



# 2ND ANNUAL CIVIC ENGAGEMENT TECHNOLOGY INFRASTRUCTURE SURVEY

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## INTRODUCTION

Over the past several years, technology has changed the fields of civic engagement, organizing, and advocacy in unprecedented ways. The proliferation of online social tools enables organizers to create social change by empowering their members and lowering the cost of facilitating group action. Increased availability of voter data and the tools to use it have led to innovations in targeting and experiment-informed programs. In light of these changes, the Funders' Committee for Civic Participation (FCCP) is engaging in an ongoing process to transform how groups who engage in civic engagement and advocacy do their work.

The FCCP contracted with the New Organizing Institute Education Fund (NOI) to develop and administer a survey designed to qualitatively gauge the need and demand for technology assistance among organizations that meet the following criteria:

- 1) Have a civic engagement, organizing, or advocacy program.
- 2) Perform individual contact and mobilization.
- 3) Are a non-partisan 501(c)(3) group.

This survey is similar to, and intended to build upon, the findings of the FCCP sponsored "2008 Voter Engagement Infrastructure Survey." It touches on a range of technology issues including membership management, access to voter files, online organizing programs, voter registration practices, and general data maintenance practices. The survey was designed to identify common capacity-building and infrastructure needs that funders can help address.

This voluntary and confidential survey was conducted between Friday, September 18 and Monday, November 9, 2009. The 94 groups who completed the survey represent a broad sample of organization types, budget sizes, and issue focus. Our thanks to State Voices, ISSI and Freeflow Digital who provided invaluable advice in the development of the survey.

## DEFINITIONS

**A/B Testing:** A method of testing content to improve response rates. For example, an organization may test different donation amounts to ask for before blasting their entire e-mail list, to optimize the amount of money they raise.

**Advocacy:** Advocacy is the effort to effect change by engaging your members and/or the public in campaigns. These campaigns often involve enabling members to contact legislative and special targets via emails, faxes and phone calls. The term "advocacy tools" loosely refers to the various tools available to help your organization engage your members, such as bulk email for contacts, "action center" pages to enable people to send a fax or letter to a target, and click-to-call functionality. Other tools are commonly offered in conjunction with these, for example: tell-a-friend email, legislator lookup, legislator scorecards, etc.

**Application Programming Interface (API):** An interface for a software program that allows other software to communicate with it and call the program's functions. For example, the Twitter API allows external web services and programs to manage user accounts, post content, etc.

**Catalist:** A national company that maintains a national voter file to assist a wide range of organizations with basic data, enhanced information, and other services.

**Civic Participation or Civic Engagement:** Activities including community organizing, issue advocacy and other activities that increase the overall engagement of individuals in civic life, that may also include the voter participation/voter engagement activities mentioned above.

**Freeflow Digital:** A technology consulting firm helping non-profits capitalize on donor and membership relationships by providing expertise on data management, data integration, and web application design & development.

**Funders' Committee For Civic Participation:** A funder affinity group. Its members support non-partisan efforts to engage voters, eliminate structural barriers to voting, advance reforms to improve government and electoral systems and inspire public involvement in civic life.

**ISSI:** Information Staffing Services, Inc. A not-for-profit corporation established to provide on-the-ground, state-based data management, targeting and coalition-building advice and services to a variety of clients including advocacy groups, charities, and progressive political organizations.

**Membership Management:** Membership management is your organization's ability to maintain a database of core information about your members (this could include name, address, etc.) as well as your ability to add other information about your members through the addition of custom fields. Most useful is a Constituent Relationship Management (CRM) system built around information that is retrieved from your member's interaction with other online tools that allows organization staff to look at the activities their members perform.

**National Field:** A hierarchical social network for organizations that mimics the organization's real-world structure and streamlines the collection and instant distribution of information to the people it is most relevant to.

**The Voter Activation Network (VAN):** An online tool which allows progressive groups to work with voter files and other databases.

**Voter Participation or Voter Engagement:** Activities that increase voter turnout, including helping individuals complete citizenship applications, voter registration, voter education, get-out-the-vote work, election administration and election protection.

**State Voices:** A network of sixteen state 501c3 tables or collaborations.

**The New Organizing Institute Education Fund (NOI):** An organization that conducts trainings, research, and implements programs focused on providing progressive efforts with the most technologically advanced techniques and tools available.

## IDENTIFIED NEEDS

**Respondents overwhelmingly expressed a need to more effectively work with their lists in a centralized and coordinated manner (ex. membership, volunteers, donors, mailing list, e-mail list). In particular, organizations experience challenges relating data between their online tools as well as any offline databases.**

- Many organizations maintain similar (or identical) data in different systems for different purposes. When information changes in one system, the data does not update in another because the databases are not synced with each other. These systems often require manual importing, exporting, and merging to keep information up to date. Furthermore, having different types of lists increases the cost of maintaining and training for these various systems. Respondents cited the following specific challenges:
  - Contact information in different types of lists are not centralized for civic engagement and advocacy purposes.
  - Databases that are designed for direct mail contact aren't linked to separate lists detailing information gathered through online advocacy or giving.
  - Donor data tracked online does not sync with donor database.
  - Difficult to integrate different voter lists or registration lists that are collected separately.
  - E-mails collected and entered in a membership database require manual action to sync with an e-mail list.
- Some organizations also lack the technical capacity to maintain different types of lists. These challenges include being limited to Microsoft Excel for data management, and difficulties in the logistics of importing and exporting various types of data due to a lack of training and resources.
- Some respondents encountered difficulty integrating VAN with their other activities, citing a need for more open APIs and increased volunteer management capabilities. For example, organizations experience a lack of ability to sync with the VAN on a regular basis beyond daily imports and exports, as well as difficulty tracking who has made phone calls and attended events in a straightforward manner. Several organizations also specifically mentioned a desire to allow VAN and other vendor platforms (e.g. the Databank and Democracy in Action) to "talk to each other."
- 31% of groups are currently unsatisfied with their membership database, and an additional 27% desire some improvements in functionality.

