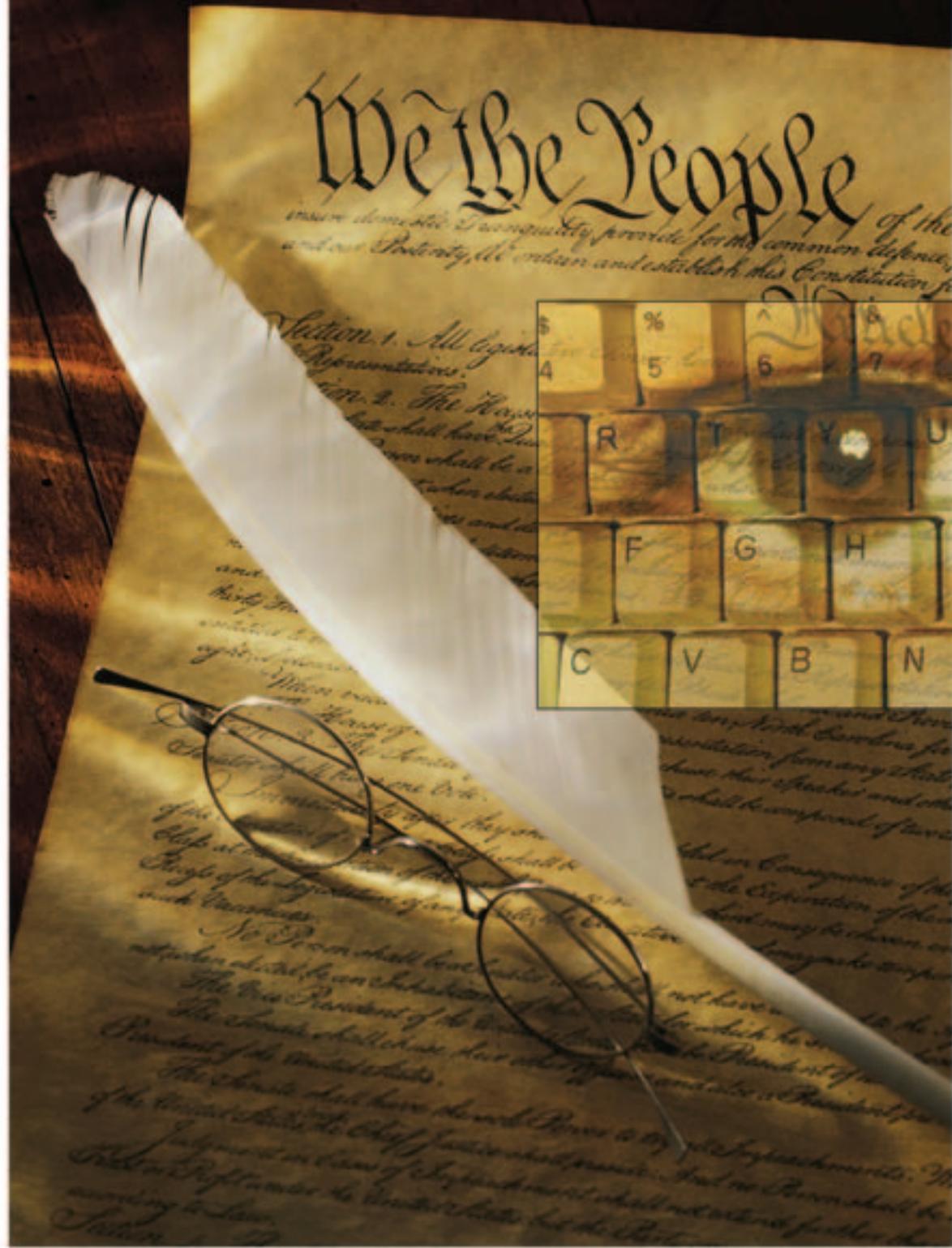


# THE POLITICAL CONSULTANTS' ONLINE FUNDRAISING PRIMER



2004



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Our collaborators are: R. Rebecca Donatelli (Chairman, Hockaday Donatelli Campaign Solutions), Brett Feinstein (Partner, Pound Feinstein), Max Fose (Partner, Integrated Web Strategy), William Greene, Ph.D (President, Strategic Internet Campaign Management, Inc.), Emilienne M. Ireland (President, Campaign Advantage), Karen Jagoda (Founder and President of E-Voter Institute), Daniel Manatt (Principal, Manatt.net/Web Video for Politics), Phil Tajitsu Nash, Esq. (Co-Founder and CEO of Campaign Advantage), Phil Noble (Founder, Politics Online), Lawrence J. Purpuro (Founder, Rightclick Strategies), Ari Rabin-Havt (Creator, Click Back America), Jonah Seiger (Founding Partner, ConnectionsMedia) and Marie Woolf (Principal and Creative Director, Woolf Media). We are grateful for their inspiration, their wisdom and their uncommon generosity in sharing their professional knowledge with us and with each other.

Julie Barko, IPDI Deputy Director, and Kevin Wells, IPDI Research Assistant, compiled, composed and edited this primer, based on interviews with these experts, several of whom provided chapters or drafts of chapters. We welcome your comments or inquiries at [barko@ipdi.org](mailto:barko@ipdi.org) or [kwells@gwu.edu](mailto:kwells@gwu.edu).

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## INTRODUCTION BRINGING OFFLINE FUNDRAISING ONLINE

*Contributed by Julie A. Barko, Marie Woolf and Brett Feinstein*

*By introducing an alternative model for raising money that is quick, cheap and easy, the Internet has increased the pool of small donors and holds the promise of lessening candidates' reliance on large contributors.*

The online success of the 2004 presidential candidates has spurred a revolution in Internet-based fundraising. By introducing an alternative model for raising money that is quick, cheap and easy, the Internet has increased the pool of small donors and holds the promise of lessening candidates' reliance on large contributors.

During the presidential primaries, several candidates attracted an unprecedented number of small donations—i.e., those under \$200—over the Internet, many from new donors. As a consequence, several of them garnered media attention and harnessed a formidable base of constituent support that they could not have afforded to cultivate by traditional, offline means. By February, one Democratic candidate, Howard Dean, raised an unprecedented \$30 million in small contributions, \$20 million of it over the Internet. During that same period, the Bush-Cheney '04 campaign raised \$26 million in small contributions and approximately \$4.2 million online out of a total of \$180 million. Even with this unprecedented success, the popularity of the Internet as a fundraising tool moved so fast that fundraising records were broken in each successive month. By the end of June, Senator Kerry had raised \$182 million, including \$56 million raised online, \$3 million of it in a single day.

According to Zephyr Teachout, Director of Organizing and Outreach at Dean for America, when campaigns use the Internet to amplify a candidate's issues, individuals can receive the particular messages that mean the most to them. And many of them will respond through contributions.

