

# Applying Advocacy Best Practices on the Convio Platform

Robin Anderson, Interactive Specialist, Convio Chris Burley, Director, Online Campaigns, Defenders of Wildlife Sally Heaven, Senior Account Manager, Convio





# **Power Admin - Advocacy**

Robin Anderson Interactive Specialist, Convio November 19, 2008



#### What does Advocacy mean to you?





### **Action Alert**

				search	<b>go</b>
HHA	About Us Home > Action > Advocacy Email the Car		Affiliate Network		onate a 🖂 🗚 A
Information Help	All candidates want you will pay their sa nation's mental hea	to earn your vote. I alaries. We must let o Ith and wellness will	our leaders know that w be on our minds.	you will be their boss, and as hen we step into the ballot t	
Action e Action Now scribe	2. Review the	e form below with yo message on the rig ed and write your ov end Your Message" bu	ur information. ht and make any chang vn message. itton to send your letter.	es. If you prefer, you may o	lelete the
cy Issues A-Z ate e	* = Required Fields	5	Send This Message	<b>`</b>	
re your story nt Calendar cy Alert Archive ition Statements	* Title:		Subject: Mental Health Matter Dear [Decision Maker Please personalize your	], message	
	* Last Name:		pressing issues faci to see you address i platform. About one in four Am	Ith is one of the most ng our country and want t in your health care merican adults over 55	
	Address 2: * City:		Each year, more than are lost to suicide. severe mental illnes years earlier than t One in two service m Iraq and Afghanistam	with a diagnosable stance abuse condition. 130,000 American lives Those with the most ses die, on average, 25 the general population. embers returning from a are reporting mental e cost to our economy of	
	* State / Province Choose a State v		these and related pr billion annually	oblems is more than \$100 and rising.	
	* ZIP / Postal Cod	e:	health. And even Me beneficiaries to pay	ers to care for mental	
	* Your Email:	e to receive periodic	it must include ment means making prevent of illnesses routine	health care reform. But age real and effective, al health care. That ion and early detection e, eliminating ers to treatment, and	
	updates and comm Mental Health Ame	unications from rica.	Sincerely,		9
	Remember me. I would prefer n personal information America.		[Your Address] [City, State ZIP]		
	Nex	t Step			

© 2008 Convio, Inc.

THIRD ANNUAL Convio Summit

November 17 - 19 2008

### **Advocacy Tools You Can Use**

- Action Alerts
- Call Alerts
- Vote Center
- Legislative Scorecards
- Legislative Locator



#### Other tools you can use to build your arsenal

- Pagebuilder / Landing pages
- Email
- Tell A Friend / Forward to a Friend
- E-cards
- Survey
- Donation campaigns



## Setting up an Advocacy Campaign

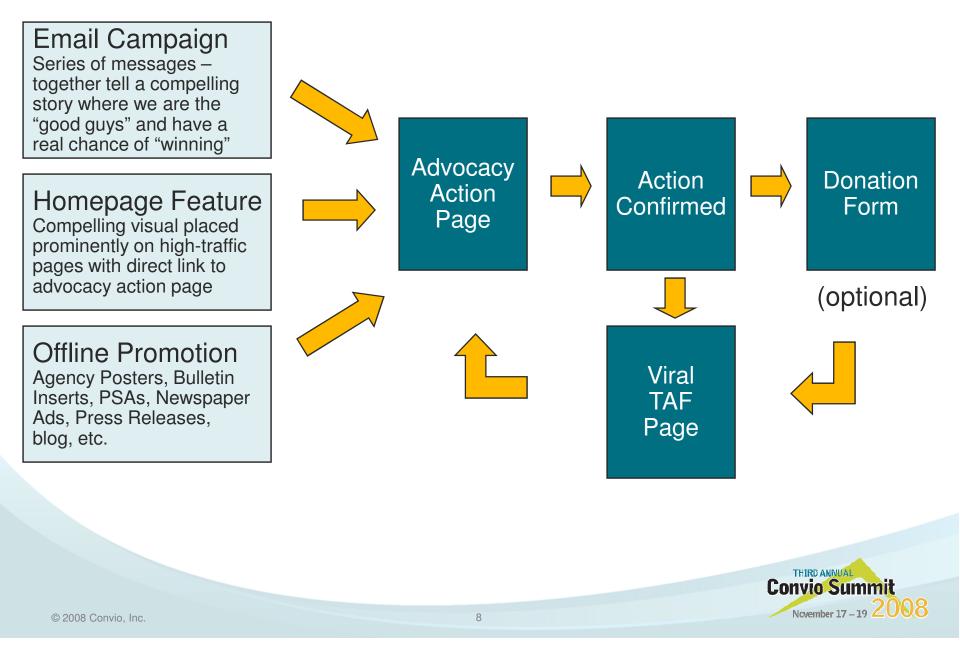
Organize an email campaign

Make it easy for constituents to take action

- Communicate the progress of the campaign good or bad
- Close the loop! Follow up with results and thank yous



