

# High Impact eAdvocacy

# Introduction to Online Tools for Nonprofits

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# Introductions

## ▶ Matt Garcia

- Director of Communications & Training
- [matt@aspirationtech.org](mailto:matt@aspirationtech.org)

## ▶ Aspiration

- Nonprofit
- <http://www.aspirationtech.org>
- Help social justice orgs use technology better for their missions



# Coming Up

- ▶ Review common types of nonprofit tech tools
- ▶ Look at how to connect them to your work
- ▶ Understand their place in the larger ecosystem

Web Sites

Donations

Events

Email Blasting

Advocacy

Contacts

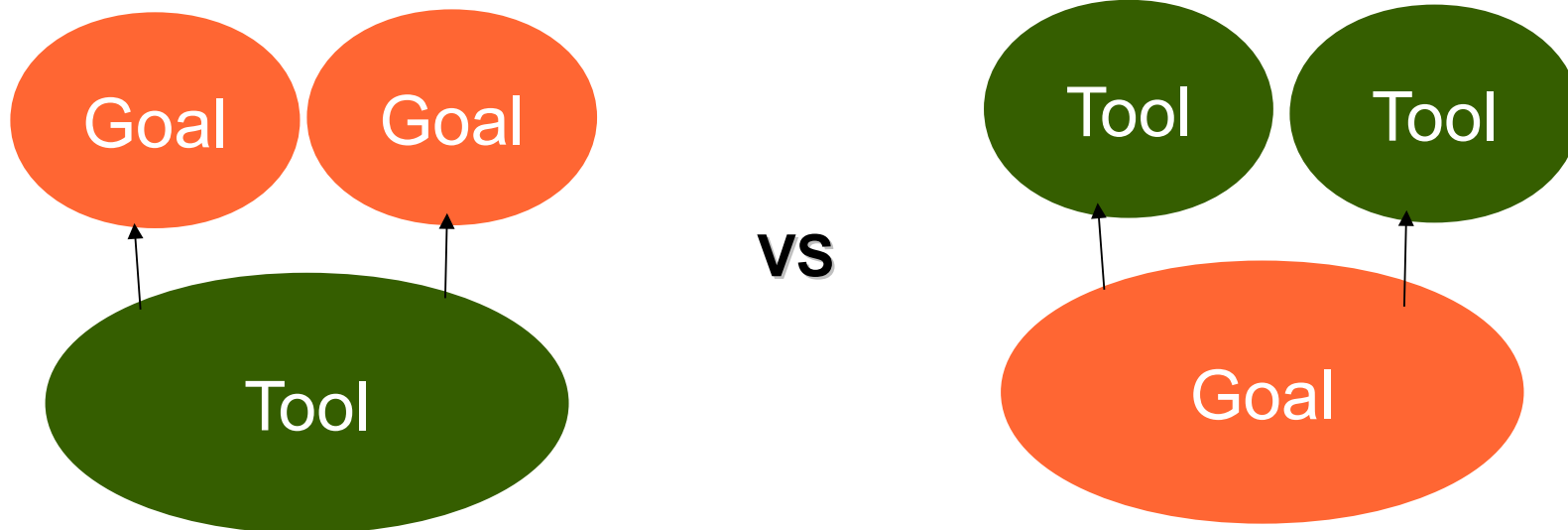
Multi-Function Tools

Project Management

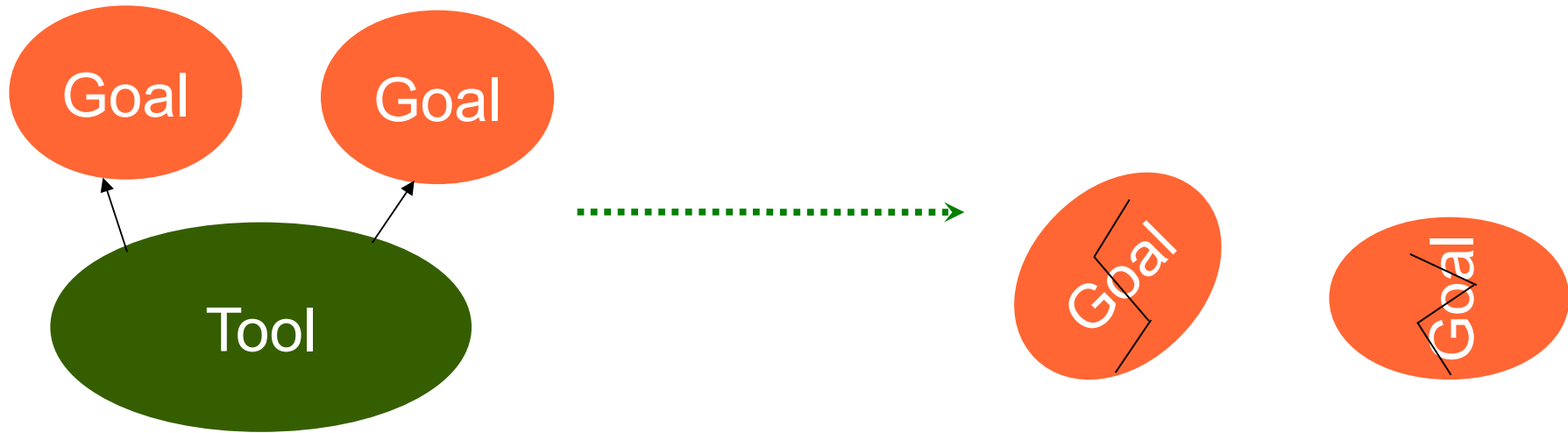
Social Media

# What are your goals?

- ▶ Measurable
- ▶ What does success look like?
- ▶ Tool-Agnostic
  - Make sure your communications plan stays in tact when the tool you are using fails you



# Tool Agnostic?



# Example Nonprofit Goals

| Goal   | Measurability   | What does success look like?                 | Tools   |
|--|---|--|---|
| Increase donations through online efforts for scholarships | <ul style="list-style-type: none"><li>• Can ask people how they heard</li><li>• Track referring link of Donation Thank You page</li></ul>               | 2 scholarships funded through online efforts | <ul style="list-style-type: none"><li>• Web Site</li><li>• Facebook</li></ul> |
| Increase attendees at annual event through online efforts  | <ul style="list-style-type: none"><li>• Compare this year's attendance to last year's</li><li>• Have a "How'd You Hear" place on registration</li></ul> | 10% increase in attendance from last year    | <ul style="list-style-type: none"><li>• Twitter</li><li>• Texting</li></ul>   |

# Data > Tools

- ▶ Think of tools as impermanent
  - Tools fall away, data (hopefully) stay
- ▶ Data is the most important organizational asset
  - Content
  - Contacts
  - Process
- ▶ Plan for tech divorce when you choose a tool

# Data > Tools

- ▶ Open Source Tools
  - Anyone can view the underlying software code
  - Little or no licensing cost, upgrade costs
- ▶ Community Supported
  - Mission-driven, not profit-driven
- ▶ Open source tools leave you in a leveraged position with your data
  - You're not tied to a specific person or company

