



Aspiration's eAdvocacy Capacity Mentoring Methodology

Since 2005, Aspiration has been developing a program focused on building capacity for “eAdvocacy” in grassroots nonprofit organizations. eAdvocacy, short for “electronic advocacy”, is the utilization of internet tools and organizational processes for connecting with online audiences, developing relationships and mobilizing for action both online and offline. The main targets of Aspiration’s eAdvocacy capacity-building efforts are social justice organizations serving socially, economically and politically marginalized communities.

This work has been generously supported by the California Consumer Protection Foundation and by the ZeroDivide Foundation. We are grateful for their vision and partnership in identifying a critical area of need in social justice movements, and supporting our research and service delivery.

This paper describes Aspiration's eAdvocacy Capacity Mentoring Methodology as it exists today, explaining the cohort-based approach and core processes. It provides background leading up to the current model, and closes with some reflections on future directions.

Background

Aspiration's initial eAdvocacy capacity building efforts focused on designing training materials and delivering live trainings to nonprofit staff members. In the pre-social media internet era, these materials focused on two primary topics: web site publishing and email campaigning.

While the content and intent of the trainings were very well received, a general critique of the model was that such trainings felt like “drinking from a firehose”, and left participants with a large amount of useful information, but no clear sense of what to try or apply first.

As a result, we made a conscious decision to evolve the capacity building methodology towards a more sustained mentoring approach, oriented around small cohorts of four to six participating nonprofit organizations. The revised program offered several ways for participants to acquire knowledge and apply learnings directly to their work. Training and support were delivered as a combination of shorter in-person workshops, regularly scheduled conference calls, and both periodic and on-demand one-on-one meetings.

The first cohort of organizations was supported by ZeroDivide Foundation, and was comprised of four of their grantee organizations: California Pan-Ethnic Health Network, Californians for Justice, Death Penalty Focus, and Filipinos for Affirmative Action. The cohort ran for two years, from early 2007 to early 2009.

Learnings from the first eAdvocacy cohort were several:

- The cohort model of sustained mentoring, which melded in-person and remote training with individual meetings, was effective, impactful, and well received by participants.
- The combination of peer-based and practitioner-led learning added substantial value, by letting participants see folks “just like them” wrestle with and solve familiar challenges, in parallel with drawing on the experience of program facilitators.
- Two years turned out to be an unwieldy program cycle, with diminishing returns in the last 3-6 months. This was in part a by-product of success; as organizations successfully realized their capacity building goals in the cohort, job roles and associated needs shifted, and the primary contacts for some of the organizations failed to be the most appropriate “eAdvocacy” staff member. The decision was made to run shorter cohort engagements in the future.
- Even after modeling for substantial organizational development challenges when proposing new technology solutions, the biggest success barriers in the program turned out to be in getting recommended technology solutions in place. The decision was made to be more conservative and opportunistic in future cohorts, working with organizations “where they are at”, and introducing smaller, simpler, less expensive tools where needed. In particular, attempts to get organizations migrated to full-featured eAdvocacy platforms like DemocracyInAction were replaced with migrations to eNewsletter tools like Vertical Response.

With the support of the California Consumer Protection Foundation (CCPF), Aspiration ran a second eAdvocacy mentoring cohort program, starting in late 2008 and running through October 2009. That cohort was comprised of four new organizations: CANFit, Greenaction, Greenlining, and The Utility Reform Network (TURN). Participating organizations committed to a 9-month program that ran from January to October 2009.

CCPF has generously funded a third mentoring cohort, for which the program will be started in November 2009.

Methodology Overview

This section describes the Aspiration methodology as it exists at the transition between our second and third eAdvocacy cohorts. The second cohort enabled us to codify a number of best practices into clear, easy-to-implement processes. We now have what we know to be a mature, replicable program model which we are very excited to try and scale in a number of ways, including expanding individual cohort sizes and running networks of cohorts to support dozens of organizations in parallel.

The Aspiration mentoring methodology is based on both experience and philosophy which dictate that effective online advocacy derives from the following time-honored, process-driven

activities:

- **Setting Goals:** Identifying concrete and measurable communications and support-building goals in concert with overall organizational and campaign goals.
- **Developing a Strategic Plan:** Creating and evolving an online communications strategy plan that defines target audiences, tactics to achieve stated goals, and a time line for achieving key milestones.
- **Selecting Appropriate Tools:** Identifying and adopting technology tools and vendors within the parameters of acceptable cost and functionality trade-offs. The range of technology tools that may be incorporated in an online communications strategy includes websites/content management systems (CMS), bulk emailers, social media tools (Facebook, Twitter, YouTube, etc), constituent relationship management tools/databases (CRM), online activism tools (e.g. petitions, electronic “letter-writing” to officials), online donation tools, and internet-supported organizing tools that help organizations build support both online and off.
- **Allocating Human Resources:** Developing, hiring, and/or tasking the staff needed to effectively implement an online communications plan.
- **Following sustainable, well-defined processes for communicating online:** Adhering to document processes for assessing online audiences, planning and publishing messages, and for tracking the impact and effectiveness of those communications.