Speaking at a panel discussion by the Campaign Finance Institute on Money and Politics in the 2004 Primaries, she said, "As supporters begin to feel engaged in a campaign, and as donors begin to feel that they own a stake in an organization or an issue, they are likely to give more frequently and in greater amounts." She called the Internet an "intimate medium" that allows campaigns to develop "paced" relationships with potential donors and supporters.

The purpose of this *Internet Consultant's Online Fundraising Primer* is to show you how to use these techniques in your campaign. Although the field of online fundraising is still relatively new, we have assembled the best minds in the industry and translated their experiences into easy-to-follow lessons that will turn online fundraising newbies into seasoned pros.

Let's get started!

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## WHO IS ONLINE?

**For most of the last decade, the Internet has been portrayed as a tool of the young. But this is a demographic that professional fundraisers typically do not target with fundraising appeals. Has the online world changed? Who uses the Internet now? What do they look like?**

Over the course of the last decade, the number of Americans connected to the Internet has steadily climbed and now stands at approximately 63 percent,<sup>1</sup> with about 20 percent linked through a broadband connection at home. About two-thirds of the urban and suburban populations and about half of the rural population are online, according to a February 2004 study by the Pew Internet & American Life Project.<sup>2</sup>

Internet users are just as likely to be male as they are female. Most Internet users are under the age of 55, though Internet penetration is slowly growing among older populations. About two-thirds of Internet users earn more than \$30,000 a year. They are slightly more likely to be married than they are to be single or divorced. All racial and ethnic groups are represented, with whites being slightly over-represented and other groups being under-represented.<sup>3</sup>

As Internet penetration increases, the online population will begin to look more and more like the offline population, with one particularly important distinction. Internet users tend to be more interested in news and politics than Americans in general and thus a particularly attractive audience for political candidates.

During the 2004 presidential primaries, the Institute for Politics, Democracy & the Internet studied the people involved in the presidential campaign through the Internet. We found that they were disproportionately male, highly educated and had higher than average incomes. These people, whom we called Online Political Citizens (OPCs) used the Internet to donate money and time to their chosen presidential primary candidates. They visited campaign Web sites, donated money online, forwarded campaign e-mail and contributed to online discussion groups and Web logs.

These OPCs, we found, are actively involved in local political and civic organizations. They network with other activists, act as opinion leaders in their communities and are disproportionately influential among their friends and colleagues. We estimate that about seven percent of the American population belongs to this group.

Engaging OPCs in your fundraising campaign is a great way to take advantage not only of these dedicated, involved and influential individuals, but also of their networks of family, friends and colleagues.

Figure 1. Demographic comparison of Online Political Citizens to Internet users and the U.S. population

	U.S. Census %	Internet Users %	Online Political Citizens %
Male	49	50	62
Female	51	50	38
18-24	10	17	16
25-34	14	24	20
35-54	29	44	45
55-64	9	9	14
65 and up	12	4	6
Less than \$30,000	28	18	17
\$30,000-\$49,000	21	23	19
\$50,000-\$75,000	14	18	22
More than \$75,000	18	26	42
Less than high school	14	5	2
High school graduates	35	23	4
Some college	25	34	35
Four-year degree	26	37	59
Single	28	24	34
Married	54	52	55
Divorced, separated or widowed	18	23	11
White	81	82	86
Black	13	9	3
Asian/Pacific Islander	4	2	1
All others	2	5	3

Sources: U.S. Census data, 2002 estimates. Pew Internet & American Life Project Tracking Survey, March to May 2002. Nielson//NetRatings online survey December 2003. Some columns do not total 100 percent because some respondents declined to answer.

### Who donates online?

The Institute's research for a 2004 study, *Political Influentials Online in the 2004 Presidential Campaign*, shows that in December of 2003 around 10 percent of the Internet public donated to a presidential campaign.<sup>4</sup> Seventeen percent of those donations were made online.

In a similar report pre-dating our 2004 study and covering a broader range of issues, the Pew Research Center for The People & the Press and the Pew Internet & American Life Project found that about seven percent of Internet users participated in Internet campaign activities that included donating online.<sup>5</sup>

In contrast, Online Political Citizens—the active online participants in the 2004 presidential election—were four times more likely than the general public to donate money to political candidates and organizations. By the beginning of the primaries, approximately 46 percent of them had donated to a candidate or political organization. A quarter of them made their donations online.

Our points are these: While only about two percent of the general public and seven percent of Internet users make political contributions online, the Institute's *Political Influentials Online* study showed that the people who are interested in politics and actively participate through the Internet have a considerably higher rate of contributing online—about 24 percent. These individuals tend to be news junkies and political junkies. Not only do they contribute, but they actively spread the word about candidates and causes they support. That is why connecting with these people is so important and why soliciting them for contributions is likely to be fruitful. They are a valuable fundraising resource.

*The people who are interested in politics and actively participate through the Internet have a considerably higher rate of contributing online—about 24 percent.*

## THE SUCCESSFUL ONLINE FUNDRAISING CAMPAIGN

### Who has successfully fundraised online?

If the 2004 presidential campaigns are any indication, online fundraising will grow as an effective tool to cultivate donations to your candidate, campaign or cause. It is by far one of the most cost-effective fundraising tools. The online fundraising successes of former Governor Dean, Senator Kerry and President Bush illustrate this, as does the success of a lesser-known candidate, Dennis Kucinich:

- The campaign of former Vermont Governor Howard Dean raised about 50 percent of its \$41 million through the Internet, propelling him, as well as several members of his campaign team, into positions of prominence in the media. The entire cost—including salaries—of Dean's Internet campaign totaled about \$1 million, which means it raised about a dollar for every nickel spent on fundraising.<sup>6</sup>
- Josh Ross, director of Internet strategy for the John Kerry for President campaign, estimates that the cost of Internet fundraising amounts to only three cents of every dollar raised.<sup>7</sup>
- Bush-Cheney '04, by comparison, does not rely as heavily on the Internet as a primary fundraising tool,<sup>8</sup> but it has nevertheless been very successful in raising money online. Through the end of May 2004, the Bush campaign raised \$7.6 million dollars using the Internet—\$1.6 million in the month of March alone.
- Dennis Kucinich raised an astonishing 68 percent of his \$6 million dollars in small contributions, most of them online.

