

# Moving from Online Activity to Real-World Action

## INSIGHTS AND TIPS FROM ECHODITTO

Millions of people turn to the internet every day to find and organize local events, meetings, parties, and fundraisers. Evite.com boasts 250,000 new events organized online each month, and 1.8 million members of Meetup.com are organizing and participating in events for more than 9,000 local groups. This guide outlines the ways in which campaigns and organizations can harness this energy with a little bit of planning, staff support, and organizational buy-in.

### I. DEFINE YOUR PROGRAM

What type of program will best meet your organizational goals? Ask yourself and your organization how inviting your online community to take real-world action would help further your goals. Your volunteers will only want to participate in a program that clearly contributes to the goals that originally inspired them to join your effort.

Will your program be designed to organize volunteers to take real-world action, raise money, or all of the above? Earned media opportunities are available to you regardless of the type of program you choose. Here are some examples of each:

#### Volunteer program

- National day of action, protest
- Local field organizing, tabling
- Viewing parties for a major televised event, special broadcast, or film
- Meetings to provide organizational updates, make local chapter decisions
- Social gatherings that build local connections between your members

#### Fundraising program

- House-party fundraisers (pot-luck, drinks, etc.)
- Local event fundraiser
- Sponsored race, walk, fun-run, bike-ride, etc

#### Hybrid

There's a connection between engaged volunteers and fundraising success, so it's logical to incorporate fundraising into a volunteer program.

Unless you are planning a single day of action that is also designed to raise money, focus first on building a solid volunteer base, then encourage your groups and local leaders to incorporate fundraising by providing the appropriate tools and direction.

#### PROGRAMS IN ACTION

- Feb '03 – March '04 :: 189,000 supporters and more than 2,000 grassroots leaders signed up and participated in monthly **Dean "Meetup" events** in 1,200 towns and cities worldwide
- **Walk the World**, June 2005 :: More than 200,000 people joined hundreds of volunteer-organized walks in 96 countries and all 24 time zones to raise money and awareness about child hunger. In 2006, the UN World Food Programme will integrate a fundraising component.
- August 2005 :: **MoveOn.org PAC** and its partners organized hundreds of thousands to attend 1,627 self-organized Candlelight Vigils in all 50 states and D.C. to Support Cindy Sheehan

Once your goals are clear, take some time to outline a broad vision for the program. While the details of each event should be left to the local organizers who will be responsible for carrying them out, you can set the program's boundaries. Here are some initial questions to consider:

- **Frequency** :: Will you ask volunteers to sponsor recurring events (every month, week, etc.) or just one, single event? Or can anyone set up events whenever they want? Recurring events help to build a local group infrastructure and can be critical in building toward a crescendo event like an election, but they also require long-term staff who can support local leaders, answer questions, and provide information and guidance before, during, and after each event. Single, “one-off” events or fundraisers may require as much local planning and work, but they can also attract participants and volunteers more easily and stem burn-out.
- **Timing** :: Will the events happen at the same time (ie. 7 pm local time) and/or on the same day, or can the events take place on any day or time? Coordinating events so that they all take place on the same day or even at the same time can make a powerful statement and encourage additional participation. Also, it's worthwhile to consider if a certain time will work best for the majority of your members.
- **Location** :: Will you require or recommend that events take place in public places or private homes? There are benefits to both, which you can communicate to your volunteers, but we recommend leaving the final decision in the hands of your local organizers.
  - **Private homes** allow for more control over the physical environment and can be more appropriate for viewing parties or fundraisers. The downside is they can also be alienating and off-putting for newcomers and less accessible to public transportation.
  - **Public spaces**—like bars, coffee shops, restaurants, libraries, or event halls—are generally safer territory for new members who will appreciate the freedom of being able slip in or out of the event. Public spaces can more difficult to reserve, and organizers lose control over the physical environment like noise, parking, and audio/video equipment.

## II. CHOOSE YOUR TOOLS AND TECHNOLOGY

The technology that you encourage your members and supporters to use in creating, managing, and joining events plays a key role in the ultimate success of your program. Take the time to make an informed decision by speaking with others who have managed similar programs to yours.

There are a variety of online tools that allow you to post events and track RSVP's. They vary in their ability to let administrators moderate events and in how much data they allow to be displayed publicly (or with administrators) about event attendees, etc.

For some, administrators can control and moderate almost every aspect of the events. With others, you will have to depend on your volunteers for quality control and for reporting back pertinent data.

The following chart distinguishes some of the currently available tools by their key factors. Tool sets and available technology are constantly evolving, so this list is not all-inclusive. Use this chart as a guide, and take time to fully evaluate any web-tool in which you invest.