# Web Sites

- ▶ Manage, organize and create web site content
  - Content Management System (CMS)
    - Manage a web site with a visual interface (buttons, WYSIWYG) rather than digging into raw code (HTML, CSS, PHP)

- ▶ Common Examples:

- Wordpress
- Drupal
- Joomla





# Web Sites



Social Source Commons Blog 2 3 New

**Dashboard**

[Home](#)  
[Updates \*\*2\*\*](#)  
[Akismet Stats](#)

**Posts**  
 **Media**  
 **Links**  
 **Pages**  
 **Comments **3****  
 **Appearance**  
 **Plugins**  
 **Users**  
 **Tools**  
 **Settings**  
 **Digg Digg**  
 **StatPress**  
 **E-Mail**  
 Collapse menu

**Dashboard**

### Right Now

| Content              | Discussion                       |
|----------------------|----------------------------------|
| <b>137</b> Posts     | <b>235</b> Comments              |
| <b>5</b> Pages       | <b>176</b> <span>Approved</span> |
| <b>12</b> Categories | <b>0</b> <span>Pending</span>    |
| <b>339</b> Tags      | <b>59</b> <span>Spam</span>      |

Theme **WP Framework** with **10 Widgets**

You are using **WordPress 3.3.1**.

Akismet has protected your site from 4,219 spam comments already.  
There are 63 comments in your spam queue right now.

### Recent Comments

### Plugins

[Home](#)  
**Administration**

**Dashboard**  
View and customize your dashboard.

**Content**  
Find and manage content.

**Structure**  
Administer blocks, content types, menus, etc.

**Appearance**  
Select and configure your themes.

**People**  
Manage user accounts, roles, and permissions.

**Modules**  
Extend site functionality.

**Configuration**  
Administer settings.

**Reports**  
View reports, updates, and errors.

**Help**  
Reference for usage, configuration, and modules.

# Donations

## ► Accept and manage donations

- Online Donation Processors

- Allow you to accept donations through your web site

- Peer to Peer Fundraising Tools

- Donor management Tools

- Allow you to manage donors as contacts with information attached



## ► Common examples:

- Network for Good

- Click & Pledge

- Razoo



# Donations



## ► To Consider:

- Monthly Giving
- Employer Match
- In-Kind Donations
- Look & Feel of your web site

**Gift Details**

\*Select Gift Amount:

☐ \$20.00

☐ \$50.00

☐ \$100.00

☐ \$250.00

☐ \$500.00

☐ \$1,000.00

☐ Enter an Amount

\*Gift type:

☐ One-time gift

☒ Sustaining gift

Select a Gift Duration:

Total Gift:

**Employer Matching Information**

Will your employer match your gift? ☐ Yes

**Honor Gift**

Would you like to make this an honor or memorial gift? ☐ Yes

# Events

## ▶ Create online event registration forms and manage participants

- Event Management Tools
  - Create, embed events
  - Accept registrations and payment
  - Manage registrants
- Form builders
  - Create forms that visitors can fill out on your web site

## ▶ Common examples:

- Eventbrite
- Evite
- Facebook Events
- Wufoo

# Events

**Eventbrite**

Tickets sold  
**51,531,924**

Create Event

**My Events**

My Profile

My Tickets

My Contacts

Account

Need help? Call us anytime - day or night 1-800-800-8000, Email or visit the Help Center.

Welcome eventbrite@aspirationtech.org | Logout

## March 1: Building a Social Media Dashboard

Thursday, March 1, 2012 from 12:00 PM to 1:00 PM (PT)

San Francisco, CA | San Francisco Nonprofit Technology Center

Manage

Edit

View

Find Attendees: 

Find

Unpublish

Copy

Cancel

Delete

EVENT SUMMARY ▶

**REGISTRATION**  
[Collect Custom Information](#)  
[Event Type & Language](#)  
[Add News and Updates](#)

**ANALYZE**  
[Charts](#)  
[Event Reports](#)  
[Cross Event Reports](#)  
[Google Analytics](#)

**ATTENDEES**  
[Add Attendees](#)  
[Email Attendees](#)

**Status**  
Status: Completed ●  
Page Views: 67 [reset](#)  
  
Sold: 15  
Pending: 0 ?  
Available: 0  

100%

**Total Sales**  
**Gross Sales:** \$ 0.00  
Eventbrite Fees Owed: - \$ 0.00  
**GRAND TOTAL:** \$ 0.00

**Invitations Stats**  
Email Invitations Sent: 0  
Resulting Transactions: 0  
Conversion Rate: 0%  
  
Bounces: 0  
Unsubscribes: 0  
Complaints: 0

**Recent Orders**

**Recent Attendees**

| ORDER #                  | TICKET BUYER    | QUANTITY | PRICE  | DATE         | PAYMENT    |
|--------------------------|-----------------|----------|--------|--------------|------------|
| <a href="#">71456275</a> | Jennifer Kelley | 1        | \$0.00 | Feb 23, 2012 | Free Order |
| <a href="#">70523991</a> | Anukul Gurung   | 1        | \$0.00 | Feb 19, 2012 | Free Order |

# Email Blasting

- ▶ Send organizational emails to large lists of constituents
  - Email Blaster or “Broadcast” Email Tools
    - Largely protects you from being blacklisted for spam
    - Gives you analytics based on sends, lists
    - Allows you to put together professional-looking emails (relatively) easily
- ▶ Common examples:
  - Vertical Response
  - Constant Contact
  - MailChimp

Tip:

Outlook is your evil master

# Email Blasting



0 Available Survey Responses

Home Emails Postcards Surveys Events Lists Tools Community Account Help



## Welcome Aspiration

Drag and drop below to customize your home page



### Reports

| Name   | Type     | Launch Date          | Sent | Open | Click | Boun |
|--|----------|----------------------|------|------|-------|------|
| <a href="#">Feb News Penguin Day Subject Line #2</a> | Freeform | Feb 29, 2012 1:52PM  | 829  | 16%  | 10%   |      |
| <a href="#">Feb News Penguin Day Subject Line #1</a> | Freeform | Feb 29, 2012 1:50PM  | 831  | 18%  | 8%    |      |
| <a href="#">Pre Dashboard March 1 training email</a> | Freeform | Feb 29, 2012 9:25AM  | 21   | 48%  | 24%   |      |
| <a href="#">SFNTC Pub Matrix post email 022312</a>   | Freeform | Feb 28, 2012 2:46PM  | 5    | 60%  | 140%  | 2    |
| <a href="#">SFNTC 020112 Analytics Post Training</a> | Freeform | Feb 07, 2012 11:31AM | 16   | 69%  | 88%   |      |

[View All Sent Emails](#)



### Emails

| Name   | Type     | Last Modified        |
|--|----------|----------------------|
| <a href="#">Feb news Copy HTML Capture- OK TO DELETE</a> | Freeform | Mar 05, 2012 12:23PM |
| <a href="#">Feb News Penguin Day Subject Line #2</a>     | Freeform | Feb 29, 2012 10:36AM |
| <a href="#">Aspiration expands to South Bay NEW</a>      | Freeform | Feb 13, 2012 10:26AM |
| <a href="#">Copy of Jan 2012 Google Training Announc</a> | Freeform | Feb 11, 2012 2:53PM  |
| <a href="#">Copy of Google Tech Teach-In RSVP blast</a>  | Freeform | Feb 11, 2012 2:51PM  |

[View All Emails](#)



Dear Matt,

I've been working on issues of police accountability, locked-up youth, violence, and community investment for a long time. Sometimes I think that no example of injustice could still surprise me. I was recently proved wrong by the Corrections Corporation of America (CCA).