The cohort methodology is shaped and informed by the above framework, and strives to translate it into well-defined processes will clear steps for implementation.

Establishing the Cohort

Before any collaborative learning processes can be conveyed or put in place, you need some cohort participants.

Outreach efforts to recruit participant organizations is done through whichever channels are appropriate for establishing a given cohort. These can include fellow grantees of the funder, networks in a geographic region, or those with a specific programmatic focus.

Our experience indicates that organizational size, budget and staff capacity are the most important traits on which to seek alignment within the cohort. Otherwise organizations who, for example, are struggling to allocate enough time for one staff member to do impactful online work have a hard time relating to challenges of organizations with substantially more staff and budgetary resources; effectiveness issues don't overlap as well and shared learnings are more diffuse. On the other hand, heterogeneity of issue areas seems to be a plus, as organizations feel less direct competition with others who are targeting different audiences on different issues. That said, we would welcome the opportunity to work with a

network of practice or subsector peer group, because we believe that common issue focus can be leveraged as an accelerator for collaboration and innovation.

The cohort engagement for each selected organization follows an overall arc:

1. Explain the program and agree on explicit levels of commitment and participation.
2. Conduct an initial consultation and comprehensive intake assessment for participating organizations to identify their greatest deficits in online communications capacity.
3. The initial programmatic component for the project is an all-day, baseline e-advocacy training that builds out frameworks for action and further planning.
4. Each participating organization develops a simple strategic online communications plan for a selected programmatic or advocacy initiative and, in consultation with Aspiration, implements one or multiple components of that plan over the course of the program.
5. Ongoing assistance helps participating organizations match tools to specific goals and tactics in their online outreach efforts. Mentoring sessions, scheduled conference calls and in-person meetings support implementation and progress towards those goals.

In order to join the cohort, the following are requirements for participation in the program:

- Participating organizations should already have a functioning web site which they can update, and a basic electronic mailing list is preferred but not required.
- Each organization must identify a full-time staff member who will serve as the primary participant in the capacity building program. Other organization staff are welcome and encouraged to participate in the program, but the designated staff member will serve as the primary point of contact and engagement for all aspects of the program, including trainings, cohort conference calls, community blog and organizational online communications.
- In general, an overall time commitment of one to four hours per week is expected for each organization's primary participant to work on eAdvocacy-related tasks, with two to four hours per month spent directly on program activities. This number will vary depending on phases of each organizational campaign, offered trainings, and scheduling of other program components, including conference calls and community blog participation.
- Additional time is required in the program start-up phase, during which Aspiration works with each organization to assess their current technology and eAdvocacy capacity goals, and identify any needed enhancements to support eAdvocacy efforts.
- Periodic check-ins and assessments allow Aspiration to work with each organization to

verify that they are receiving benefit and scaling their eAdvocacy capacity.

In particular, senior management at participating organizations must be committed and accessible to the process. In concrete terms, this means providing participating staff with resources necessary for successful campaigning, including:

- **Consistent access** to organizational stakeholders whose input is required for the target campaign;
- **Decision-making authority** and ability to update appropriate sections of the web site;
- **Ability and authority** to message to appropriate organizational electronic mailing list(s) and other online channels on a regular basis.

Organizations electing to enter the program sign a memorandum of understanding, confirming their understanding and agreement with the above requirements. It is current policy for the program to require an in-person meeting with the Executive Director of each organization before the memorandum is signed.

Cohort Learning Model

The program kicks off in earnest with a simple social event, a 1-2 hour beverage break immediately after work hours to get participants introduced and familiar with each other's work.

Ongoing activities include:

- **Bi-weekly conference calls:** Cohort participants attend 30 minute to 1-hour calls to compare experiences, challenges, and successes. The exact time of these calls is scheduled and fixed once all participating organizations are confirmed, and stays fixed for the duration of the cohort. These calls utilize a service such as freeconferencecall.com, where participants dial a designated toll number.
- **Periodic one-on-one calls:** Aspiration consults with each organization several times during the program to discuss their specific campaigns, needs, and questions. Senior management, preferably the Executive Director, is expected to join in these calls when possible, or alternately to make themselves available for check-ins regarding the program.
- **Blogging to cohort blog:** Each participant is expected to do blog posts narrating their eAdvocacy work, posing questions for the cohort, and noting learnings. It is understood that this blog is only accessible to participating organizations, Aspiration, and designated Aspiration eAdvocacy trainers and guest participants. In respect of cohort privacy, it is never acceptable for any participant to republish the contents of the blog in any form without the permission of Aspiration.