# **Advocacy Campaign Structure**



#### Advocacy Example: "Mental Health America"

#### **Email Promo**



Advocacy Action Page



#### Action Tell a friend about this page Link being sent: http://takeaction.mentalhealthamerica.n site/PageServer?pagename=elections\_campaigr First Name: Last Name: Your Email Yes, sign me up to receive breaking news and take action alerts from Mental Health America's Advocacy Network. \* Send to: Enter multiple addresses (up to five) on separate lines or separate them with commas. With commas. (Note: We respect your privacy, addresses you enter below will be added to your Address Book, but will not be used by the organization. For further on, see our <u>Privacy Policy</u>.) Cast your vote for mental health in '08 Subject: Body: Dear Friend. Be sure to cast your vote this November for the candidates who v protect and provide for the mental health and well being of ALL Send Reset

Advocacy Confirmed/TAF

Advocacy action page should have all the information constituents need to know to take action.

9



© 2008 Convio, Inc.

real

Share Your Story. Millions will benefit.

# **Tell A Friend – Action Alert**

#### Advocacy

	Process Navigator	👬 * 1.	. Configure Thank You Page Display Options
1.	Identify Alert		After the constituent takes action on your alert, you can show them a Tell-a-Friend page, a Thank
2.	Advanced Options		page.
3.	Alert Message		<ul> <li>Thank You Page Without Tell-a-Friend.</li> <li>No Thank You Page, redirect to this URL.</li> </ul>
4.	Include Questions	_	<ul> <li>No many rou Page, redirect to this ORL.</li> <li>Thank You Page With Tell-a-Friend and Standard Tell-a-Friend Confirmation Page.</li> </ul>
5.	Select Targets		O Thank You Page With Tell-a-Friend, Redirect to this URL.
6.	Configure Autoresponder	*	Instructions:
7.	Thank You Page Options		Enter instructions that will be shown to constituents regarding the Tell-a-Friend message.
8.	Configure Pages		Please help us spread the word about this issue - type your friends' email addresses into the box below and we will
9.	Preview Alert		forward this alert to them on your behalf. Together we can
10	). Publish Alert		make a difference!
		*	Message Subject:
			Enter the subject for the Tell-a-Friend message.
			Make Your Voice Heard!
		*	Message Body:
			Enter the body text for the Tell-a-Friend message.

# **Tell-A-Friend - Pagebuilder**

and the second second	About Us	Press Room Affiliate Network Store Donate	
1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1	Home > Action > Advoc	cy Network	
	Tell a friend a * = Required Fie	oout this page	
nformation		us t: http://takeaction.mentalhealthamerica.net	
elp	Link being ser	/site/PageServer?pagename=elections_campaign	
ction	Your Name:	First Name: Last Name:	
Action Now cribe	* Your Email:		
y Issues A-Z te		Yes, sign me up to receive breaking news and take action alerts from	
e your story t Calendar	* Send to:	Mental Health America's Advocacy Network. Enter multiple addresses (up to five) on separate lines or separate them with commas.	
y Alert Archive ion Statements		(Note: We respect your privacy, addresses you enter below will be added to your Address Book, but will not be used by the organization. For further information, see our <u>Privacy Policy</u> .)	
	Subject: Body:	Cast your vote for mental health in '08	
	body.	Be sure to cast your vote this November for the candidates who will	
		protect and provide for the mental health and well being of ALL Americans. Learn more here: http://takeaction.mentalhealthamerica.net /vote2008.	
	Send Re:	et	