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**What sort of successes have people other than President Bush, Senator Kerry and Howard Dean experienced with online fundraising? Can smaller organizations fundraise online just as effectively?**

In the past few years, hundreds of campaigns and organizations have used the Internet to raise funds and garner support for a variety of candidates and causes. Their stories demonstrate how some of the online fundraising tools similar to those adapted by the 2004 Presidential campaigns have been used in a variety of situations:

- In early January, 2004, days after an earthquake left many Iranians without families or homes, the National Iranian American Council (<http://www.nia-council.org>) launched a viral marketing campaign that directed recipients to their Web site, where photos and background about the earthquake were prominently displayed alongside a set of simple, numbered steps people could take to contribute to a fund for earthquake victims. The campaign raised \$105,000 in four weeks.
- During the Halloween season of 2003, Mothers Against Drunk Driving (<http://www.madd.com/home/>) launched an online petition to draw public attention to the fatalities of drunk driving and raise money for its organization. MADD created a series of e-mail messages that allowed its supporters to track the process of the petition on its Web site. The organization gained 10,500 new supporters and raised a total of \$66,900 through the month of October.<sup>9</sup>
- The Republican National Committee's Team Leader program (<http://www.gopteamleader.com/>), designed to share information and raise funds for President Bush, has educated its leaders online through materials and updates to assist them in recruiting new donors and supporters. The program helped the Bush campaign create an e-mail list totaling 6 million individuals in 2003 and raise millions of dollars in contributions.

All of these examples demonstrate one of the keys to Internet fundraising: the greatest strides occur when the online and offline combine to enhance and support each other, thereby strengthening the appeal. E-mail appeals, donor cultivation and online branding all play a large role in this process.

## **ONLINE AND OFFLINE**

**I'm ready to launch an online fundraising campaign. How does online fundraising differ from the typical activities that my campaign has been doing in the world of *offline* fundraising?**

One of the most compelling differences between online and offline fundraising is cost. Pieces of direct mail—postcards, letters and newsletters that your campaign sends its constituents—typically cost between 40-60 cents a letter. Higher volumes of mail of course decrease the per-unit cost.

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E-mail lists, on the other hand, require an initial investment of time and money to build and develop, but the costs of sending a mass e-mail are negligible, and the average contribution is far greater. Online contributions on average are about three times as large as the average direct mail contributions. The typical direct mail contribution is about \$35 and coincides with the lowest denominator requested in your appeal. This is a considerably lower amount than the average e-mail donation, which is over \$100.

Another difference is that, unlike direct mail, e-mail is easily forward-able. Forwarded e-mail is similar to word-of-mouth advertising in that it gives your campaign the ability to reach people beyond its constituent lists, allowing the impact of your message to grow exponentially. Because the message comes from a trusted friend, the chances increase dramatically that the recipient will open it. Most importantly, the recipient is unlikely to consider it spam.

*Online contributions on average are about three times as large as the average direct mail contributions.*

Despite the advantages of e-mail—and there are many—it is important to note that direct mail is better than e-mail at reaching certain demographic groups, such as older people who may not use e-mail or trust or feel comfortable with online transactions.

In order to reach the largest possible base of support with your fundraising appeals, both online and offline components are necessary.

**My offline fundraising activities are already successful, but I want to launch an online fundraising campaign. How can I ensure that my offline and online fundraising tactics enhance each other?**

Successful fundraisers know that cultivating their donors is the most time-consuming aspect of fundraising. In a typical organization, donor cultivation often takes years, beginning with the moment a potential donor first hears about the organization, continuing through his or her first (and, hopefully, not the last) contribution. At each step of the process, professional fundraisers work to personalize the message of the organization—or candidate—in a way that appeals directly to the interests, emotions and concerns of the individual donor.

In typical offline fundraising, the fundraiser is the face of the organization. He or she combines personal contact—greeting donors by name, remembering their children’s names and contacting donors with periodic updates about how their contribution is being used—with direct marketing tools, such as postcards, letters and updates to persuade the contributors that their donation is important. Similarly, in political campaigns, nothing is more persuasive to potential donors and supporters than one-on-one contact with the candidate—even if it is little more than a handshake—or with campaign team members who live in their communities and share similar interests. The Internet gives you yet another avenue to develop one-on-one contact with your base of support.

*The most effective Internet campaign will allow a fundraising team to incorporate and even evolve the best practices of offline campaigners.*

The donor cultivation process takes a lot of time, money and manpower—three resources at a premium in most campaigns. However, the cultivation and personalization process is an essential component in any fundraising effort, and it should not be neglected in your Internet campaign. The most effective Internet campaign will allow a fundraising team to incorporate and even evolve the best practices of offline campaigners.

#### What are some tips for cultivating donors online?

One of the most important steps in this process involves keeping supporter and constituent lists up-to-date and accurate. Correctly spelling your supporter's name in an e-mail, sending a fundraising appeal to the correct e-mail address and targeting potential donors with customized messages are important aspects of online fundraising. Even simple resources, such as the database programs that come standard on most computers, can be harnessed in this capacity.

A number of social networking software programs and Customer Relationship Management (CRM) tools and services allow campaigns to maintain up-to-the-minute information about donors and their interests. These allow you to tailor your messages to specific groups of people according to their demographics, interests or rates and amount of donation. When your constituents receive messages tailored to their interests and patterns of giving, they are more likely to become more active contributors to your efforts.

Second, your campaign or organization can cultivate support by building online communities of people who are interested in your cause. Some of the most widely discussed cultivation tools used in the 2004 presidential campaigns were Web logs, online discussion groups and *bundling programs*, which gave supporters the materials they needed to encourage more people to contribute. Bundling refers to the practice of recruiting donors or “bundlers,” who will convince their friends and neighbors to donate. These individual donations are collected, or “bundled,” into one large sum. Both Bush and Kerry used bundlers to fundraise in 2004. Online fundraising, which attracts primarily small donors, can act as a supplement and counterweight.

The idea is to build interest around your issue, allowing people to express their ideas about your cause, issue or candidate and, further, discuss solutions.

Third, social networking software—the programs that allow your constituents to contact each other, as well as members of the campaign team—will allow your campaign to develop an instant community of supporters who can share your fundraising appeals with their families, neighbors, work associates and friends. By creating a community of online supporters, your campaign can develop a grass-roots army of volunteer support and donors. You can personalize your candidate or cause in the minds of supporters by allowing them to share their enthusiasm with others, in both the online and offline community.

**It sounds like online fundraising requires a lot of staff. Why is this necessary when the Internet is supposed to be a cheaper, faster and easier medium?**

Using the Internet to cultivate donors and raise contributions is often cheaper and quicker, and it allows the fundraiser to target future contributors more efficiently than many offline campaign methods. However, to maximize its persuasiveness and the urgency of online appeal, Internet fundraisers must be vigilant about the Web site and constituent databases and be prepared to respond rapidly.

**You mentioned rapid response. How can rapid response be developed online?**

Rapid response means providing constituents, contributors and Web site visitors with up-to-date information about the candidate, campaign and the community, state or local issues involved. This requires coordinating your e-mail with your Web site to give constituents real-time news about the campaign. In the months after the presidential primaries, both the Bush and Kerry campaigns used rapid response online to counteract negative campaigning.

