manufacturers whose consumer electronics businesses would be harmed by the bill
- A mailing list call for volunteers was used to organize a team of 8 volunteers, visited each of the 150 members of the Texas House of Representatives on Memorial Day weekend

With coordinated opposition, the bill was defeated in six states in 2003.

Diagram of tools for different purposes.

## Trends

In recent years, activists have been experimenting and pioneering techniques for using network tools in activist campaigns. Out of the details of these efforts, we can see and predict a number of trends and themes.

- **Presence.** Over time, we'll see richer tools for immediate communication and more sophisticated use of these tools. More campaign processes will involve co-ordination among people who are mobile and always-connected, facilitating rapid response at the high speed of an active campaign.
- **Integration.** Today's disconnected software tools will be integrated into suites, and pluggable at interface points.
- **Aggregation.** Activist groups will be able to aggregate content and bring together activist networks to combine forces on larger goals. Online tools will support traditional processes of coalition building.
- **Connection to traditional campaign process.** One of the challenges in the early days of networked campaigning has been a gap between the technical savvy of toolmakers and the process savvy of traditional activists. This gap will be bridged, resulting in effective processes for using network tools in effective campaigns.
- **Mass listening.** Activists need to adapt their traditional campaign processes to campaign effectively using networks. Over time, we'll see better tools and techniques for mass listening – identifying ideas and themes in the net-discussion, and using deliberative processes to inform decisions. These techniques for mass listening are a technically augmented version of a skill that talented organizers have had for years – the ability to listen to people, and synthesize a common approach.
- **Connect to the physical world.** The Canadian paper on “Lessons from the Network Model for Online Engagement of Citizens” has an important caution for networked organizers: *Don't mistake email for organizing.* An action alert is not an organization. If you want to build a lasting political movement, at some point you'll have to gather people together. The Internet is a useful tool for organizing, but it's just one tool and one medium among many that you will need, and you should evaluate it largely in terms of its contribution to larger organizing goals. Do the people you reach through Internet alerts move up into more active positions in your movement? Do you draw them into conferences, talk to them by phone, meet them in person, become accountable to them to provide specific information and answer questions? If not, why do you keep reaching out to them?
- **Bottom-up campaigning.** The overall theme of this book is bottom-up campaigning. Every new generation of technology changes culture, and is assimilated into culture. The new style of networked campaigning will be assimilated into traditional campaign processes. Activists won't think about “e-campaigning” as a separate subject – they'll think about campaigning, communicating online and in person. At the same time, the properties of the network will transform campaigning. The internet's ability to enable many to many communication will break the stranglehold of the mass media, and create a return to an older world of grassroots campaigning.