### Quotes Directly from Respondents:

"(1) Emails entered into our database do not automatically populate our listserves. (2) While we want to maintain one database, our current database is not ideal for donor tracking - either foundations or individuals. (3) It is a little challenging and clunky - though doable - to input data from the voter lists into our general organizational database after election cycles."

"The databases are set up to do auto-exports and sync with each other and with Catalist. These scripts and applications could be better but we haven't had the resources to build it, so too often do it manually."

"...we're beginning to use my campaigns to track volunteers and continued engagement of constituents, so we could match it to VAN. As for donors and members, we currently do not sync that information and truthfully are probably missing lots of opportunities to gain more individual members and increase giving levels."

**Organizations have indicated a desire to vastly increase the size and scope of their new media and online organizing programs, but are constrained by a lack of staffing, training, and access to tools.**

- 27% of groups expressed a need for new media support. These respondents cited a lack of dedicated staff time, as well as an interest in broadening staff expertise through training.
- Groups reported an interest in using online tools that they do not currently use:
  - 66% of groups would like to use personal fundraising pages.
  - 56% of groups would like to use Click to Call (web based tool to connect activists to legislators over the phone).
  - 54% of groups would like to use a "letter to the editor" tool.
  - 50% of groups would like to use state and local advocacy web pages.
  - 43% of groups would like to use legislative scorecards.
  - 43% of groups would like to use federal advocacy web pages.
  - 42% of groups would like to use an online events tool.
  - 41% of groups would like to use "tell a friend" functionality.
  - Tools that organizations currently use are listed in the detailed survey responses.
- 50% of groups believe they could be doing more to activate their online supporters, and another 16% do not have a strong online presence.
- Only 22% of organizations use A/B testing in their e-mail campaigns.

**Quotes Directly from Respondents:**

"We need training and information from similar organizations that have successfully implemented social media strategies without major changes in staff."

"We have a very small staff of two who are young and knowledgeable about new media but have very limited time to consistently use the tools, let alone push the envelope of what we can do with them."

"While we feel we have a good program, new trends and technology arise constantly and we need to stay educated and informed on how best to use those."

### **Respondents reported additional technology needs to improve their voter registration programs.**

- Groups cited challenges in entering data in a timely and accurate manner, integrating VAN with internal organizational databases, and desire better access and training with VAN/Catalist.
- Among the 47 groups who are likely to conduct voter registration in the 2010 election cycle, only 39% retain photocopies or electronically scanned copies of the registration application forms for individuals they register. 49% of the 47 groups match their list of registration applications to the voter file to inform their voter registration program.
- 17% of groups do not currently have access to the VAN but would like to, and an additional 29% of groups have access to the VAN but would like more access to data and features.

#### **Quotes Directly from Respondents:**

"In addition to voter registration, we would like to keep better records of ongoing contact with voters (which we can do the in the databank). Because we rely greatly on volunteers and fairly inexperienced staff to do data entry – we are always looking to ways to improve quality control. We would also like to find easier ways to sync data between VAN and theDatabank –as we really can't be entering and tracking data in both places. Although we had limited VAN access in 2008, we are not yet sure if we will have affordable VAN access in 2010."

**47% of groups are likely to conduct a randomized controlled experiment in 2010 to evaluate the impact of their voter participation strategies. However, of the groups who do not currently plan to do this, 62% are potentially interested in receiving assistance to run this type of evaluation.**

### RECOMMENDATIONS FOR ORGANIZATIONS

#### ***Data Integration***

Advocacy groups should keep data in as few different systems as possible. While the available tools are sometimes a barrier to integration, groups are encouraged to identify an individual on staff who is responsible for wrangling the organizational data. This individual does not need to be a data whiz; simply having someone "in charge" of keeping all of the data in one place can be a huge first step in helping to make the most effective use of what, in many cases, is an organizations most valuable asset – volunteer lists, voter registration lists, and membership lists.

#### ***Infrastructure Development***

Many groups rely on informal or ad hoc technical support within the organization. Groups should audit their technical needs, particularly in the areas of new media and data management, and make support of these roles explicit in their budget. For groups that are not able to hire specifically for these roles, adjustments should be made internally to adequately accommodate new media and data management. Even a minimal investment in these foundational organizational needs can yield an enormous return in efficiency, productivity, volunteer involvement, and outreach. Data management and online organizing must be integrated into overall program work or it will not be taken full advantage of. Organizations should seek out support from available infrastructure organizations who can often point organization leadership in the right direction.

#### ***Organizational Leadership***

Finally, we believe that the tools and data used for program accountability require a commitment from organizational leadership to be effective. For example, access to better data management tools must be coupled with an organizational culture that embraces improved data management practices. Without buy-in from leadership, availability of tools and technology alone will not substantially improve organizational effectiveness. This is not something that can be paid for, but rather must be prioritized in terms of staff time and campaign management. Leadership of large organizations can prioritize hiring of data directors and new media directors, both of which should be at the senior staff level. Smaller organizations should be clear about who is the primary person responsible for each of these tasks and what the most effective way to integrate these tools would be.