Tool	Summary	+ PROS +	- CONS -
Essembly.com Evite.com Meetup.com Upcoming.org	These are “hosted” organizing tools, which means your members will visit a separate website from yours to organize and sign up for their events. Some are not necessarily designed for membership-based event organizing, but they can easily be used for that purpose.	These tools are free and easy for first-time organizers to use. They require no technical expertise to set up, and anyone can start an event. (Note: There is a small fee to start a Meetup group, but you can provide leaders with coupons to waive this fee.)	With these third-party tools, you relinquish some level of control over your events. It can be difficult or impossible for a central administrator to collect or view RSVP data. It’s also challenging to visually modify these tools to “brand” them with your organization.
Democracy in Action Drupal.org Party2Win	These systems allow you to create and customize your own event-management tool and integrate the event tool with your website and database. (Party2Win offers similar customization options but remains separate from your website.)	These tools give administrators a great deal of control over how events are set up, what information is collected, and how the tool is branded. You control the data, except with Party2Win.	Drupal is free, but requires some technical expertise to set up and maintain. Democracy in Action is less technically challenging, but it is a paid service.
Blue State Digital Convio Kintera	These technology firms sell higher-priced suites of tools. You pay these companies to work with you to install the system on your organization’s website.	These advanced toolsets give event administrators a full menu of options that can be administered by non-technical staff. These tools are generally integrated into your website and a CRM system allowing you to track participation.	Many of these tools can only be purchased when “bundled” with an entire website package. All tend to be fairly expensive. If the tool is not precisely what you want, making changes can also be prohibitively expensive.

NOTE: New tools emerge regularly, so you may come across a tool that is not listed in the chart above. The tools listed here are those with which we have the greatest familiarity. Use this matrix to ask questions about and evaluate other tools.

### Custom Development

Some organizations, including Democracy for America, JohnKerry.com, MoveOn.org, and the U.N. World Food Programme, have built custom suites of tools that more specifically meet their

needs. This route requires a small team of developers (or coders) and a project manager who can very clearly specify the organization's requirements and manage the technical development and testing of the web-tools prior to launch. A custom suite of tools should also be integrated into an existing website and will likely require ongoing maintenance and tweaks over time.

### Supplementary tools

In addition to the tools that enable you and your grassroots leaders to organize and manage events, you may want to take advantage of additional tools that can help you and your leaders stay connected and informed.

- **FreeConferenceCall.com** :: Easily setup conference calls for your grassroots leaders; useful for providing last minute updates prior to the event day, reinforcing key items related to the day of action, enabling collaboration between leaders in different locations, and for training new leaders
- **Yahoo, Google Groups** :: Set-up an email listserv for your grassroots leaders to enable self-organized collaboration, and so that you can listen and respond to feedback and ideas being discussed.
- **SurveyMonkey.com** (inexpensive), **PHPSurveyor** (requires technical skill) :: If your event tool does not already have a built-in feedback or polling system, use these tools to collect feedback from both your grassroots leaders and also from any known participants. If you request feedback from both your leaders and the participants, ensure that your participant survey is shorter and easier to complete than the leader survey.

## III. APPLY THE TACTICS

Your implementation plan and organizing skills are equally as important as your technology to the success of your program. Your volunteer organizers and grassroots leaders are the heart and soul of your program, and so the tactics you employ to grow, sustain, and lead these supporters is critical to your success. After all, you and your staff cannot possibly attend each and every event yourself to ensure their effectiveness.

### Grow and recruit your base of grassroots leaders

In most cases, you will constantly be working to recruit additional leaders to grow the size of your program or to simply meet your goals. The best place to start looking for potential organizers is from within your known universe of supporters:

1. *Build a list of your campaign or organization's most active supporters.* You can define "most active" by whatever variables or data points are available to you, but you are looking for people who have consistently gone the "extra mile". Depending on the size and experience of your campaign or organization, "most active" can be defined by a wide range of variables, from a group of people responded to an email to those people who attended an event or contributed money.

Don't forget to include friends and family and personal contacts of fellow staffers or the candidate/leadership.

2. *Sort this list by geography* (state, county, district, etc.) or by whatever criteria you are using to recruit more hosts. This will help you prioritize your outreach efforts by focusing on the areas where you most need volunteer organizers.
3. *Send casual, individual, and compelling email messages* to the members of each geographic group, explaining the importance of establishing a campaign or organizational presence in that area to meet the goals that your members share with the organization. The purpose of this message is to simply gauge interest and solicit a reply, so be careful not to overwhelm your recipients with too much information. Convey energy and enthusiasm! If you do not receive enough responses to your email, consider calling through the list of supporters.
4. *Follow up by phone* with those who replied to your initial recruiting email. Remind them of how much support and guidance you will be providing them along the way and how they will part of a regional/state-wide/national/international network of local, volunteer organizers at the forefront of this program.
5. *Encourage local groups to incorporate recruiting into their agendas.* At the end of each house party, meetup, or event, encourage your hosts to identify others who would be willing to host events in their area.