An effective rapid response campaign can energize your base, making them feel a part of the team and creating a bond that will facilitate your next solicitation. When your campaign uses rapid response techniques to highlight urgent fundraising needs, it may be able to meet lofty fundraising goals over a short period of time.

**What are some tips and techniques to keep in mind when coordinating a rapid response fundraising campaign online?**

All e-mail appeals should contain a link to your Web site. Because the goal of your e-mail should be to drive people to your Web site, particularly its donation page, displaying the most accurate information on your site is one way of showing your supporters the urgency of the issue, as well as the need for their contribution. It brands the image of your campaign as a successful, “on-the-ball” entity that wants its supporters to have the most accurate information possible about an event, a candidate or an issue that they care about.

However, rapid response means more than just updating your Web site. In *Winning Campaigns Online*, Emilienne Ireland and Phil Nash rank rapid response an important “Secret of a Successful E-Campaign.” They write that a successful campaign should reply to all e-mails within 48 hours.<sup>10</sup> For the purposes of fundraising, this includes e-mailing donors to thank them for their contribution and deliver their receipt.

Further, when your Web site visitors inquire about some aspect of your site or your campaign, make them feel as if their inquiry is of great importance to your campaign. Respond quickly! Most people will begin to feel ignored if they do not receive a response after two days. Give them the information they require, and, when possible, personalize your response. This provides a perfect avenue for your campaign team to cultivate their future support.

*When your campaign uses rapid response techniques to highlight urgent fundraising needs, it may be able to meet lofty fundraising goals over a short period of time.*

*In Winning Campaigns Online, Emilienne Ireland and Phil Nash rank rapid response an important “Secret of a Successful E-Campaign.”*

As mentioned above, updating constituent information, such as name, e-mail address and contribution amount, will allow your campaign to target future appeals.

Without vigilance and rapid response, you risk losing credibility and enthusiasm among your Internet base. Using technology like the Internet creates an expectation that people will receive a punctual response, as well as a prompt thank you. Fulfill the expectations by assigning staff to follow-up with contributors and respond to e-mail inquiries.

*Without vigilance and rapid response, you risk losing credibility and enthusiasm among your Internet base. Using technology like the Internet creates an expectation that people will receive a punctual response, as well as a prompt thank you.*

## **CAMPAIGN FINANCE AND THE INTERNET**

**Once my political campaign has begun to attract online donors, how can we ensure that we meet all of the legal requirements of campaign finance laws?**

This depends upon what type of campaign you are running. Federal races have different requirements than state or local races. In federal races, online fundraisers should keep three different legal requirements in mind.

First, the donation page on your Web site must ask contributors for several pieces of information that are required by law. This is the same information that your campaign must collect when it processes donations from events or direct mail pieces. Donors who aggregate \$200 or less must give their name and address. Donors who aggregate over \$200 must give their name, address, occupation and employer.

Your donors must also affirm that they are legal U.S. residents making a donation with their own funds and on their own credit card. Many candidates require their donors to answer a series of questions to confirm that their donation is legal. The John Kerry for President campaign, for example, asks each donor to check off a list of statements to ensure that he or she is at least 18 years of age, a United States citizen or permanent resident alien, is making the contribution from his or her own funds, is not a federal contractor, is making the contribution on his or her personal credit card and not with a business credit card or card issued to someone else. By comparison, the Bush campaign words some of these requirements slightly differently and asks donors to acknowledge that their contributions do not come from corporations or foreign nationals.

Second, your Web site must contain a statement that says it is paid for by your candidate's election committee. Your donation page must also include a statement informing donors that their contribution is not tax deductible for federal income tax purposes.

Finally, any unsolicited e-mail that a candidate's campaign committee sends to 500 or more people must include a statement informing the recipient that the e-mail was paid for by your candidate's committee. For more information, contact the Federal Election Commission at <http://www.fec.gov/>.

## What about state and local campaigns?

Information about sources of information regarding the requirements for state and local campaigns can be found at the Federal Election Commission. The contact information for each secretary of state through 2004 is printed in the table below.

Figure 2. State Election Office contact information for state and local campaigns from the National Association of Secretaries of State

State	Election Director(s)	Web Site	Phone
Alabama	Vicki Balogh	<a href="http://www.sos.state.al.us/election/index.cfm">http://www.sos.state.al.us/election/index.cfm</a>	(800) 274-8683
Alaska	Laura Glaiser	<a href="http://www.gov.state.ak.us/lgov/elections/homepage.html">http://www.gov.state.ak.us/lgov/elections/homepage.html</a>	(907) 465-4611
Arizona	Mary Jo Kief	<a href="http://www.sosaz.com/election/">http://www.sosaz.com/election/</a>	(602) 542-8683
Arkansas	Jill Belin	<a href="http://www.sosweb.state.ar.us/elect">http://www.sosweb.state.ar.us/elect</a>	(501) 682-5070
California	John Mott-Smith	<a href="http://www.ss.ca.gov/elections/elections.htm">http://www.ss.ca.gov/elections/elections.htm</a>	(916) 657-2166
Colorado	Bill Compton	<a href="http://www.sos.state.co.us/pubs/elections/main.htm">http://www.sos.state.co.us/pubs/elections/main.htm</a>	(303) 894-2200
Connecticut	Thomas Ferguson	<a href="http://www.sots.state.ct.us/ElectionsDivision/ElectionIndex.html">http://www.sots.state.ct.us/ElectionsDivision/ElectionIndex.html</a>	(860) 509-6100
Delaware*	Frank Calio	<a href="http://www.state.de.us/election">http://www.state.de.us/election</a>	(302) 739-4277
District of Columbia*	Alice Miller	<a href="http://www.dcboee.org/">http://www.dcboee.org/</a>	(202) 727-2525
Florida	Ed Kast	<a href="http://election.dos.state.fl.us/">http://election.dos.state.fl.us/</a>	(850) 245-6200
Georgia	Linda Beazley Kathy Rogers	<a href="http://www.sos.state.ga.us/elections/">http://www.sos.state.ga.us/elections/</a>	(404) 656-2871
Hawaii*	Dwayne Yoshina	<a href="http://www.hawaii.gov/elections/">http://www.hawaii.gov/elections/</a>	(808) 453-8683
Idaho	Tim Hurst	<a href="http://www.idsos.state.id.us/elect/eleindex.htm">http://www.idsos.state.id.us/elect/eleindex.htm</a>	(208) 334-2852
Illinois*	Daniel White	<a href="http://www.elections.state.il.us/">http://www.elections.state.il.us/</a>	(217) 782-4141
Indiana*	Brad King Kristi Robertson	<a href="http://www.state.in.us/sos/elections/">http://www.state.in.us/sos/elections/</a>	(317) 232-3939
Iowa	Sandy Steinbach	<a href="http://www.sos.state.ia.us/">http://www.sos.state.ia.us/</a>	(888) 767-8683
Kansas	Brad Bryant	<a href="http://www.kssos.org/elections/elections.html">http://www.kssos.org/elections/elections.html</a>	(785) 296-4564
Kentucky	Sarah Ball Johnson	<a href="http://www.kysos.com/">http://www.kysos.com/</a>	(502) 573-7100
Louisiana	Suzanne Haik Terrell	<a href="http://www.sec.state.la.us/elections/elections-index.htm">http://www.sec.state.la.us/elections/elections-index.htm</a>	(225) 219-9600