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## RECOMMENDATIONS FOR FUNDERS

### ***Data Integration***

Lack of organizational capacity in managing and integrating different kinds of data can be addressed by funding programs that train staff and volunteers on data management best practices. Funders can also address this lack of capacity by allocating resources to organizations for hiring data managers. Organizations that have large planned field activities without any data or targeting support must either get this support from the infrastructure organizations or they will have great difficulty running an accountable and rigorous program.

### ***Infrastructure Development***

The survey responses underscore a need for ongoing training and support in best practices for data management, new media and online organizing, voter registration, and program evaluation. We need to build organizational capacity by developing new resources for organizations in these areas, expanding existing resources, and educating organizations on what resources currently exist.

Groups would benefit from an affordable and accessible 50-state data infrastructure. For example, planning for voter engagement tools such as the VAN to be available for all states simultaneously will minimize resources spent developing this infrastructure piecemeal, and create untold opportunities for well-run organizing and campaigning at the national and local level. In particular, we would like to see the VAN membership database developed and affordable for small to medium sized organizations either through state tables or in another arrangement.

Funders should emphasize the use of randomized controlled experiments to advocates for the purposes of maximizing their impact and evaluating the efficacy of their programs. Funders should also provide organizations access to management tools, such as National Field, to encourage reporting and standards of accountability for organizing data, not just voter contact data.

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## RECOMMENDATIONS FOR VENDORS

### ***Data Integration***

Many of the data integration challenges cited by organizations could be alleviated by a concerted effort by vendors to provide better access to APIs for their tools. Rather than every organization independently developing processes to manually import, export, and merge data, increasing the availability and quality of vendor APIs will help minimize lost resources on data integration.

An increased availability of scripts or programs to automate the transfer of data would also help address organizational difficulty with data integration. For example, vendors could provide a tool that pulls data to the VAN from theDatabank and back with minimal user involvement.

### VOTER REGISTRATION

**1. Of the 94 groups that completed the survey, 50% reported that they intend or are likely to conduct voter registration in the 2010 election cycle. Among the 47 groups:**

- 43% aim to register less than 5,000 voters.
- 17% aim to register between 5,000 and 9,999 voters.
- 9% aim to register between 10,000 and 49,999 voters.
- 4% aim to register between 50,000 and 99,999 voters.
- 11% aim to register between 100,000 and 499,999 voters.
- No groups plan to register more than 500,000 voters.
- 17% are unsure of their goal because they are finalizing plans and budgets.

**2. Organizations that are likely to conduct voter registration collect and enter voter registration applications in a variety of ways. A majority of organizations use volunteers or members to collect voter registration applications, and paid staff to conduct data entry.**

- Voter registration form collection (respondents were encouraged to check all that apply)
  - 77% of organizations use volunteers or members to collect voter registration applications.
  - 68% of organizations use their own staff to collect voter registration applications.
  - 30% of organizations use paid, part-time, or temporary canvassers to collect voter registration applications.
  - 30% of organizations have affiliate groups that collect voter registration applications.
  - 10% of organizations use other means, such as the online Rock the Vote widget or planet codes that track whether direct mail applications were submitted.
- Data entry (respondents were encouraged to check all that apply)
  - 57% of respondents use paid staff to conduct data entry for voter registration.
  - 43% of respondents use volunteers to conduct data entry for voter registration.
  - 19% of respondents use a data entry vendor to conduct data entry for voter registration.
  - 15% of respondents do not data-enter their voter registration applications.
  - 17% of respondents use other means, such as the online Rock the Vote widget, or have not yet finalized their data entry plans.

**3. Respondents who intend to conduct voter registration utilize a broad range of software programs to enter voter registration data.** (Respondents were encouraged to check all that apply.)

- 51% use the VAN.
- 32% use Microsoft Excel.
- 15% use database software such as Microsoft Access or Filemaker Pro
- 13% use a membership database.
- 11% use thedatabank
- 11% use a website (such as Rock the Vote)
- 17% use other software, such as a proprietary online database.

**4. Groups that intend to conduct voter registration record the following information when data entering applications:** (Respondents were encouraged to check all that apply.)

- 72% enter biographical information such as name, address, state, and zip code.
- 68% enter phone number, if provided.
- 49% enter date of birth.
- 47% include date of data entry.
- 36% enter signature date.
- 32% enter method of collection (ex. Door-to-door, location-based).
- 21% enter location where the application was collected.
- 19% enter the name of the individual who collected the application.
- 19% enter other data (such as additional survey questions) or are unsure, because data entry varies by affiliate organization.

**5-8. Other programmatic details** (respondents were often encouraged to check all that apply)

- 39% of groups that are likely to conduct voter registration in the 2010 election cycle retain photocopies or electronically scanned copies of the registration application forms for individuals they register. However, 9% of groups do not retain copies of application forms because affiliate organizations do, or because the data is captured online.
- 49% of the 47 groups who intend to conduct voter registration match their list of registration applications to the voter file to inform their voter registration program.
- 68% of respondents who intend to conduct voter registration retain and build upon their lists of registered voters from year to year. 38% of respondents who intend to conduct voter registration match them against the voter file each cycle to measure retention.
- 77% of respondents who intend to conduct voter registration re-contact the individuals they registered for get-out-the-vote efforts.