## Cultivate your volunteer organizers and leadership base through...

### ***Regular communication***

Communicate regularly with your grassroots leaders and organizers in order to support their work. You should assume that the personal investment of time and energy that these organizers are making is equivalent to the financial contributions of a high-dollar donor—acknowledge this investment through regular “insider” updates and frequent expressions of appreciation.

### ***Respect local autonomy while providing leadership and direction***

Remember that your grassroots leaders signed-up to organize an event because they support your cause or campaign. So provide them with the clear goals and direction that they need to make the program a success, while respecting the autonomy of the local organizer. Publicly acknowledge that your role is simply to provide the volunteer organizers with the support and resources they need to make the local events a success.

Most importantly, **provide step-by-step organizing and planning guides** that (1) outline the specific program goals and (2) simplify the steps required for organizing a local event, meeting, or party. Think through every detail of the event as if you are a grassroots organizer:

- Is there an action that you are asking everyone to take?
- Fundraising goals?
- Talking points, special announcements, or facts to communicate to the group?
- Dial-in numbers for a conference call?

Be concise, and include hard copies of these planning guides along with any additional materials that you may be sending to leaders (ie. DVD's, contribution forms, stickers, etc.). Keep in mind that many of your leaders, especially the newer leaders, will follow your guide closely through every step of the planning process and even during the actual event.

### SAMPLE ORGANIZING GUIDES, AGENDAS

To receive copies of sample event planning guides and agendas that you can customize for your program, contact Michael Silberman at EchoDitto:

Michael [at] echoditto.com  
+1.202.449.5644 x111

### *Ongoing support*

This will be the first time that many of your leaders will have organized such an event, so they are likely to have questions throughout the planning and preparation process. It's important to reinforce for these organizers that they're not alone in the field – that you or someone else on the other end is willing and able to support them. Find ways to be available to these organizers and ensure that everyone receives a timely response.

Keep in mind that hearing from your volunteer organizers is a good sign that they are active and engaged. Also keep a tally of the questions you receive or problems encountered. Communicate the answers to frequently asked question or concerns to the entire group as soon as possible to both assist others and also to demonstrate your responsiveness and attentiveness to organizers' needs.

If you are launching new web-tools or asking your leaders or participants to use new technology, setup a helpdesk or special email address where people can send questions and get help from a real person. The questions and inquiries you receive will help you to monitor for technical issues and allow you to discover trouble areas or points of confusion.

*“Thanks for the response. It's rare to have organizers respond individually to comments that are sent to them. This has already motivated me to make next year's event on May 21st better than this year. Thanks and more later. Matongo.”*

*— Email sent to FightHunger.org's online organizer in response to a personal reply*

### *A dynamic, two-way communication system*

Once you have a growing network of leaders in place, keep these leaders engaged and interested by communicating regularly *with* them, not *at* them. Find ways to foster dialogue between and among leaders so that you're not doing all of the talking. Your role is to listen for trends and then re-communicate the best practices back out to the larger group along with your specific campaign objectives. Here are some other tips for maintaining good lines of communication:

- Watch your tone, and avoid speaking to “the masses.” Regardless of how large your leader network grows, it will always be smaller than the full membership list, and your tone should reflect the intimate, special nature of this leadership core.

- Vary your communication mediums to maintain interest, and over-communicate to ensure that your message points are conveyed effectively. Repeat your messages in different ways through emails, conference calls, and posts to your message board, listserv, or blog.
- Assume that your leaders are only paying half as much attention as you'd like them to be, and publicly acknowledge that they have busy lives outside of their volunteer work.
- Remind yourself of the difference between leaders and participants. Many of your messages ultimately need to ripple beyond the leaders to a second universe of participants and beyond. Your volunteer organizers and grassroots leaders will be responsible for conveying this information, so be sure that your communications are clear and simple enough to be repeated!
- Encourage collaboration: Help the community of leaders grow stronger by developing mechanisms for good cross-channel communication (e.g., Yahoo! email discussion groups, conference calls, etc.) that can take place independent of you or your organization.
- Solicit feedback and let your leaders know how you've incorporated their ideas.

### *Listen, and Create a Feedback loop*

Your grassroots leaders on the ground gain incredible insight every time that they organize an event. Survey your leaders—and your participants, if possible—to find out what worked and what didn't work both during the event preparation and at the actual event. You're likely to be surprised at what you discover.