State	Election Director(s)	Web Site	Phone
Maine	Julie Flynn Deborah Cabana	<a href="http://www.state.me.us/sos/cec/elec/elec.htm">http://www.state.me.us/sos/cec/elec/elec.htm</a>	(207) 624-7650
Maryland*	Linda Lamone	<a href="http://www.elections.state.md.us/">http://www.elections.state.md.us/</a>	(800) 222-8683
Massachusetts	William Galvin	<a href="http://www.state.ma.us/sec/ele/eleidx.htm">http://www.state.ma.us/sec/ele/eleidx.htm</a>	(800) 462-8683
Michigan	Chris Thomas	<a href="http://www.michigan.gov/sos/0,1607,7-127-1633---,00.html">http://www.michigan.gov/sos/0,1607,7-127-1633---,00.html</a>	(517) 373-2540
Minnesota	Sherrri Mortenson Brown	<a href="http://www.sos.state.mn.us/election/index.html">http://www.sos.state.mn.us/election/index.html</a>	(877) 600-8683
Mississippi	Leslie Scott	<a href="http://www.sos.state.ms.us/elections/elections.asp">http://www.sos.state.ms.us/elections/elections.asp</a>	(800) 829-6786
Missouri	Betsy Myers Gayla Vandelicht	<a href="http://www.sos.state.mo.us/elections/">http://www.sos.state.mo.us/elections/</a>	(573) 751-2301
Montana	Elaine Gravely	<a href="http://sos.state.mt.us/css/ELB/Contents.asp">http://sos.state.mt.us/css/ELB/Contents.asp</a>	(888) 884-8683
Nebraska	Neal Erickson	<a href="http://www.nol.org/home/SOS/Elections/election.htm">http://www.nol.org/home/SOS/Elections/election.htm</a>	(402) 471-3229
Nevada	Ronda Moore	<a href="http://sos.state.nv.us/nvelection/">http://sos.state.nv.us/nvelection/</a>	(775) 684-5705
New Hampshire	William Gardner	<a href="http://www.sos.nh.gov/index.html">http://www.sos.nh.gov/index.html</a>	(603) 271-3242
New Jersey	Ramon de la Cruz	<a href="http://www.state.nj.us/lps/elections/electionshome.html">http://www.state.nj.us/lps/elections/electionshome.html</a>	(609) 292-3760
New Mexico	Denise Lamb	<a href="http://www.sos.state.nm.us/elect.htm">http://www.sos.state.nm.us/elect.htm</a>	(800) 477-3632
New York	Peter Kosinsky	<a href="http://www.elections.state.ny.us/">http://www.elections.state.ny.us/</a>	(518) 474-1953
North Carolina	Gary Bartlett	<a href="http://www.sboe.state.nc.us/">http://www.sboe.state.nc.us/</a>	(919) 733-7173
North Dakota	Cory Fong	<a href="http://www.state.nd.us/sec/Elections/Elections.htm">http://www.state.nd.us/sec/Elections/Elections.htm</a>	(800) 352-0867
Ohio	Patricia Wolfe	<a href="http://www.sos.state.oh.us/sos//elections/index.html">http://www.sos.state.oh.us/sos//elections/index.html</a>	(614) 466-2585
Oklahoma	Michael Clingman	<a href="http://www.state.ok.us/%7Eelections/">http://www.state.ok.us/%7Eelections/</a>	(405) 521-2391
Oregon	John Lindback	<a href="http://www.sos.state.or.us/elections/elechp.htm">http://www.sos.state.or.us/elections/elechp.htm</a>	(503) 986-1518
Pennsylvania	Monna Accurti	<a href="http://www.dos.state.pa.us/DOS/site/default.asp">http://www.dos.state.pa.us/DOS/site/default.asp</a>	(717) 787-5280
Puerto Rico	Aurelio Gracia Morales	<a href="http://www.ceepur.net/">http://www.ceepur.net/</a>	(787) 777-8682
Rhode Island	Robert Fontaine	<a href="http://www2.corps.state.ri.us/ELECTIONS/elections_division.htm">http://www2.corps.state.ri.us/ELECTIONS/elections_division.htm</a>	(401) 222-2345
South Carolina	Marci Andino	<a href="http://www.state.sc.us/scsec/">http://www.state.sc.us/scsec/</a>	(803) 734-9060
South Dakota	Kea Warne	<a href="http://www.sdsos.gov/">http://www.sdsos.gov/</a>	(605) 773-3537
Tennessee	Brook Thompson	<a href="http://www.state.tn.us/sos/election.htm">http://www.state.tn.us/sos/election.htm</a>	(615) 741-7956

State	Election Director(s)	Web Site	Phone
Texas	Ann McGeehan	<a href="http://www.sos.state.tx.us/elections/index.shtml">http://www.sos.state.tx.us/elections/index.shtml</a>	(800) 252-8683
Utah	Amy Naccarato	<a href="http://governor.state.ut.us/lt_gover/elections/elections.html/">http://governor.state.ut.us/lt_gover/elections/elections.html/</a>	(801) 538-1041
Vermont	Kathleen DeWolfe	<a href="http://www.vermont-elections.org/soshome.htm">http://www.vermont-elections.org/soshome.htm</a>	(802) 828-2363
Virginia	Jean Jensen	<a href="http://www.sbe.state.va.us/">http://www.sbe.state.va.us/</a>	(800) 552-9745
Washington	David Elliott	<a href="http://www.secstate.wa.gov/elections/">http://www.secstate.wa.gov/elections/</a>	(390) 902-4162
West Virginia	Cindy Smith	<a href="http://www.wvsos.com/">http://www.wvsos.com/</a>	(866) 767-8683
Wisconsin	Kevin Kennedy	<a href="http://badger.state.wi.us/agencies/elections/">http://badger.state.wi.us/agencies/elections/</a>	(608) 266-8005
Wyoming	Peggy Nighswonger	<a href="http://soswy.state.wy.us/election/election.htm">http://soswy.state.wy.us/election/election.htm</a>	(307) 777-7186
American Samoa	Solial Fuimaono	<a href="http://electionoffice.as/">http://electionoffice.as/</a>	(684) 633-2522
Guam	Gerald Taitano	<a href="http://gec.guam.net/regproc.html">http://gec.guam.net/regproc.html</a>	(671) 447-9791
US Virgin Islands	John Abramson	<a href="http://www.gov.vi">http://www.gov.vi</a>	(340) 773-1021

\* States where the Division of Elections does not fall under the jurisdiction of the office of the secretary of state or lieutenant governor.