## VOTER FILES

**9. Most groups (82%) have access to a voter file.** (Respondents were encouraged to check all that apply.)

- 53% of respondents have access to Catalist through State Voices or the local 501c3 table.
- 22% of respondents have access to Catalist through America Votes or the local 501c4 table.
- 18% of respondents have a direct contract with Catalist.
- 17% of respondents have voter file access through other means, such as affiliate organizations.
- 7% of respondents purchase the raw voter file from the board of elections themselves.
- 2% of respondents purchase a voter file from a vendor other than Catalist.
- 11% of groups are not pursuing access to a voter file, and another 8% would like access to the voter file but do not have it currently.

**10. Among groups with access to a voter file, the vast majority (83%) work with it directly. Groups also make use of targeting consultants at affiliate organizations such as ISSI (23%) and external vendors (5%)** (Respondents were encouraged to check all that apply.)

**11. A majority of groups with voter file access also have access to the VAN, but some would like additional access or features. Among organizations with voter file access:**

- 48% have access to the VAN, and are satisfied with their level of access.
- 29% have access to the VAN, but would like more data or features.
- 17% do not have access to the VAN, but would like to.
- 7% do not have access to the VAN, but do not think they need it.

**12. Organizations use a variety of resources to pull lists for voter contact.** (Respondents were encouraged to check all that apply.)

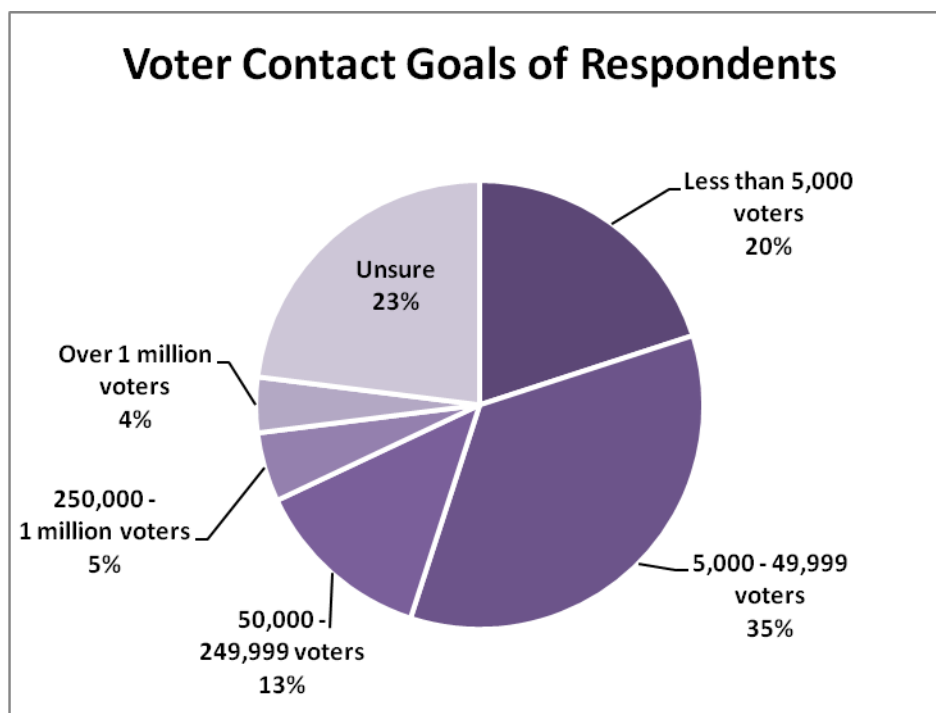
- 45% use a designated staff member to pull lists.
- 36% train their staff to use their organization's system and pull lists.
- 30% work with external targeting consultants (such as ISSI) to create contact lists.
- 9% have volunteers who are trained to pull lists.
- 13% of organizations do not conduct any voter contact.

**13. Organizations use several methods to enter data from their voter contact work. Among the 87% of organizations who engage in voter contact:** (Respondents were encouraged to check all that apply.)

- 60% use designated staff or volunteers to consolidate contact sheets.
- 16% use canvassers to enter contact data into the database after it is collected.
- 12% use Palm Pilots.
- 9% use canvassers to input data directly into the database as it is collected.
- For 29%, methods vary based on region or affiliate, conduct voter contact in modes other than canvassing (such as online or direct mail), or do not track their voter contact work.

**14. Respondents who intend to engage in voter contact reported a broad range in voter contact goals. Among the organizations who engage in voter contact:**

- 20% aim to contact less than 5,000 voters.
- 35% aim to contact between 5,000 and 49,999 voters.
- 13% aim to contact between 50,000 and 249,999 voters.
- 5% aim to contact between 250,000 and 1 million voters.
- 4% aim to contact over 1 million voters.
- 4% aim to contact over 1 million voters.
- 23% are unsure of their voter contact goals, because their plans have not been finalized or are dependent on funding.



**15. Organizations use the following tools to maintain their membership databases:** (Respondents were encouraged to check all that apply.)

- 29% use Microsoft Excel.
- 26% use the VAN.
- 22% use a custom database.
- 15% use Democracy in Action.
- 13% use Convio or GetActive.
- 10% use thedatabank.
- 7% use Blackbaud Raiser's Edge.
- 5% use Salesforce.
- 1% use Convio Common Ground.
- 1% use Blackbaud eTapestry.
- 1% use NGP.
- 36% use other software. These include Microsoft Access (8), Filemaker (3), Constant Contact (3), Sage (2), Giftworks (2), and Blue State Digital (2).
- 6% do not maintain a membership database.

**16. Organizations use the following tools to maintain their volunteer databases:** (Respondents were encouraged to check all that apply.)