Setup a communication loop that allows you to receive feedback and input through a variety of methods, as your grassroots leaders will naturally communicate in a variety of different ways, not just the way that is easiest for you.

Plan to **survey your leaders and participants** within 24 hours after the events take place, while people are still buzzing about what happened and still eager to share information and stories. See the sample survey questions in the Appendix, and minimize the questions you ask of event participants, as participants will generally be less engaged and invested than your event leaders.

Thank people immediately for taking action. Later, tell the whole story about what happened — data (how many actions), anecdotes, and results. Remind them how this event or action fits in with your shared long-term objectives. And preview what's coming next—encouraging their continued involvement.

If you have a blog, start an open thread for people to share comments and stories from each of the different events that took place. When you communicate to the media and broader membership about what happened at the events, you will be encouraging those who didn't attend to consider participating next time.

## Appendix, and Supplementary Materials

### Sample recruiting script

*Adapt this script to meet your needs.*

Hi, is this NAME? (or: Is NAME there please?)

This is \_\_\_ calling from [organization/campaign].

I'm calling to thank you for your past support with [be specific!], and also to let you know about an exciting opportunity coming up called \_\_\_\_ [name of program]

Since there are less than \_\_ days until [the election / the Congressional vote on X], we're ramping up our campaign to \_\_\_\_ by launching \_\_\_\_ [name of program]. At the end of the week, on [DATE], our goal is to have X \_\_\_\_ [insert program] parties/events happening across the \_\_\_\_ [county/state/country/world].

The \_\_\_ events are [fundraisers / casual gatherings / happy hours] that encourages our supporters to host or help organize parties and to join a conference call with special guests.

We're encouraging our hosts/leaders to set fundraising goals of \$XX—one dollar for every precinct [OR attendance goals]. It's easy! That means just XX friends contributing an average of \$XX each.

Being a host is really simple. All you need to do is invite your guests to your home, get a speakerphone for the conference call, and have a good time! We've prepared planning guides for our hosts, and we'll work with them between now and the event to ensure that they have all the training and support that they need.

So, can we count on you to host an event?

*If YES, confirm complete contact info on call-sheet:*

*Name, mailing address, email address, and telephone number.*

*Give the host the link to the web site and ask him/her to list the party there asap so that others can find it and so that he/she can begin inviting others.*

*If NO...*

ASK 1: Okay, no problem. Would you be interested in being on a host committee of an event/party in your area?

OR: That's okay. You can still raise much-needed funds/support online by \_\_\_\_ [alternative action via website]

ASK 2: There's going to be lots of work for everyone as we get closer to the election. Would you be willing to help out in your area this fall for the election?

Thanks for your time – have a good night.

## Post-event Survey Questions

During the peak of the Dean campaign's Meetup program, more than 75% of grassroots event leaders reported post-meetup data by responding to monthly surveys managed by the open-source PHPsurveyor tool. Here are some of the questions asked of event leaders:

1. Did you play this month's Dean video at the Meetup? [Y / N / Comment]
2. OPTIONAL: Any good letter-writing stories, Dean stories, or testimonials? Please add any additional comments about your Meetup here.
3. How many Meetups has your group had, including this month's?
4. How many Meetupers attended this month?
5. How far did most people travel to get to your Meetup tonight? [1-5 for each time range given]
6. How would you describe the diversity of your group? [Seniors, Minorities, Young People]
7. What was the ratio of new to returning members?
8. Did you join a pre-Meetup organizing call with DFA? [Y/N]  
If so, how would you rate its usefulness on a scale of 1-5? [1-5, Comment]
9. What's the Dean scene in your area? [Comment]
10. What, if anything, would you like us to do differently in future versions of the Meetup organizing kit or online planning page? [Comment]
11. What single most important piece of advice would you give to new meetup coordinators? [Comment]
12. Did you send a media advisory out before the MeetUp? [Y/N]
13. Did members of the press contact your group before the MeetUp or attend your MeetUp? [Y/N]  
Who, or which media outlet? [Comment]
14. Was your venue ... [options re whether or not the venue was chosen by individuals, by Meetup.com, or by the group leader]
15. On a scale of 1 to 5, how would you rate your venue? (ie. How suitable was it for your Meetup?)

Meetup **participants** who RSVP'd 'yes' for an event were asked to respond to the following questions. While response rates were lower for participants than for leaders, the answers provided valuable data about the success of each month's event in each location.

1. Please rate your event [1-5]
2. Please rate your venue [1-5]
3. Estimate the number of other people in attendance [#]
4. Any comments that you'd like to share?



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