Source: National Association of Secretaries of State, “State Election Office Contact List” ([http://www.nass.org/electioninfo/state\\_contacts.htm](http://www.nass.org/electioninfo/state_contacts.htm)).

These rules are constantly changing, so consult with an election law attorney from your area before proceeding. Sometimes local and state party organizations have such attorneys on retainer, and they may also know the latest rules.

Good sources of information include the Federal Election Commission (FEC) Web site ([www.fec.gov](http://www.fec.gov)), as well as the links to state and territory election offices at the National Association of State Election Directors Web site ([www.nased.org](http://www.nased.org)).

Both campaign Internet operations and volunteer efforts to support a candidate, which could be seen as an in-kind campaign contribution, must follow applicable election laws in collecting online contributions. Be sure to check with an expert beforehand, not afterwards.

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## CHAPTER 1 E-MAIL CAMPAIGNS

*William Greene, Ph.D.*

Michael Gilbert, in “The Gilbert E-Mail Manifesto” ([news.gilbert.org](http://news.gilbert.org)), summarized the correct approach to online fundraising: “Repeat after me: ‘E-mail is more important than my Web site!’”

*A good e-mail list is your campaign’s greatest fundraising resource.*

This does not mean you should not have a Web site. On the contrary, your Web site is an essential element of your Internet fundraising efforts. A Web site serves a myriad of purposes and plays a crucial role in many aspects of online campaigning. It simply is not the most important element of a fundraising campaign.

Your Web site can be used for a number of tactics, including the presentation of candidate information, issues education and volunteer recruitment, but its most important function throughout much of the campaign is to help generate an e-mail list that you can use again and again for fundraising, just like your house postal list. As echoed in other chapters through this primer, a good e-mail list is your campaign’s greatest fundraising resource. And it is the first important step to launching an e-mail fundraising campaign.

This chapter will focus on best practices for conducting e-mail fundraising campaigns, which exhibit many surprising similarities with—and differences from—more traditional postal mail campaigns.

### BUILDING AN E-MAIL LIST

**My campaign is constructing a Web presence from scratch. How do I build an e-mail list?**

Most importantly, do NOT “harvest” e-mail addresses in order to build your list. This includes everything from using software programs, such as those employed by unscrupulous spammers to gather e-mail address from Web sites and online directories, to trolling around Web sites and Usenet newsgroups and copying e-mail addresses to your list by hand.

No one wants to be added to any e-mail list—even yours—without his or her permission. The “house” list that you build needs to be strictly “opt-in.” This means that list members should only be added after they have *asked* to be added, either directly through a sign-up form or indirectly by a permission device, such as a check-off box when they make a contribution.

To begin building a good list, your Webmaster should create a sign-up form on your Web site. Anyone interested in receiving information about your campaign or organization can simply enter his or her name and e-mail address to sign up for your list. Prominently place a link to that form—or, better yet, a miniature version of the form itself—on every single page of your Web site. Make it easy!

## What technologies does my campaign need to develop its e-mail list?

Actually, the very act of sending e-mail can aid the development of your lists—if you use e-mail to drive people to your Web site, particularly to your e-mail list signup form.

You can also use offline activities to drive new signups to your e-mail list, including direct mail postcards and phone calls. When you snail-mail your constituents surveys that ask their opinions on local issues, ask them to include their e-mail address. During campaigns, precinct walkers with clipboards should ask residents for their e-mail addresses. Whatever it takes, get people to agree to sign up for that list!

Alternatively, send personal (and personalized, by name) e-mails to friends and supporters, asking *them* to send e-mails to everyone they know and encourage *their* friends to visit your Web site and sign up for your e-mail list. Doing this employs the power of “viral marketing,” which is discussed elsewhere in this primer. Viral marketing encourages people to forward your information for you. Their recipients then forward your e-mail to other people, and so on. People open these kinds of e-mailed messages more often than e-mail that comes from an unknown source because they actually know the message’s sender. If that person trusts the sender, he or she will be more likely to click on the links, visit your Web site and sign up for your e-mail list.

The quickest way to accomplish this is to rent *opt-in* e-mail lists. Send the recipients an e-mail on some hot issue regarding your candidate’s campaign or a big hot-button project your organization is working on, and tell them to “click here” to receive more information for FREE. If you have targeted correctly, your end result should be an “instant house list.”

## Wait a minute. Isn’t this spamming?

To clarify, *opt-in* e-mail lists are lists that were built by asking online users to subscribe to (“opt in to”) an e-mail list tailored to their interests. These lists can be general (“Click here to join our News Updates e-mail list for the latest information”) or topically specific (“Click here to join our e-mail list to receive information of interest to Whig Party members”). Members of these lists have asked to receive information, and they know when they get an e-mail *from the list owner* that it is something in which they have expressed an interest. This factor is extremely important.

## Should I buy e-mail lists?

NO! Well, let me qualify that: if you mean, should you pay money for a list of people who have not asked to be on your list, and then just add them to your list and begin e-mailing them, then NO. That is called spamming, and you will definitely end up regretting it when your e-mails are returned to you and your online fundraising revenues dry up.

*If a firm ever offers to give you possession of one or more of their e-mail lists, high-tail it out of there. They are spammers, and you will be too if you take their lists.*

However, you should consider paying money to owners and managers of opt-in e-mail lists so that they will send your e-mail messages to their own members, driving them to your Web site.

This is how opt-in e-mail list rentals work, and it is the biggest difference between *direct mail* and *direct e-mail* fundraising. With direct mail, you take possession of a rented postal list; with direct e-mail, you never take possession of an opt-in e-mail list, due to the high priority placed on Internet privacy. If a firm ever offers to give you possession of one or more of their e-mail lists, high-tail it out of there. They are spammers, and you will be too if you take their lists.

Remember that e-mail list rental can be a highly effective means of both list building and fundraising, if the lists you rent are targeted correctly.

#### **How do I manage all of this information?**

An activity called *list management* is a very important ongoing step in the development of your list. If funds permit, you may want to consider engaging a third party for list management, which includes updating your lists, organizing list signups, storing the lists and conducting your e-mail campaigns.

**List management seems to require a lot of resources. Can it be outsourced to save staff time? How much does it cost?**

A host of organizations and programs have been designed to fulfill this very important role. These range from free services (Yahoo! etc.) to paid vendors (Lyris and others) that will either host the list for you or sell you the software to host it yourself. The costs of outsourcing list management depend on the size of your campaign or organization, the size of your list, the frequency of your mailings and how concerned you are about complete control over the list. Personally, I recommend paying to keep that list under your full control. It is worth the investment.