- 27% use Microsoft Excel.
- 18% use a custom database.
- 14% use the VAN.
- 11% use Democracy in Action.
- 11% use Convio or GetActive.
- 7% use thedatabank.
- 4% use Salesforce.
- 1% use Convio Common Ground.
- 1% use Blackbaud Sphere.
- 30% use other software. These include Microsoft Access (7), Constant Contact (3), and Donor Perfect (2). 4 groups do not track this information in a database.
- 15% do not maintain a volunteer database.

**17. Organizations use the following tools to maintain their donor databases:** (Respondents were encouraged to check all that apply.)

- 26% use Microsoft Excel.
- 22% use the VAN.
- 20% use a custom database.
- 10% use Democracy in Action.
- 9% use thedatabank.
- 7% use Convio or GetActive.
- 7% use Blackbaud Raiser's Edge.
- 6% use Salesforce.
- 2% use Blackbaud eTapestry.
- 1% use Convio Common Ground.
- 34% use other software. These include Microsoft Access (7), GiftWorks (3), Filemaker (3), DonorPerfect (2), Blue State Digital (2), Microsoft Outlook (2) and Sage (2).
- 6% do not maintain a donor database.

**18. Organizations use the following tools to maintain their mailing list:** (Respondents were encouraged to check all that apply.)

- 26% use Microsoft Excel.
- 22% use the VAN.
- 20% use a custom database.
- 10% use Democracy in Action.
- 9% use thedatabank.
- 7% use Convio or GetActive.
- 7% use Blackbaud Raiser's Edge.
- 6% use Salesforce.
- 2% use Blackbaud eTapestry.
- 1% use Convio Common Ground.
- 34% use other software. These include Microsoft Access (9), DonorPerfect (2), GiftWorks (2), Sage (2), FileMaker (2), Microsoft Outlook (2), and Blue State Digital (2).
- 6% do not maintain a mailing list.

**19. Organizations use the following tools to maintain their e-mail list:** (Respondents were encouraged to check all that apply.)

- 20% use Democracy In Action.
- 17% use Convio or GetActive.
- 3% use Blue State Digital.
- 52% use other software. These include Constant Contact (9), Vertical Response (4), and theDatabank (3).
- 11% do not maintain an e-mail list.

**20. A majority of respondents are not completely satisfied with their membership database.**

- 23% of respondents are completely satisfied with their membership database.
- 27% of respondents are somewhat satisfied with their membership database, but desire some improvements in functionality.
- 20% of respondents are not satisfied with their membership database, but haven't switched due to a lack of resources.
- 11% of respondents are not satisfied with their membership database, but do not know of a better solution.
- 19% of respondents do not fall into the above categories, for example because they do not have members, or are still determining an optimal solution for their membership database.

**21. A majority of groups do not match their membership data to the voter file.**

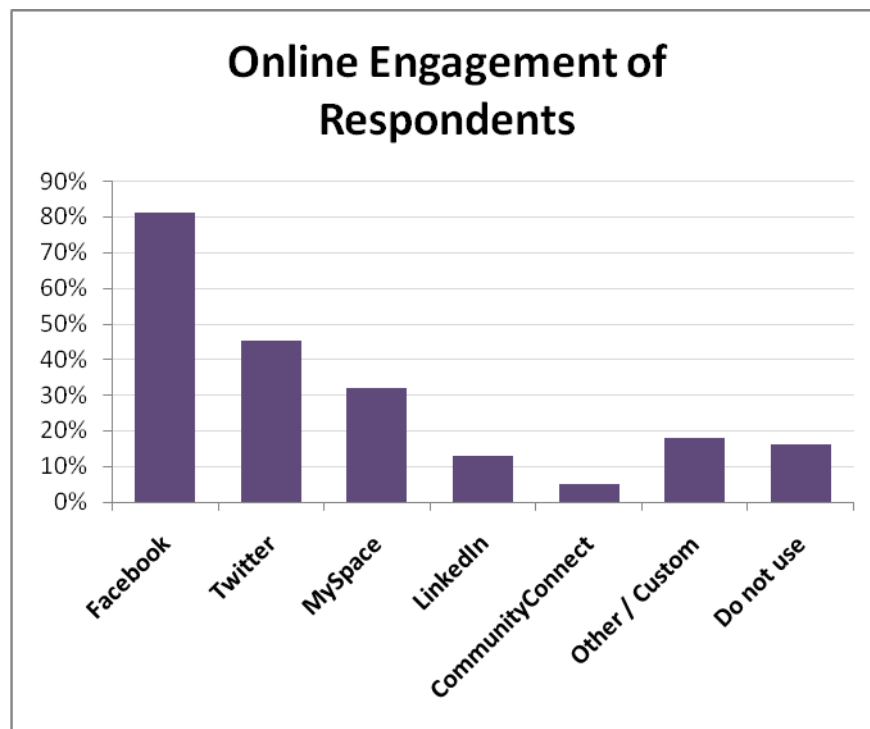
- 19% match their list to the voterfile, and share their members with a table to coordinate programs.
- 22% match their list to the voterfile, but for internal use only.
- 12% do not match their list to the voterfile, but would like to.
- 36% do not match their list to the voterfile, and have not indicated an interest in doing so.
- 10% do not fall into the above categories, for example because they do not have members, partially match their list, or are still developing a process to match their membership data to the voterfile.

**22. Most organizations do not have a dedicated new media staff member.** (Respondents were encouraged to check all that apply.)

- 23% of respondents have at least one dedicated new media staff member.
- 46% of respondents have at least one staff member who is proficient in new media and online organizing, but also has other duties.
- 34% of respondents get by with the informal knowledge of their staff.
- 11% of respondents rely on outside support.
- 27% of respondents indicated a need for new media support, in terms of both additional staff support and training.