#### **How to Customize Tell A Friend**

Sonv	/10°					
<u>C</u> ontent	F <u>u</u> ndraising	Advocacy	E <u>m</u> ail	Constituent <u>3</u> 60	<u>L</u> ibrary	Data Ma <u>n</u> agemer
PageBuil	der					
PageBuilde	r PageBuilder R	eports Gene	ral Configuration	ons		
Page Library >	сс					
Ст	reate New Version	E	dit Page Attr	ibutes Crea	ate a Custom	Tell-A-Friend

The Page Version List displays versions created for this Page. To create a new version, use the Create New Version bu content and properties of the copied version. Use the Edit Content action to update the content for that version. Use the version. You must have an Active, or Published, Version of the Page to be able to link to or display the Page on your si the top of the page to change information that is specific to the overall page, such as security category or page wrapper

- Page Version List -			
Records 1 - 1 of 1 First   Previous   Ne	xt   Last		
	Search Show All		
Version	⊖ ♦ Actions	😑 Status	😑 💠 Created
v1Administrator07/24/2008	Preview Edit Content Edit Version Attributes Accessibility Unpublish Copy Version	Active	07/24/2008 10 by Ms. Syster

Records 1 - 1 of 1 First | Previous | Next | Last

Click here to view introduction



# **Customizing Tell A Friend**

- Space limitations
- Does not allow any other customizations, like images or html
- Not trackable



#### Forward to a Friend

- Forward to a Friend refers to emails
- Example of link for Forward to a Friend:
  - http://takeaction.mentalhealthamerica.net/site/TellAFriend?msgld=7341.0
- The message id is the "em\_id".
  - Example: em\_id=7341.0 then 7341.0 is the number you will need to use for the Forward to A Friend.
- You can use this link anywhere on the site as well if you'd like visitors to forward a particular email message.



# Finding the email id

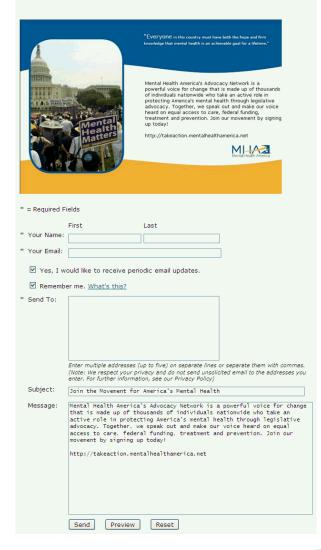
Email

	Create a ne	w messa	iqe		
Related Actions					
Edit this campaign	Draft Messages			Email Campaign Summary	
Send a message Setup a Recurring Delivery Run an A/B Test	The messages listed below are currently being worked on. Click the edit link to continue working on the selected message.			This report reflects totals or averages acro These statistics are recalculated daily.	
	Message Name	Actions	Last Modified		
	Solicit Email	Edit	Sep 30, 2008 2:28:55 PM	Email Campaign Trend This report reflects average performance a	
				each of the last 3 months. These statistics	
	Approved Messages The messages listed below have been approved and are ready to send but have not yet been scheduled for delivery. Click the send link to send the message now or schedule a future delivery.			10% -	
				8%	
				6%	
				4%	
				2%	
				0%	
				Open Rate	

#### **Ecards**

#### Send a Message of Hope and Action!

Send a free e-card to tell others about Mental Health America's Advocacy Network.





## **Ecard Campaigns**

- Visually appealing
- Able to track
  - But consider the size of your audience
- More time-consuming
  - Set-up
  - Graphics / Stationery



#### Lastly – a few tips...

- Maintain ongoing advocacy opportunities
  - Link to an Action Center in a welcome or conversion series
  - Provide banners or logos for personal webpages
    Have visitors to your site sign a pledge of support or
  - Have visitors to your site sign a pledge of support or commitment
- Make it personal use personal stories and personalization when communicating with constituents.
- Empower constituents with interactive tools on your website (RSS feeds, blogs, etc.).
- Utilize social networking to get the word out about your cause. (Facebook for example).





#### Use Advocacy in conjunction with other modules and tools to emphasize the importance of your cause and motivate people to get involved.



#### **Appendix – other examples**



© 2008 Convio, Inc.

THIRD ANNUAL Convio Summit

November 17 – 19 2008

#### Homepage



© 2008 Convio, Inc.