The CCA recently invited cash-strapped states to sell them their prisons. Part of their offer was a 20-year management contract, plus an assurance that the prison would remain **at least 90 percent full**. Join me in saying: [Shame on you CCA, shame on you!](#)

Incarceration for profit is just plain wrong. Making a business from other people's suffering is wrong. And demanding that states guarantee their for-profit corporation chock full prisons is immoral. It's clear that private lock-ups have zero incentive to end the revolving door of incarceration as long as they can reap millions in profit from overcrowded cells.

Our country needs to invest in businesses and industries that, in turn, invest in our people, create real jobs and help to build a future we can be proud of. [Join me in calling on CCA to immediately rescind its 90% clause from any future contracts with states.](#) And to publicly agree that their future contracts and bids will not include **occupancy clauses**. Let's not allow the CCA to put their profits ahead of the health and well-being of our people and communities any longer.

Ever forward,

Jakada Imani  
Ella Baker Center for Human Rights

PS: [Read more about the CCA's offer and our critique of prisons based on a profit motive.](#)

### Stop Corrections Corporation of American

Tell CCA to immediately to remove any requirement to keep prisons full.

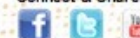


**TAKE ACTION**

[Take Action Now](#)

Ella Baker Center for Human Rights  
[www.ellabakercenter.org](http://www.ellabakercenter.org) | 510.428.3939  
1970 Broadway, Suite 450 | Oakland, CA | 94612

Connect & Share:



[Contact Us](#) | [RSS](#) | [Update Profile](#) | [Unsubscribe](#)


POWERED BY

# Advocacy

- ▶ Create action online among your constituents
  - Petition Builders
    - Allows you to create petitions then either embed, send out a link or email it to constituents
  - “Contact Your Legislator” Tools
    - Matches constituents with their proper legislator automatically
- ▶ Common Examples:
  - SignOn
  - Votizen
  - Change.org

# Advocacy

## Blue Cross Blue Shield: Henry Young Needs Rehab to Live

 **SIGN THIS PETITION**

First Name

Last Name

Email

Address

City

State

Select ▾

[Outside U.S.](#)

Zip Code

Why are you signing? [Add a reason \(optional\)](#)

**SIGN**

☒ Display my signature publicly

By signing, you accept Change.org's [terms of service](#)



Signatures

171,145 out of 200,000

Petitioning

VP of Claims Management, Blue Cross Blue Shield Massachusetts  
(+ 2 others)



Created By  
**Jason Warren**  
Washington, DC

About this Petition

Petition Letter

Petition Updates

### Why This Is Important

In October of 2011, my father Henry Young -- a 62-year-old husband and father of three who was employed with Philips Medical System in Andover, MA -- had a heart attack while in the gym at work. His heart stopped ten times, leaving his brain deprived of oxygen. After being comatose for several weeks, he miraculously awoke one day and began making great strides towards recovery. Currently undergoing rehab at Whittier Rehabilitation Hospital, he has made enough progress to convince his medical team, family, and friends that with continued rehab he will regain functional motor and cognitive skills.

Despite the critical progress my Dad has made in recent weeks, his insurance provider **Blue Cross Blue Shield** will cease coverage of my father's rehab this coming Monday, March 5, 2012. If this happens,

[Help](#) / [Feedback](#) • [Press Inquiries](#)