- **Reading and commenting on blog posts made by other program participants:** Participants also agree to actively engage in online discussion regarding blog posts made by other program participants.
- **Tracking other email lists:** Participants are expected to subscribe to the advocacy-related mailing lists from other campaigning organizations including all of those in the cohort, and to read and study those emails for insight on how to design and execute their own campaign messaging, as well as to provide peer feedback. Examples of possible “external” mailing lists to be tracked include MoveOn.org, TrueMajority.org, Ella Baker Center, and Credo Mobile.
- **Periodic trainings for program participants:** These trainings fall into two categories; “tune-up” trainings review core concepts and explain more advanced features of eAdvocacy processes and tools, while “emerging technology” trainings highlight promising new capabilities such as social networking tools and mobile devices. Training topics and times are established in consultation with each organization, and do not exceed 3-5 trainings per cohort.

eAdvocacy Process Framework

In parallel with the operational processes described above, the program focuses on conveying four essential eAdvocacy processes for sustainability online impact:

- **Audience Assessment:** Organizations must assess whether they really know who they are talking to online. First and foremost, web traffic must be assessed using a tool such as Google Analytics to measure numbers of visits, pages viewed, popular search keywords and referring pages that drive traffic to the site. In addition, more experienced participants can track which mailing list segments drive traffic to the web site, as well as any traffic coming from social media efforts.

Other forms of audience assessment include tracking which and how many recipients are opening email messages and clicking on links embedded in those messages. Which and how many users are following on Facebook, Twitter, and social networks are also worth tracking for trends and patterns. Finally, those who comment on and subscribe to any organizational blog are a very strategic audience to understand and track.

- **Publishing Matrix:** Very few organizations have an intentional model for when to use specific online tools for specific purposes, or how to coordinate their use of different online channels to greater effect. A “publishing matrix” offers an integrated way for deciding which messages go to which online channels: what’s tweet-worthy, what is “just” web content. Cohort participants create a matrix for their online efforts, based on the following explicit steps using a spreadsheet tool:
 - Each online channel (web site, email list, blog, Facebook, Twitter, etc) is labeled as a column in a spreadsheet.

- Each type of online content an organization publishes (eNewsletters, press releases, event announcements, blog posts, etc) are allocated a row in the spreadsheet.
- For each content type, an “X” is placed in each cell in that row corresponding to a channel where that type of content is publicized. For instance, an org might tweet about a blog post, but not tell their mailing list. eNewsletters may be mentioned on the web site, but perhaps not on the blog. And it's certainly the case that most tweets won't ever find their way into the more traditional web and email channels.

Organizations then use their matrix to drive publishing process. Whenever any online content is published, the matrix provides a simple deterministic guide on where to cross-reference it to maximize distribution and drive traffic. Having a document and process that dictates these patterns removes pressure to “figure it out” every time, and creates consistent messaging patterns and process.

As an example of this process in practice, refer to the Aspiration publishing matrix:

<http://www.aspirationtech.org/training/eadvocacy/templates/publishingmatrix>

- **Message Calendaring:** Most organizations campaigning online have short messaging horizons; it's the exception when an organization has planned out message content more than several weeks in advance. This represents a missed opportunity, as the most impactful online communication follows narrative arcs, with senders intentionally weaving recipients into the story line and narrative of campaigns and programs.

Each cohort organization creates a message calendar that maps out the subject lines and “asks” of each message they'll send in their campaign, as well as any other notable online and offline events (petitions, social network campaigns, rallies, protests, conferences, etc). While such calendars invariably evolve, they provide a scaffolding for establishing narrative arc, and for considering aggregate outbound communications for consistency and coherence. Such calendars also enable coordination of internal processes and projects, and help to avoid “list fatigue”, where communications saturate recipients' inbound channels and lead to unsubscrition and other non-positive reaction.