November 17 – 19 2008

#### **Vote Center**

ntal Health Americ	2. ca	Act	ion
		2	earch 😡
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	About Us	Press Room Affiliate Network Store	Donate
	Home > Action > Advo	acy Network	🗏 🖂 🗚
HHM	Mental Healt	h Legislation - 110th Congress	
Information	Bill No.	Title (click link for summary below)	Our Position
Help	H.R. 1424	Paul Wellstone Mental Health and Addiction Equity Act of 2007	Support House passage
Action	<u>S. 558</u>	Mental Health Parity Act of 2007	Support Senat
ake Action Now	S. 38	Veteran's Mental Health Outreach and Access Act	Support
ake Action Now ubscribe	H.R. 1663	Medicare Mental Health Modernization Act of 2007	Support
olicy Issues A-Z onate	H.R. 1571	Seniors Access to Mental Health Act of 2007	Support
tore	S. 382/ H.R. 687	Keeping Families Together Act	Support
hare your story vent Calendar	<u>S. 1337</u>	Children's Mental Health Parity Act	Support
olicy Alert Archive	<u>5. 1224</u>	Children's Health Insurance Program (CHIP) Reauthorization Act	Support
osition Statements	S. 895/H.R. 1535		Support
	H.R. 2073	Child Health Care Crisis Relief Act	
	S.1332		Support
		Mental Health in Schools Act of 2007	Support
	<u>S. 891</u>	Parental Consent Act	Oppose
	H.R. 2387	Universal Screening	Oppose
	<u>H.R. 297</u> H.R. 2050	NICS Improvement Act of 2007 Medicaid Emergency Psychiatric Care Act of 2007	Have Concerns
	Requires employe benefits to ensu addiction benefit medical/surgical the Federal Empl	Mental Health and Addiction Equity Act of 2007 (H.R. 1424) srs (with more than 50 employees) who offer health plans that have re that treatment limits and financial requirements applicable to me s are no more restrictive than the limitations/requirements on subs benefits. Those plans must cover those behavioral health disorders oyee Health Benefits plan option having the highest enrollment.	ntal health and tantially all
	Requires employe benefits to ensu	Parity Act of 2007 ( <u>S. 558</u> ) rs (with more than 50 employees) who offer health plans that have re that treatment limits and financial requirements applicable to mee s are no more restrictive than the limitations/requirements on subs benefits.	ntal health and
	Requires the Vet and mental healt veterans at risk Specifically, the peer-outreach se readjust and rec for employment a remote from VA care in much gre mental health an	al Health Outreach and Access Act (5_38) erans Administration (VA) to establish a program to provide readjust heavices to, and would eliminate critical barriers that now put ma of having their readjustment or mental health problems worsen and bill would (1) combat the stigma that deters help-seeking by ma ervices a core VA responsibility in helping veterans of service in Irai over; (2) require VA to establish a national program for training ret as peer specialists; (3) provide VA a mechanism through which vet nealth facilities could get peer-supported readjustment counseling a ter proximity to their homes; (4) enable immediate family members d other services to assist in the veteran's readjustment or recover years the special health-care eligibility period for veterans who ser	ny returning become chronic. Iking q and Afghanistar urning veterans erans living and mental health s to receive y; and (5) extend

THIRD ANNUAL Convio Summit November 17 – 19 2008

# Applying Advocacy Best Practices on Convio

Convio Customer Summit—November 2008





#### **About Defenders**

- Defenders of Wildlife works to protect imperiled wildlife and habitat in North America and around the world
- 9-person Online Marketing & Communications Department manages all emails, websites, online activity
- Membership and email stats
  - ~530,000 members (donors)—majority from direct mail

~160,000 of these have valid email (30%)

~800,000 e-supporters (including members)



# **Advocacy Campaign Steps**

- 1. Campaign Planning
- 2. Education
- 3. Advocacy
  - Engagement and Integration
- 4. Reporting





# Case Study: Aerial Hunting of Wolves

Objective: To build support in Congress and among the public for the Protect America's Wildlife (PAW) Act to end aerial hunting of wolves and bears in Alaska







# **Step 1. Campaign Planning**



#### **Objectives: What do you Want to Accomplish?**

- Impact public or corporate policy
- Raise awareness/educate about the issue
- Generate earned media
- Other





# **Targets: Who can Make this Happen?**

Convio supports...

- Federal and State Lawmakers
  - Committees
- Governors and Other State Officials
- Presidential Campaigns Federal Cabinet Members
- Custom Targets

Does the target have a constituency that would make a better messenger than your supporters? If so, ask them.