**23. Participating groups have a presence on the following online networks:** (Respondents were encouraged to check all that apply.)

- 81% engage with Facebook.
- 45% engage with Twitter.
- 32% engage with MySpace.
- 13% engage with LinkedIn.
- 5% engage with CommunityConnect (Black Planet, MiGente, Asian Ave, GLEE, Faithbase).
- 16% do not use any social network.
- 18% engage on other networks, such as a custom networks built with Ning.



**24. 97% of participating organizations have a website. 2% would like to have a website but lack the resources to do so.**

**25-28. Participating groups currently use, would like to use, are not familiar with, or are not pursuing the use of the following online tools:**

Tool	Currently Use	Would Like to Use	Not Pursuing	Not Familiar
Click to Call (web based tool to connect an activist to a legislators office via a phone call):	18%	56%	14%	12%
Online Donations:	78%	18%	3%	0%
Events (tool to allow your organization to post events that people can sign up for):	45%	42%	9%	4%
Federal Action Items (advocacy web pages that allow users to send emails/faxes to Federal legislators/committees):	37%	43%	14%	5%
State and Local Action items (advocacy web pages that allow users to send emails or faxes to State legislators/committees or local officials):	37%	50%	8%	6%
Letters to the Editor (allows a user to submit a letter to major media editors):	30%	54%	13%	3%
Personal Fundraising Pages (allows a member to raise money for your organization on a page they create with your tools):	4%	66%	22%	8%
Petitions (online petitions users can sign):	47%	30%	19%	4%
Legislative Scorecards (grades a legislator's vote history in relation to issues):	18%	43%	33%	6%
Signup pages (allows prospective members to sign up with your organization):	69%	23%	4%	3%
Online Store:	19%	28%	45%	7%
Tell a friend/E card (allows users to email friends about an organization or issue):	48%	41%	5%	5%



**29. Many organizations feel they could be doing more to activate their online supporters (via web site or e-mail) into donors, activists, and volunteers.**

- 17% successfully follow up with online supporters to convert them into volunteers or donors.
- 50% feel they could be doing more to activate their online supporters.
- 11% have a strong online presence, but they are typically a different group of people than the organization's volunteers, donors, and activists.
- 16% do not have much of an online presence.
- 6% do not fall into the above categories, for example because they are just launching their online presence.

**30. Participating groups track the following metrics in their e-mail campaigns:** (Respondents were encouraged to check all that apply.)

- 71% track open rates.
- 66% track click-through rates.
- 22% run A/B splits on their e-mails to test subject, sender, or content.
- 10% track other e-mail metrics, such as conversion rates to action.
- 22% do not track metrics for their e-mail campaigns (or do not run e-mail campaigns).

## STAFF AND RESOURCES

**31. Participating groups have the following data management resources:** (Respondents were encouraged to check all that apply.)

- 16% have at least one dedicated data manager.
- 55% have at least one staff member who is proficient in data management but also has other duties.
- 34% get by with the informal knowledge of their staff.
- 13% rely on outside data support, such as a state table or an affiliate.
- 11% report needing data support (citing a need for a dedicated staff person).

**32. When participating organizers are fully “staffed up,” they employ a range of full-time paid organizers.**

- 32% do not have organizers on staff.
- 40% employ less than 5 full-time organizers.
- 19% employ between 5 and 20 full-time organizers.
- 4% employ between 20 and 50 full-time organizers.
- 1% employ between 50 and 100 full-time organizers.
- 4% employ more than 100 full-time organizers.

**33. A majority of participating groups train their organizers or volunteers on VAN.**

- 39% do not use the VAN.
- 16% use the VAN, and have adequate resources for training staff or volunteers in-house.
- 36% partner with an outside organization (such as ISSI) to train their staff or volunteers.
- 9% report a need for additional resources to train their staff or volunteers on VAN.

**34. Many organizations cite additional training needs, particularly in data management and online organizing.**

- "I think we could use more training about using online tools to fundraise and increase the number of supporters who take action."
- "practical ways to use technology for grassroots action, finding people in remote or rural areas and more effectively engaging bloggers"
- "We're always interested in hearing best practices in online organizing, success stories, and what's the next big thing."
- "Would like to develop a more formal training and accountability program for that as well as figure out the best way for staff organizers to use VAN if we have VAN access in 2010. New media training is also needed for all levels of staff."
- "Training needs include using the VAN, education on what technology options are out there, list selection, targeting, and matching our data to the VAN."

**TESTING AND EVALUATION**

**35. Nearly half of participating organizations are likely to conduct a randomized controlled experiment in 2010 with a control group to evaluate the impact of their voter participation strategies.**

- 26% intend to conduct a randomized controlled experiment in 2010.
- 21% will probably conduct a randomized controlled experiment in 2010.
- 40% will not conduct a randomized controlled experiment in 2010.
- 13% are unsure whether they will conduct a randomized controlled experiment in 2010.

**36. Participating groups intend to conduct a variety of experiments, ranging from program evaluation to measuring the effectiveness of particular messages.**

- "We would like to measure impact on turnout, ability to prevent rolloff and persuasiveness. Will be running a canvassing program and would like to set up the experiment with either Nickerson or the Analyst Institute"
- "We are currently doing an experiment with various script types to measure if people tend to take action more if they are told that "1000s of people will be making a call, join them" vs "very few people are making a call and we need your support" vs. control group."
- "We will attempt to identify a statistically significant increase in voting among our supporters who are historically infrequent voters."