## **TARGETING E-MAIL**

**How can I target specific messages through e-mail, particularly through rented lists?**

Unfortunately, targeting is not as easy online as it is with postal lists.

First of all, the “universe” of addresses is much smaller, though growing. In addition, many, if not most, e-mail lists are just names and e-mail addresses, and do not include any demographic or even geographic information.

Fortunately, because the cost to rent e-mail lists is usually much lower than it is to rent and mail to postal addresses, you usually do not need to be as specific in targeting. Many vendors even let you send different test messages to smaller portions, or “A/B splits,” of their lists. Your best bet is to find a Web site that focuses on one or more of your hot-button issues and pay that site to send your letter to their e-mail list. If your campaign is geographically specific, find a Web site that is

frequented by folks in that area. Your letter should either be a fundraising appeal or a “click here to receive free updates” letter, driving the recipients to your Web site to either donate or join your house list.

Here is a helpful tip: if you are fundraising, letters that have already proven successful in your direct mail campaigns will work well online, too.

**Okay, I’ve started building my e-mail list. What should I do now?**

TEST IT. Start sending e-mails! Your first few should be informational, as you start to “get your feet wet” and learn the “ins and outs” of managing a list. Trust me—you are going to make mistakes as you start out (sending the wrong copy, putting in the wrong subject line, sending to the wrong list—I have done it all and more!). It is best to go ahead and make those mistakes now, and just apologize to list members as you go along. The vast majority of them will be very forgiving—they make mistakes in e-mail all the time, just like you and I do. (Oops! I didn’t mean to “Reply To All” when I called him that name!)

*If you are fundraising, letters that have already proven successful in your direct mail campaigns will work well online, too.*

Over time, start trying out different tactics. Testing on the Internet is cheap, and you might even discover hot fundraising copy that you can then turn into direct mail. Test a lot of different things, including sending plain text versus HTML e-mails or alternating donation requests with informational messages. Try asking for different donation sizes. Once you have conducted several e-mail fundraising appeals, you can even start “data mining” your house file, e.g. sending different messages to people who have donated versus people who have not. Test it all, find out what works best and go for it!

**What is the difference between plain text and HTML e-mails? Which type of e-mail is best for fundraising appeals?**

A plain text message looks like a typewritten letter. An HTML message, by contrast, looks like a Web page with graphics, different fonts, etc. Most e-mail list software allows you to send either one (or even both at the same time). You need to decide how you want your e-mails to look.

If you want to send a message to a rented opt-in list, you probably want to stick with plain text, unless the list owner has data in hand that shows their members have higher response rates with HTML messages. That way, you will hit the “lowest common denominator.” Even with so many good e-mail programs available that read HTML messages with no problem, a lot of people either still cannot receive them or choose to turn all HTML & graphics off.

When you build your own house list, one thing you can do is include a checkbox that allows subscribers to self-select whether they want to receive text or HTML e-mails. Then, send the same message in different formats to each group of members.

One basic rule of thumb that I employ is that plain text works much better for prospecting e-mail to rented lists, and HTML works better to house lists. In fact,

you can even try some fancy stuff with your own list, like sending video messages in your HTML emails. But you need to TEST it all for yourself!

### How do I get recipients to open my e-mail, instead of deleting it?

Think about it this way: when you log into your e-mail, which messages do you read, and which ones do you skip or delete?

Simply put, you open the ones from people you know, and you probably do not open the ones from people you do not know. That is one of the main reasons why it is so important to get people to *opt in* to your e-mail list. If they know they have ASKED to receive stuff from you, then they will be much more likely to actually OPEN your e-mail when it comes through.

Make sure the return address clearly identifies that it comes from your campaign. Make the candidate or organization's name immediately visible. For example, consider adding the candidate's name to the subject line ("A special message from Aaron Burr for Governor").

When you rent an opt-in e-mail list, try to persuade the list owner to include a short introduction before your message, asking their members to "check out the important information below." And make sure the e-mail they send on your behalf is clearly marked as coming from the list owner, so the subscribers will have higher open rates and your message can get read.

### How often should I ask for money?

As often as your subscribers will give! The only way to know is to test, test, test. While I usually recommend sending an e-mail appeal to your house list at least once every two weeks, some lists will work better if asked once or twice a week, and other lists will have a dramatic decrease in response rates if you ask them more than once a month. Test your list with more frequent appeals. If you receive a lot of angry responses or "unsubscribe" requests, you will know to space out your fundraising appeals and send campaign news, press releases, etc. in between.

Do not FAIL to ask for money! These people have expressed explicit interest in your campaign. They DO want to help, if they are just asked, so ASK them!

E-mail fundraising is the wave of the future. While it will not replace direct mail, telemarketing, events, or face-to-face appeals any time soon, if you start utilizing an online component now in conjunction with your other methods, you will have an additional revenue stream that could make the difference between having enough money to win and wishing after you lose that you had at least tried.

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## CHAPTER 2 WEB SITES

*Phil Tajitsu Nash, Emilliene Ireland and Becki Donatelli*

In 2000 and 2002, political Web sites played a supporting role to other traditional campaign media. However, the fundraising, networking and communication skills demonstrated by presidential campaigns throughout 2003 and 2004 make it likely that political Web sites will be the centerpiece of electoral campaigns in 2004 and beyond.

In this chapter, we will explore how to create a Web site that generates funds and then review the maintenance tasks required so that successful fundraising will continue. E-mail outreach, hardware concerns and other related issues will be mentioned in passing, and will be explored at greater length elsewhere in this primer.

### OVERVIEW

**I'm ready to raise as much money online as John McCain did in 2000 and Howard Dean did in 2003. How do I start?**

Successful online fundraising, like any other kind of fundraising, starts with the proper combination of the right candidate, the right message and the right use of technology to get that message out. Whether you are running for city council, state representative or president of the United States, you can use the most effective technology to make your best case, but if you do not have a message that resonates with your constituents, and if you are not an effective spokesperson for that message, you will still not generate money, excitement or votes.

**What are the elements of a Web site that will allow me to raise money online?**

Start with strategy, not coding. Look at polls of your district. Talk with consultants who have run offline and online campaigns in your area. Determine the audience you want for your Web site, and then think about design issues.

For example, Sam Page is a medical doctor from the St. Louis area who ran a successful race for Missouri State Representative in 2002. Medical doctors and other health professionals were one audience he wanted to target with his Web site, but research showed that there were a lot of residents of his district who were involved in scientific research. So, aside from the usual Web site features targeting the press, we made sure to include features that appealed to this audience.