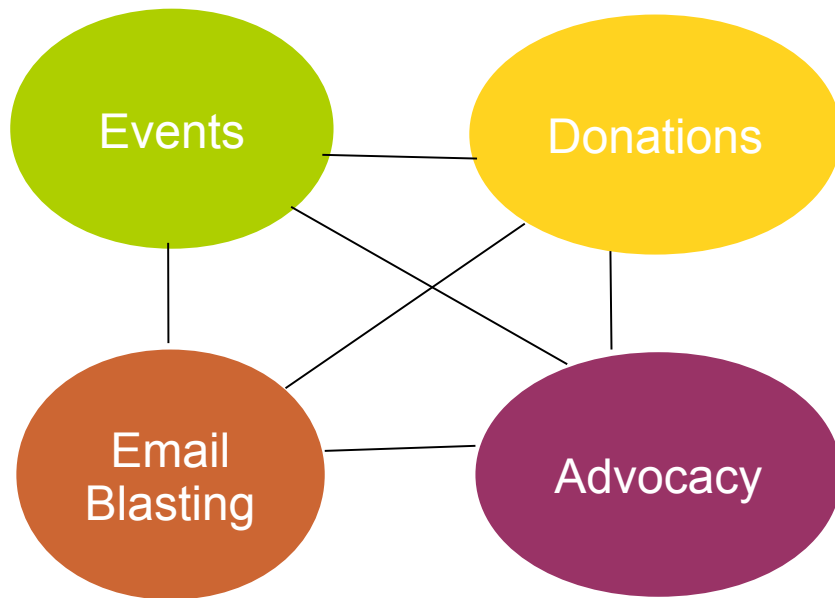
# Contacts

- ▶ Organize and manage organizational contacts
  - Constituent Relationship Manager (CRM)
    - Centralized Contact Database
    - Can attach information to contacts (e.g. event attendance, money donated, emails opened, etc.)
- ▶ Common examples:
  - Salesforce
  - CiviCRM
  - Convio



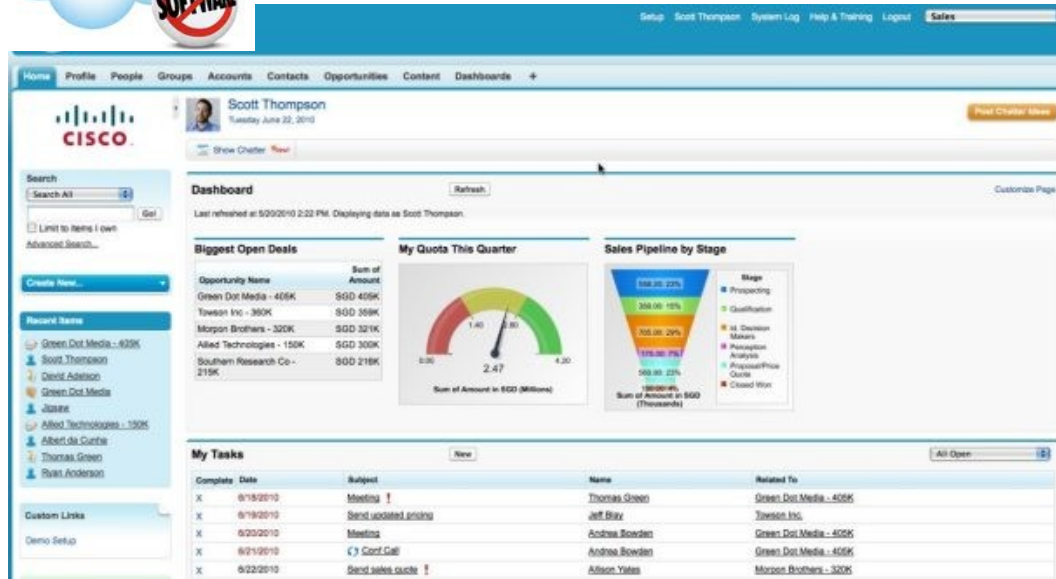
# Contacts

## "Federated" System

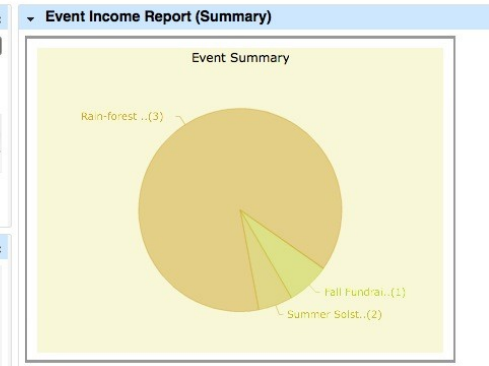
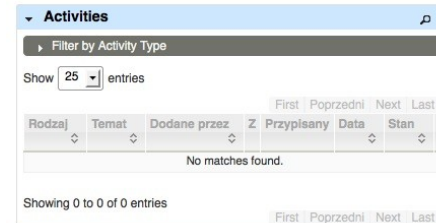