**37. Among the 44 groups who are likely to conduct a randomized controlled experiment in 2010, most are partnering with an outside social scientist or organization to design and analyze their test.**

- 9% are designing and analyzing their experiment in-house.
- 27% are partnering with the Analyst Institute.
- 64% are partnering with another social scientist.
- 25% do not fall into the above categories, for example because their partner is to be determined.

**38. The 44 groups who are likely to conduct a randomized controlled experiment in 2010 might release the results of their study publicly.**

- 14% intend to release the results of their study publicly.
- 32% intend to release the results of their study publicly, but to a limited audience.
- 7% do not intend to release the results of their study publicly.
- 34% haven't yet decided whether to release the results of their study publicly.
- 14% do not fall into the above categories, for example because the decision to release the results is dependent on the outcome.

**39. Among the 50 groups who do not intend to conduct a randomized controlled experiment in 2010, a majority (62%) are interested in receiving assistance to learn about whether such tests could be of value to their programs.**

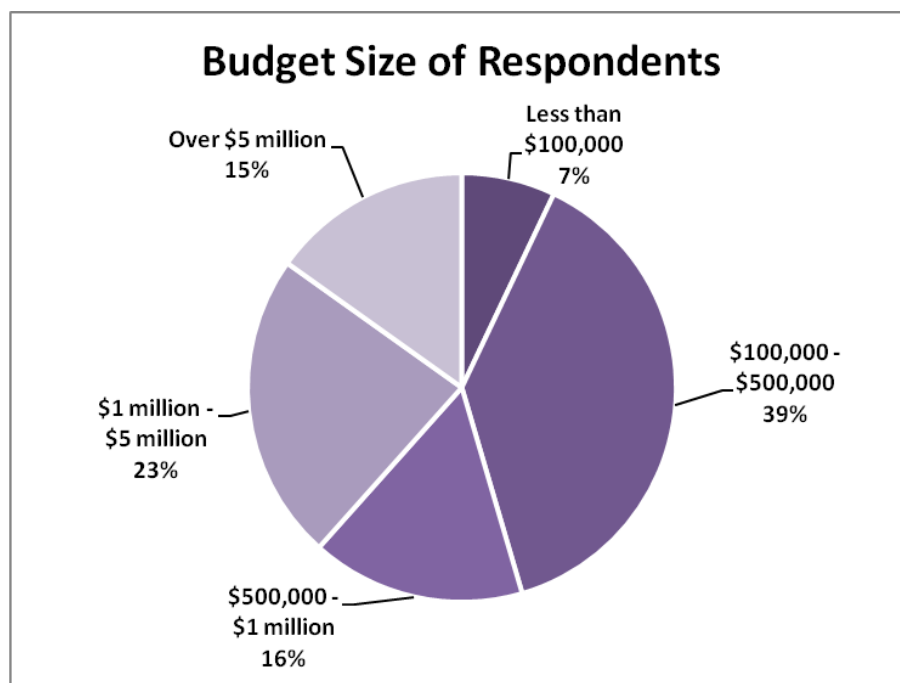
## PARTICIPATING ORGANIZATIONS

**40. 94 organizations completed this voluntary survey.**

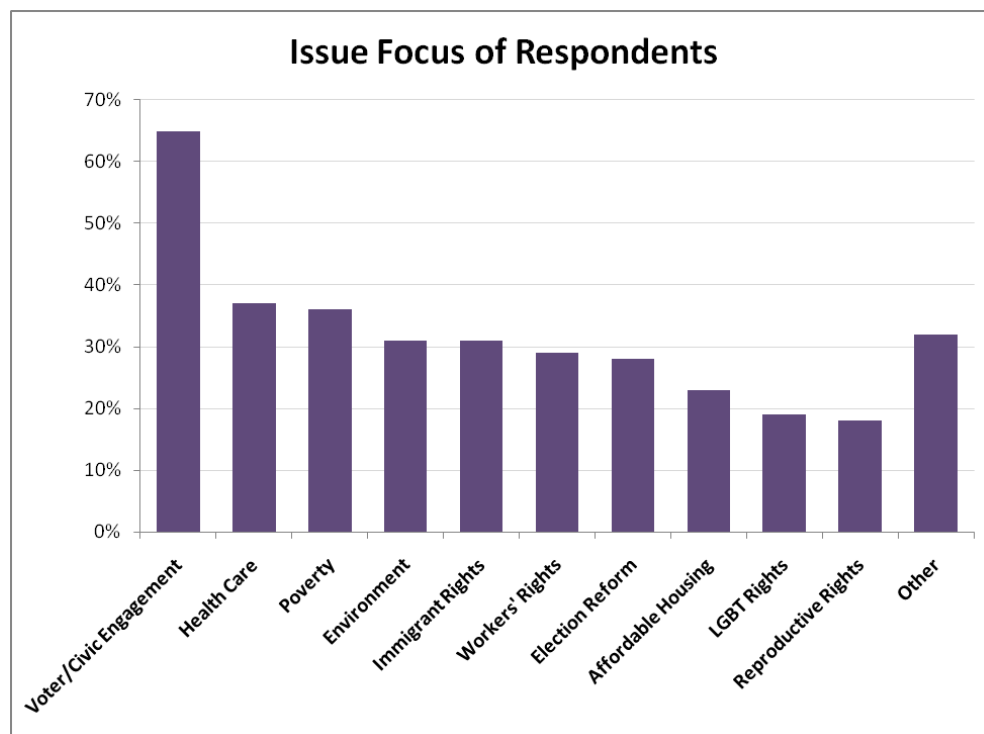
- Organizations that completed the survey are listed in the appendix.
- 54% of participating groups expressed that they would be comfortable if their survey responses were attributed to their organization.