Possible alternate targets:

- Media
- Tourism Boards / Chamber of Commerce
- Other organizations



### **Best Practices**

#### **Message Delivery**

When possible, confirm preferred delivery method with the target Use Convio conditionals to ensure delivery for offices using

CAPTCHA and other gating technologies If public email is not available, ask for a special delivery address or physical delivery

- Avoid faxes; They are wasteful and annoying to most targets
- Only use mail when you have plenty of time for delivery



# **Timing: When is your Best Opportunity?**

#### **Decision Moments**

- Pre-Introduction (Education)
- Introduction (Momentum)
- Committee Vote (Passage)
- ► Final Vote (Passage)

#### **Non-Decision Moments**

- Media Stories
- Holidays
- Collaborations with Other Groups



# **Tools: What Tools will you Use?**

- Call Alerts Good for immediate direct action
- Advocacy Alerts Good for direct action

#### **Other Helpful Modules**

- Surveys Good for offline advocacy, identifying grasstops, polling members for offline messaging
- E-cards & Tell-A-Friends Good for taking your message beyond your list
- Donations
- Pagebuilder/Storybuilder, etc.



# **Planning - AK Wolves**

- Objective: Build public and Congressional Support for the PAW Act
- Timing: Summer '07 Launch
- Tools: Email, Action Alerts, Call Alerts, In-District Meetings, Paid Media Earned Media, etc.





## **Step 2. Education**

- **Tell the story.** For any ongoing campaign, you need your supporters to feel a sense of knowledge and ownership. The problem must be easily explained and relatable.
- Tactic: Leverage compelling assets in emails and other channels
- Story Bank (Survey, Storybuilder)
- 3rd Party Verification (editorials, expert signers, etc.)
- Video
- Scorecards, white papers and reports with discreet, relatable data
- Be creative!

#### Integrate

- Fundraising
- Earned Media



## **AK Wolves: Education Phase**

#### Publicized videos

- 296K views to date
- Called on AK Gov. to end aerial hunting
  - ~31K emails; 2K calls
- Encouraged introduction of federal legislation to end aerial hunting of wolves
  - 72K+ actions preintroduction

We've produced <u>two new videos on Alaska's aerial hunting program</u>. Please help share them with the world -- Forward the message below to at least 5 friends and help us expose the Alaska wolf massacre.



Dear Wildlife Supporter,

#### When people think of Alaska, they think of its amazing wildlife and natural beauty. But Alaska has a terrible secret: Each year, the state permits private citizens to chase down and kill dozens of wolves using low-flying aircraft and high-powered rifles.

Alaska Governor Sarah Palin and anti-wolf officials in the state have worked hard to obscure the truth about the aerial gunning program, even going so far as to earmark \$400,000 in state funds to "educate" Alaskans about the state's baseless aerial gunning program.

<u>Help us expose Alaska's secret slaughter. Watch Defenders'</u> <u>new video online right now and urge Governor Palin to end</u> <u>aerial gunning of wolves.</u>

Warning: This video contains disturbing footage of aerial wolf hunts -wolves shot down from above, chased to exhaustion and wounded and left to die. If you would prefer to take action without watching the video, <u>please click here</u>.

These are awful images, made all the more so by how senseless the aerial gunning programs are. Under the guise of "wolf management," state officials set arbitrary goals for the number of wolves to be killed



Aerial hunting of wolves is Alaska's dirty secret. <u>Watch our</u> <u>new video and take action to</u> help end this brutal practice.

Watch the Video

Aerial Hunting by the Numbers



# **Step 3. Advocacy**

**Direct Action** 

- Email/Fax (Advocacy Alert)
- Phone (Call Alerts/Surveys)
- Storybanks with Offline Delivery (Survey)
- Letter to the Editor Campaigns (Pagebuilder/Survery)

Offline Advocacy

- Rallies
- Meet-Ups/Letter Writing Campaigns
- Media Call-ins





#### **Best Practices – Action Alerts**

#### Email text to supporters

- Make it urgent
- Focus on how the policy impacts things your supporters care about, not policy arcana
- Identify action targets in the message copy and why you want supporters to contact them



#### **Best Practices – Action Alerts**

Message to Decision Makers

- Use the Topic Code in Convio to help Congressional staffers sort messages
- Identify your organization in the email text
- Be specific. Directly reference bill numbers, reports, etc. and what is expected of the decision maker
- Encourage personalization by supporters and give guidance on how to do so...