## CRM



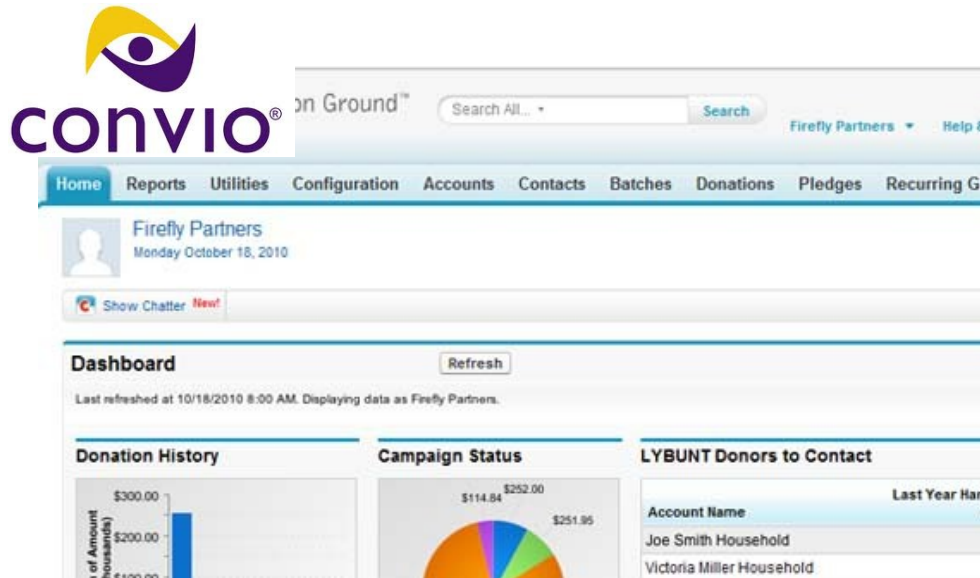


# CRMs



**Membership Report (Summary)**

| Month Beginning | Membership Type | Member Count | Total Payments Made |
|-----------------|-----------------|--------------|---------------------|
| styczeń 2011    | Student         | 1            | zł 0.00             |
|                 | SubTotal        | 1            | zł 0.00             |
| luty 2011       | Student         | 5            | zł 0.00             |
|                 | SubTotal        | 5            | zł 0.00             |
|                 | Subtotal        | 6            | zł 0.00             |
| luty 2012       | General         | 10           | zł 0.00             |
| luty 2012       | Student         | 11           | zł 0.00             |
| luty 2012       | Lifetime        | 2            | zł 0.00             |