- **Social Media “Dashboarding”:** The newest entry in the cohort process canon is the concept of dashboarding: using free or low-cost online tools to track where an organization, its issues, and key stakeholders are being mentioned online, from Twitter to blogs to random web sites. Examples of these tools include iGoogle, NetVibes, Radian6, and Filtrbox, and span a range of price points. Dashboards track strategic keywords and tags to assess both whether outbound messaging propagating as well as whether others are mentioning the organization and its work. A specific use case of such dashboards is to receive prompt notification when an organization is mentioned in a blog post or comment, to enable program staff to add appropriate responses or

appreciations for the mention in a timely fashion.

For reference, Aspiration's public social media dashboard can be viewed at

<http://www.netvibes.com/aspirationtech>

Across all of the above processes, cohort participants are encouraged to consider key variances across the spectrum of online engagement channels. These include:

- **Target audience:** Different channels represent different audiences; for example, users of email and Twitter have rather different profiles.
- **Tone and voice:** In channels like a web site, more traditional and slightly formal voice is appropriate, whereas on Facebook and other social networks, a more intimate, first-person tone is essential to credibility.
- **Frequency of message:** Email messages must conform to time-tested frequencies to avoid perception as organizational spam, while social media channels can benefit from multiple updates per day.
- **Control of message and brand:** Effective use of social media tools involves giving audiences a role in your work and messaging. This is almost always a challenge for grassroots organizations.
- **Time and labor investment:** While time requirements for web and email efforts can be historically known, engagement on social media channels can expand to fill available time.
- **Return on investment:** While traditional web and email efforts can be somewhat correlated to online donations and other outcomes, it is still very difficult to compare ROI channel to channel, or even to establish benchmarks by which that return can be best measured.

Underpinning all of the above and reinforced throughout cohort engagement is the essential and fundamental value of organizational data.

Organizations think of technology in terms of software, hardware and services, in no small part because those appear as line items in annual and campaign budgets. But the value of data dwarfs any related costs for associated technology. And data outlives technology every time; technology tools are vessels which maintain, enhance, and convey data into the future. The program reinforces five fundamental data concepts:

- **Unity:** Each organization should know the universe of their data and treat it as such, no matter where it is hosted or what tool is used to manage it.
- **Redundancy:** Organizations should have a complete and sustainable backup process,

complete with off-site storage.

- **Control:** Organizations should take steps to avoid losing access to data, by downloading remotely hosted data on a regular basis and following best practices for storing and routine as much data as possible through the organizational domain name as opposed to third-party sites.
- **Portability:** When selecting technology, it is essential to confirm migration options in advance. In addition, it is best to presume all technologies will become obsolete or be superseded, and to create contingency plans in advance.
- **Privacy:** Data represents a trust relationship between an organization and its network of supporters, and it is critical to honor that by publishing and rigorously following a privacy policy for all organizational data.

It is when organizations make the connection that the publishing processes above are designed to grow and sustain their organizational data in order to build digital power that they can really begin to see eAdvocacy capacity gain.

Future Directions

As mentioned above, the California Consumer Protection Foundation has generously funded a third mentoring cohort for 2009-2010. The following are directions in which we hope to take the program both in the next year and beyond.

- **Scaling:** We are actively seeking other foundations with which to partner in mentoring their grantees and network members. Our hope is to establish a full-time eAdvocacy staff position at Aspiration, and to provide support for multiple cohorts while also offering trainings and seminars to the larger nonprofit community.
- **Richer online offerings:** All of Aspiration's training materials are available on our web site under Creative Commons licenses. But in their current incarnation, they are simple presentation-oriented materials. As a core component of our scaling strategy, we plan to offer webinars and explore the user of other online teaching and learning tools. New funding from CCPF will also allow us to create online tools for generating core assets such as publishing matrices and social media dashboards.
- **Cohort of mentors:** In order to truly scale the program, we need to be developing more individuals capable of mentoring practitioners in other organizations. We plan to continue engaging program alumnae and inviting them into current work and events as we identify and nurture those most interested in imparting their eAdvocacy knowledge to others.
- **More direct incorporation of social media into program collaboration:** The current model has utilized a combination of mailing list and blog to support virtual cohort communications. Future cohorts will leverage social networks for cohort collaboration

as well in order to immerse participants in the tools they need in order to diversify and reinforce their online messaging.

Conclusion

The Aspiration eAdvocacy Capacity Mentoring Methodology is a mature and well-received program for helping grassroots organizations achieve impactful online communications.

While still a work in progress, the current program, with its focus on four primary processes, is a well-defined solution to the eAdvocacy capacity building needs of many nonprofits and social justice organizations. We welcome inquiries from anyone interested in partnering in this work, participating in a future cohort, or supporting the program in both financial and non-financial ways.

We are grateful for the visionary support of CCPF and ZeroDivide, and look forward to magnifying the impact their support as we scale and grow this program.