**41-45. A broad sample of organizations completed this survey, in terms of organizational structure, budget, program size, issue focus, and membership composition.**

- Organizational structure:
  - 46% of participating organizations are affiliated with a 501c4 entity.
  - 29% of participating organizations have affiliates or chapters, and 62% of participating organizations are themselves an affiliate of a state, regional, or national network.
  - Both national and state/local organizations were well represented: National organizations comprise of 39% of the respondents, with the rest coming from state or local organizations.
- Budget:
  - 7% of participating organizations have an annual 501c3 budget of less than \$100,000.
  - 38% of participating organizations have an annual 501c3 budget between \$100,000 and \$500,000.
  - 16% of participating organizations have an annual 501c3 budget between \$500,000 and \$1 million.
  - 23% of participating organizations have an annual 501c3 budget between \$1 million and \$5 million.
  - 15% of participating organizations have an annual 501c3 budget over \$5 million.



- **Staffing:**
  - 68% of participating organizations have full-time paid organizers on staff. 10% of participating organizations employ over 20 full-time organizers.
  - 55% of participating organizations have at least one staff member proficient in data management, and 16% of participating organizations employ a dedicated data manager.
  - 46% of participating organizations have at least one staff member proficient in new media and online organizing, and 23% of organizations have at least one dedicated new media staff member.
- **Membership:**
  - 63% of participating organizations have individual members who pay dues or contribute financially.
  - 72% of participating organizations use volunteers.
- **Issue focus — among the organizations who completed the survey (respondents were encouraged to check all that applied):**
  - 65% specifically focus on voter or civic engagement.
  - 48% focus on health care.
  - 37% focus on alleviating poverty.
  - 36% focus on the environment, green jobs, or climate change.
  - 31% focus on immigrant rights.
  - 29% focus on workers' rights.
  - 28% focus on election reform.
  - 23% focus on affordable housing.
  - 19% focus on LGBT rights.
  - 18% focus on reproductive rights.
  - 32% focus on other issues.



### Participating Organizations

9to5, National Association of Working Women  
Association of Community Organizers for Reform Now (ACORN)  
ACORN of Western PA  
Action for Children North Carolina  
Advancement Project  
Advocates for Youth  
Arab Community for Economic & Social Services (ACCESS)  
Arizona Interfaith Network  
Asian Pacific Islander American Vote  
Catholic Coalition on Climate Change  
Center for Civic Policy  
Center for Community Change  
Colorado C3 Roundtable  
Colorado Conservation Voters  
Colorado Immigrant Rights Organization  
Colorado Progressive Coalition  
Community Voices Heard  
Community Reinvestment Association of North Carolina  
Conservation Council of NC Foundation  
CSH/CPIBT/CACTF/SSL  
Democracia USA  
Earth Day Network  
Ecology Center, Inc.  
Economic Opportunity Institute  
El CENTRO de Igualdad y Derechos  
Equality NC Foundation  
Florida 501(c)(3) Civic Engagement Table  
Florida State Conference NAACP  
Front Range Economic Strategy Center  
Grassroots Institute of NJ and NJ Working Families Alliance  
Green For All  
Health Action New Mexico  
Jobs with Justice  
Keystone Progress Education Fund  
Lao Assistance Center of MN  
Latina Initiative  
League of Conservation Voters Education Fund  
League of Women Voters Education Fund  
Maine Women's Policy Center  
Miami Workers Center  
Michigan Citizens Education Fund  
Michigan League of Conservation Voters  
Michigan Unitarian Universalist Social Justice Network  
Michigan Universal Health Care Access Network  
Mississippi Immigrant's Rights Alliance  
Missouri Association for Social Welfare  
Missouri Budget Project  
Missouri Jobs with Justice  
Missouri Votes Conservation/Missouri Votes Conservation Education Fund  
Missourians for Tax Justice  
Mobilize the Immigrant Vote (MIV) California Collaborative

Mobilize.org  
Montana Women Vote  
NARAL NC  
National Coalition on Black Civic Participation  
National Organization for Women  
National Partnership for Women & Families  
National Women's Health Network  
NC Conservation Network  
New Energy Economy  
New Mexico Environmental Law Center  
North Carolina Housing Coalition  
Clean Water Action & Clean Water Fund  
OutFront Minnesota  
PABRC  
People of Faith Against the Death Penalty  
Planned Parenthood Affiliates of Michigan  
Planned Parenthood Federation of America  
Planned Parenthood of the Heartland  
Planned Parenthood of the Rocky Mountains  
Progress Michigan Education  
Project Vote  
Public Interest Network  
Rights for All People  
Restaurant Opportunities Center Michigan  
Rock the Vote  
Services for Independent Living, Columbia  
SouthWest Organizing Project  
St. Louis ACORN  
Strategic Concepts in organizing and Policy Education (SCOPE)  
Sunflower Community Action  
Tennesseans for Fair Taxation  
The Washington Bus Education Fund  
The White House Project  
U.S. Student Association and U.S. Student Association Foundation  
U.S. Student Association Foundation  
Valley Interfaith  
Virginia League of Conservation Voters Education Fund  
Washington Low Income Housing Alliance  
Western States Center  
Wisconsin League of Conservation Voters Institute  
Working America Education Fund  
Women's Voices. Women Vote

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