#### **Best Practices – Calls**

- Time appropriately
- Provide a script AND links to more information so your supporters feel prepared
- Provide links for alternate actions. Some people are shy!



## **AK Wolves: Advocacy Phase**

- Urged Co-Sponsorship of PAW Act to end Aerial Gunning
  - ► ~60K emails
  - ~9K calls
  - ~16K thank-you messages
- Recruited for In-District Meetings
  - Helped generate 82 indistrict meetings for PAW Act in 26 states, with nearly 1,800 online activists volunteering to meet with their elected officials in person

or Wolves...



Dear Wildlife Supporter,

My home state of Alaska has some of the most intact wild places and abundant wildlife in America -- but the Last Frontier is also home to a brutal reality: aerial hunting of wolves.

On Tuesday, Rep. George Miller (CA) introduced vital wildlife-saving legislation that could finally end Alaska's brutal aerial hunting program. But he needs the support of your elected official to pass it.

You can help Congressman Miller and Alaskans like me to put an end to this horrific program once and for all -- and prevent programs like it from spreading to the Lower 48 States.

Write your Representative today! Tell him or her to become a cosponsor of the Protecting America's Wildlife (PAW) Act -vital legislation that will end Alaska's brutal aerial hunting of wolves and stop similar programs in other states.

As summer ends, another deadly season of aerial hunting looms on the horizon in Alaska. Now, states like Wyoming and Idaho are planning to use this savage practice to slaughter wolves within their own borders.

That's why we're turning the national spotlight on this unnecessary and savage practice -- to end Alaska's aerial hunting program and stop it from spreading elsewhere.

-----



Tell your Representative to become a cosponsor of the PAW Act today!







# **AK Wolves: Engagement and Integration**

#### Integrate with other departments to facilitate...

- Engagement (Vote on Ads etc.) – Ad vote generated ~24K votes
- Fundraising Raised more \$200K to support this effort in FY07
- Earned Media



#### Dear Chris,

Earlier this week, I asked you to help pick Defenders of Wildlife's next ad spotlighting the terrible truth about aerial wolf hunting. More than 22,000 Defenders supporters voted, and an overwhelming 76% chose this ad:



Will you help us run this powerful ad? <u>Donate \$25.00</u>, <u>\$50.00</u>, <u>\$100.00</u>, or <u>another amount</u> within the next 48 hours to support the next vital steps in our campaign to end end this barbaric practice.

#### DONATENOW >

With your support, we'll run this ad during the last week of January. It will be placed in the **Washington Post's** widely read **Express**, ensuring that Members of Congress, their staffs and nearly 286,000 DC residents and tourists know the awful truth about aerial hunting of wolves.

This is just the beginning. Over the next six weeks, we'll be meeting with dozens of Congressional offices in support of the Protect America's Wildlife (PAW) Act, federal legislation to end aerial hunting of wolves.



## Step 4. Report

## Make sure that your supporters know the impact that they are having

129 House Co-Sponsors Elevated issue profile to discussion in presidential campaign



#### Dear Chris.

#### PAW Progress Report

Because you are such an important part of our work, today I want to thank you and give you some insight into how your actions and donations are helping to pass the Protect America's Wildlife (PAW) Act and end brutal and unnecessary aerial killing of wolves.

In just a short time, 111 Members of Congress have joined our fight to stop this brutal practice, with 16 Representatives signing on to cosponsor the PAW Act in just the last two weeks.

This is an amazing accomplishment, and it's only possible because of dedicated wildlife lovers like you. Since launching this campaign last summer, supporters of Defenders of Wildlife and Defenders of Wildlife Action Fund have ...

- Sent more than 118,000 messages to Congress;
- Made more 20.000 phone calls to Congressional offices in Washington, DC and across the country; and
- Participated in 83 in-person meetings with Congressional district offices across the country.

The nearly 2.800 individual contributions we received in January to help support this campaign have made an enormous difference, too. Thanks to your generous donations, our team has been able to put the issue of aerial gunning front-and-center in offices around Capitol Hill



Needed: 218

We're making great progress in our fight to end needless aerial killing of wolves!

Visit Our Website

Current: 111

- Learn More About Wolves
- SaveWolves.org



#### Discussion

What are some new ways your non-profit can use Convio's advocacy tools?