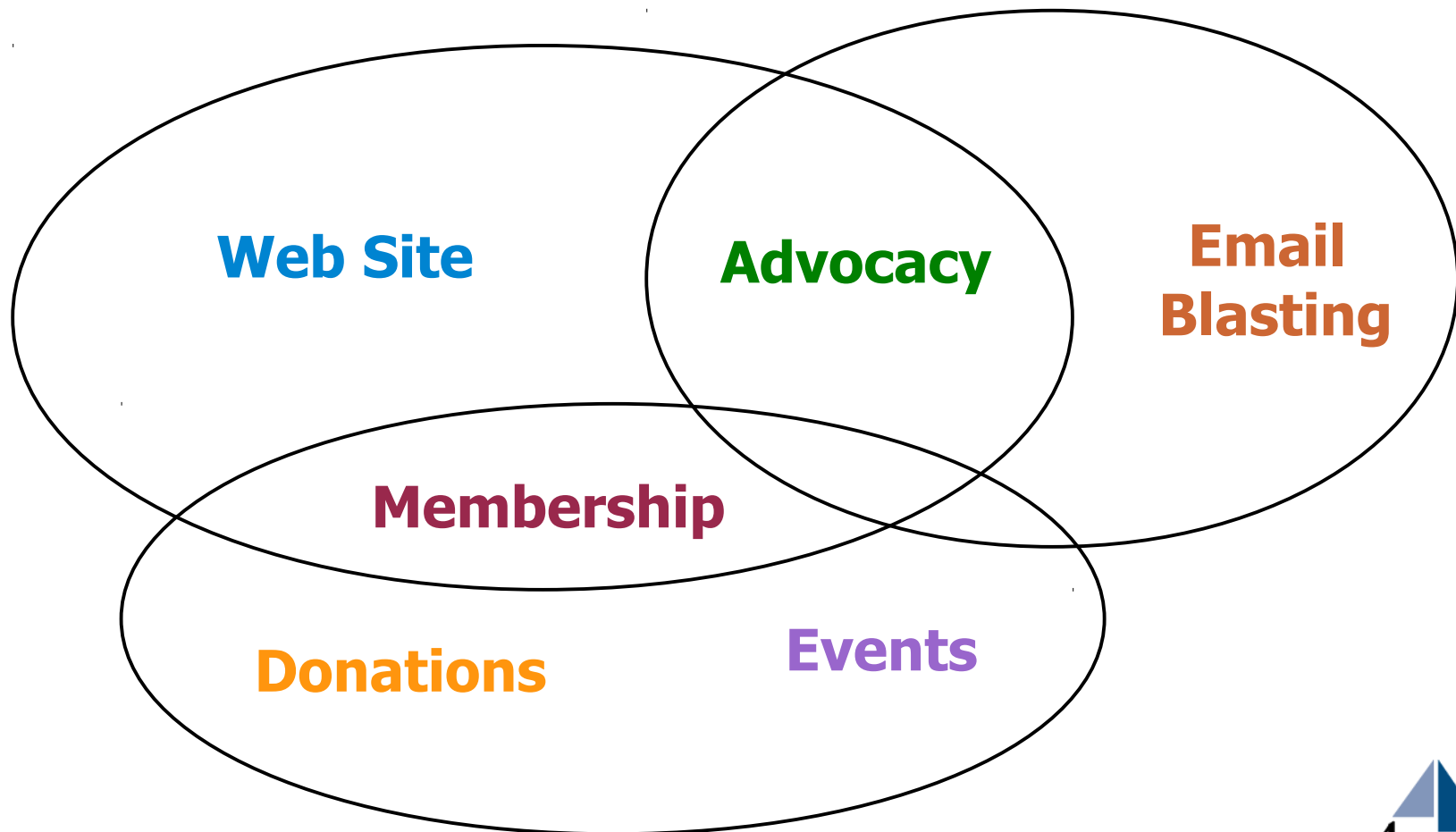


# Multi-Function Tools

- ▶ Combine functionalities from the previous tools
  - Multi-Function tools
    - Have a wide variety of function combinations (e.g. email blasting, advocacy, web site management, events, etc.)
- ▶ Many times their focus is around your contacts
  - Many integrated tools act as CRMs
- ▶ Common Examples:
  - Salsa from Democracy in Action
  - Nation Builder
  - eTapestry
  - Wild Apricot

# Multi-Function Tools

- ▶ Different tools combine different functions
  - What are you trying to get done?



# Project Management

## ► Share and manage project (or organizational) assets

- Project Management Tools
  - Share docs, calendars, tasks and files
  - Have multiple online users
- Shared server
  - Share docs, files on a local network

## ► Common Examples:

- Basecamp
- Red Mine
- Shared server

### Tip:

This is the place to share org processes and documents (e.g. Publishing Matrix, Traffic Doc)

# Project Management

**Aspiration 3.0**Matt Garcia

DashboardTo-DosCalendarAll PeopleSearch

Latest activity across your projects

[Review 18 overdue milestones](#)

| Sun | Mon | Tue                    | Wed | Thu | Fri | Sat |
|-----|-----|------------------------|-----|-----|-----|-----|
| 4   | 5   | <b>Today 6</b>         | 7   | 8   | 9   | 10  |
| 11  | 12  | 13<br>• VISTA Call 7pm | 14  | 15  | 16  | 17  |

☐ engage SBV - Jessica S.  
☐ engage SBV - Uno N.

[View the full calendar](#)

**Aspiration** — Aspiration Team

- To-do work on newsletter template [Jessica 030512](#) Completed by Jessica S. Yesterday
- To-do Send Gunner Off-Site To-Dos AND Buckets of work [Matt 030512](#) Assigned to Matt G. Yesterday
- To-do get new computer [Jessica 030512](#) Assigned to Anyone Yesterday
- To-do scc blog post about getting ride of online identity [Jessica 030512](#) Assigned to Anyone Yesterday
- To-do Thursday: Block out for Fun Work Day with Staff [Misty 030512](#) Assigned to Anyone Yesterday

**Aspiration** — TCE 2012

- File [AspirationTCE2012Budget030512.ods](#) Uploaded by Misty A. Yesterday
- File [AspirationTCE2011Budget030512.ods](#) Uploaded by Misty A. Yesterday

Create a new project

Oops, you're out of projects!  
Ask your account owner to upgrade this account to create additional projects. It only takes 10 seconds.

Your projects

Aspiration

- [Aspiration Team](#)
- [Answr/SSC](#)
- [Board](#)
- [CCPF 2011](#)
- [Communications](#)
- [Consulting](#)
- [Development](#)
- [eAdvocacy Book Sprint](#)
- [eAdvocacy Training](#)
- [Events](#)
- [Operations](#)
- [TCE 2012](#)
- [VISTA 2011](#)
- [Web Site](#)

# Social Media

## ► Converse with your community

- Blogs
  - Longer-form writing allowing conversation through comments
  - Now blog features are integrated into most CMSs
- Social Networks
  - Shorter-form content sharing
  - Various network-specific functions for interaction

## ► Common Examples:

- Wordpress
- Twitter
- Facebook
- Google Plus

Tip:

Only bite off as much as you can chew.

# Social Media

### Aspiration's Social Media Dashboard

Aspiration (631) Edit Social Source Commons SSC Blog (82) Answr NPTEch Tools OTT Dev Summit Central Valley Vista HOT aspiration New Tab

#### Twitter Search: 'aspirationtech'

THETOPICisCOOL: @aspirationtech THE TOPIC feat. J-\$tash & Slim Dolla - "You Make Me Feel Brand New" <http://t.co/Qda9ZIZP> - about 16 hours ago


aspirationtech: RT @NewMediaRights: New video competition on why Open Education matters <http://t.co/K1fh6dqb> #Creativecommons @OpenSociety - about 20 hours ago

cStreet\_ca: RT @DigitalLeapCda: "Building a Social Media Dashboard Training Materials" /via @aspirationtech <http://t.co/BZtW9w6l> #npotech - 3 days ago

DigitalLeapCda: "Building a Social Media Dashboard Training Materials" /via @aspirationtech <http://t.co/BZtW9w6l> #npotech - 4 days ago

aspirationtech: RT @cozimek: This setup looks familiar, right @aspirationtech? Circles beat theater seating for collaborative events. #joomladaygt <http://t.co/OOmTMkcN> - 4 days ago

#### Recent Uploads tagged aspirationtech



#### (89) "aspiration tech" - Google Blog Search

- User:CecileKrause329 - DevSummit 5 days ago
- User:FullertonJosephson159 - DevSummit 6 days ago
- User:JustinnFrisby680 - DevSummit 6 days ago
- User:LivoheRecebu - DevSummit 1 week ago
- User:StedmanEastman987 - DevSummit 1 week ago
- User:VexujoXokato - DevSummit 1 week ago
- User:CicukeGocume - DevSummit 2 weeks ago

#### (14) Google Alerts - aspirationtech

- Twitter / @aspirationtech/npdev 3 months ago
- Aspiration (@aspirationtech) on Twitter 3 months ago
- Social Media Best Practices for Charities draws crowd 3 months ago
- Aspiration tech: better tools for a better world : appropriatesoftware 3 months ago
- Twitter / @aspirationtech/Central Valle 4 months ago

#### Comment Search for "aspirationtech"

#### (100) aspirationtech.org - Twitter Search

- RT @DigitalLeapCda: "Building a Social Media Dashboard Training Materials" /via @aspirationtech <http://t.co/BZtW9w6l> #npotech 2 days ago
- "Building a Social Media Dashboard Training Materials" /via @aspirationtech <http://t.co/BZtW9w6l> #npotech 3 days ago
- Curious about #opensource software for #nonprofits? Register now for #PenguinDay on April 6 in SF with @aspirationtech <http://t.co/FNiz9fCO> 5 days ago
- Penguin Day San Francisco - nonprofit/opensource tech event. <http://t.co/KcLsUYNJ> Yes please! 5 days ago
- "Coordinating your Online Channels with a Publishing Matrix Materials" /via @aspirationtech <http://t.co/WqEMxcPi> #npotech 1 week ago

#### (98) aspirationtech - Google Blog Search

- aspirationtech: RT @NewMediaRights: New video competition on ... 21 hours ago
- aspirationtech: Havin' a blast at #dml2012 with @mozilla! » Every ... 4 days ago
- aspirationtech: Got a #Ci » Every Bit Helps <sup>000</sup> Live Charity Updates 3 weeks ago
- Tips to Manage Your Online Identity Through Your Gmail Account ... 1 month ago
- aspirationtech: Come by t » Every Bit Helps <sup>000</sup> Live Charity Updates 1 month ago
- ArtSpark and Aspiration Tech team up in SF this week! | art-spark.org 1 month ago
- Free And Open Source Alternatives To Proprietary SaaS Offerings ... 1 month ago

# Caveats of Online Tools

- ▶ Can take a lot of time
  - Time = Money
- ▶ Big corporations who want your data
  - You are the product
- ▶ There are billion of tools
  - Which ones do we need?
- ▶ Tools change **EVERY. SINGLE. DAY.**
  - How can we keep up?



# Limitations of Online Organizing

- ▶ Digital divides
  - Never forget who is left out by “e” strategies
- ▶ Trust relationships are best built in person
  - Online organizing is most effective when it leverages established social networks and communities
- ▶ Each community and campaign is different
  - Your mileage will vary

# Bottom Line

- ▶ Online tools aren't a magic bullet
- ▶ You need:
  - An measurable goal
  - A compelling message
  - Effective tactics to realize your goal
  - A plan for engaging supporters and well-defined ways for them to plug in
- ▶ eAdvocacy is more about organizing and organizational challenges than tech challenges

# 4 Processes for Sustainability

## ▶ Audience Assessment

- Do you really know who you're talking to?

## ▶ Publishing Matrix

- Do you have a model for when to use what tool?

## ▶ Message Calendaring

- Is all online messaging on a unified calendar?

## ▶ Tracking & Metrics

- Which techniques are working?

# In Summary

- ▶ Remember that tech should support your work as an organization
- ▶ Tools should support your tech strategy goals
- ▶ Think about the minimum to be successful and then iterate up
- ▶ Tools come and go, succeed and fail. Focus on your data rather than the tool

# Next Steps

- ▶ Define your organizational goals
- ▶ Think about what tools will help you achieve your goals
- ▶ Start tracking your measurable comms goals

# End Of Section

- ▶ Questions?
- ▶ Comments?

## Thank You!



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