**Once I've decided on a strategy, how do I create my Web site?**

A Web site is a strategic plan that is implemented in code. The graphics, pictures, text, forms, interactive features and audiovisual files you place on the site must all flow from a strategic message or theme, such as "Time for a change," or "I'm the candidate with experience." While the day-to-day issues and press releases will

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change, the bedrock message should be clear to a Web site visitor within seconds of first looking at your Web site.

## **YOUR WEB SITE AS A PERSUASION TOOL**

### **How does this translate into contributions?**

Your Web site should be both a persuasion tool and a fulfillment tool. It should make the case for why people should give money, volunteer and vote for you, and it should also have easy-to-use tools to register for e-mail newsletters, volunteer for the campaign, and make donations. Once they have decided to support you, you should immediately give them ways to act on those impulses.

### **Concretely, what does this mean?**

First, let's explore the persuasion part of a good Web site. Then we can talk about fulfillment tools.

### **What do you mean by persuasion?**

Only a robber can walk up to someone and say, "Give me your money." The rest of us must make a case for WHY the potential donor should part with their hard-earned cash. The Web site must be appealing, interesting and important to potential donors so that they will come to the site, stay long enough to read a few things and ultimately go through the process of giving you money.

### **How do I make my Web site more appealing?**

There is no one-size-fits-all formula. When we created the Web site for Stan Matsunaka, a Congressional candidate from rural eastern Colorado, we included images of fishing, farming, hiking and other activities that residents of that district enjoy. Campaign staffers asked people living in the district to identify some of their favorite Web sites, and we checked those out to see if there were colors, features, phrases or images that would make our target audience feel more comfortable.

### **What makes a Web site interesting and important to the viewers?**

This question can only be answered if you think of a Web site as a living organism that changes in the course of a campaign life cycle. When a campaign Web site is first launched, the initial audience often includes seasoned politicians, including your potential opponents, prospective funders, members of the media and members of your political party hierarchy who are going to make a decision about whether to support you. Your Biography, Accomplishments and Goals pages receive the most hits in the first weeks of your campaign for this reason. The first impression you make on these key audience members is vital to the long-term health of your campaign, so each page should include error-free text, well-optimized photos and a design that is easy to use and pleasing to the eye.

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## SUCCESSFUL STRATEGIES FROM THE 2004 CAMPAIGNS

Once the Web site is launched, how do I keep it interesting and important to viewers?

Constantly including fresh content is the key to getting return visits and word-of-mouth publicity that generates even more visitors. Through the middle months of your campaign, you will use e-mail newsletters and offline publicity to generate new visitors. Online polls, Web logs, Web-based calculators of the costs of a piece of legislation, event photo galleries and other features will keep them coming back on a regular basis.

Be careful, however, to always think of the needs of the viewer first and your campaign second. This is counter-intuitive to those of us trained in television and other interruption-based media that are used to barging into someone's living room with a soap commercial or candidate pitch. The Web is what author Seth Godin called a *permission-based marketing medium*, where the visitor is just one mouse click away from leaving. Ignore their needs, and they are gone. Give them what they want and they'll tell their friends (and your send-a-friend tools will help them to do so).

Howard Dean's presidential campaign site was so successful at fundraising during 2003 because his offline message ("YOU have the power to take back this country!") was echoed in both words and features on his campaign Web site. Instead of just making a donation, the Dean Web site provided a way for you to build your own "Dean Team Leaders" page. Like Bill Bradley during the 2000 campaign, whose Web site made a point of showing you how your neighbors in your state and town were voting for Bradley, the Dean Web site included pictures and words from Dean supporters who tell you IN THEIR OWN WORDS why you should support this man.

Other features allowed you to send in photos you took at Dean campaign rallies so that you could see pictures of your friends and family (as well as a photo credit for yourself) on a nationally-recognized Web site. In an age of mass anonymity, with ersatz fame promised by Internet chat rooms and television reality shows, a chance to be seen on the Web site of a candidate whose views you share is a heady tonic (and a sure way to build a band of loyal followers).

**What are some of the other innovations that made Howard Dean's Web site so successful as a fundraising vehicle?**

Dean's team combined good technology with good strategy to generate the most online funds through the end of 2003. Like any good fundraising campaign, whether online or offline, they gave you the big picture and then broke it down into bite-sized pieces so that you could see how your little bit made a difference (remember how public radio stations give you their overall goal and then their goal for just that one hour of programming?). Hearing that George Bush planned to raise \$200 million, much of it through large donations, Dean countered with a

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*Within seconds of coming to your Web site, a visitor should get a sense that you are a top quality candidate with a positive, compelling message that can be summarized in a short sentence—the online equivalent to the “elevator pitch.”*

“\$100 Revolution” plan. “If 2 million of you are willing to give me \$100 each to throw Bush out of office,” said the Dean Web site, then Dean will have the \$200 million he needs to match the GOP fundraising machine. In the process, this populist message also created a valuable e-mail fundraising list of donors who have not reached their \$2,000 campaign donation threshold. If their help was needed again later in the campaign, they could be called upon a second or third time (people who donate once are likely to donate again, if only to validate their initial decision to donate).

### **Did the other Democratic presidential candidates use their Web sites effectively for fundraising in 2003?**

Federal Election Commission (FEC) data does not break out which donations were received online, but based on what candidates have told us, tens of millions of dollars were raised online by the other candidates for the Democratic presidential nomination.

We surveyed the candidate Web sites throughout the 2003 campaign cycle, and it was clear that the Dean campaign was head and shoulders above the others in terms of generating excitement and a feeling that an individual donor could make a difference. Nevertheless, other presidential candidates did some innovative things with their Web sites. For example, Wesley Clark’s Web site featured a prominent “Million Dollar Challenge” graphic, with daily updates of the number of donors and the amounts raised.

Dick Gephardt used an innovative image of a turtle to depict himself as the slow but steady performer who eventually would win the race. “Feed the turtle” was the phrase used on his Web site in December 2003, and visitors gave enough to raise several hundred thousand dollars in carefully calibrated campaigns with daily Web site updates on the amount raised.

Dennis Kucinich’s Web site provided several innovative ways for a visitor to help. “To broadcast a 30-second ad to Iowa voters, we need close to \$100,000,” his Web site told us. Or if you preferred, his Web site also allowed you to support a yard sign project, put Kucinich yard signs all across America or “Adopt an Intern,” to pay the salaries of the many young people who are volunteering or working for low wages. Pictures of the interns, recorded messages from them and brief descriptions of their work echoed the “save a child” messages that have encouraged us to “adopt” a child from a Third World nation.

### **Anything else I need to know about using my Web site as a persuasion tool?**

Within seconds of coming to your Web site, a visitor should get a sense that you are a top quality candidate with a positive, compelling message that can be summarized in a short sentence. Fundraisers talk about your “elevator pitch,” or the 15-second way you would describe what you do if you suddenly met a potential funder in the elevator. The most compelling (and least hackneyed) messages seen on the Democratic presidential campaign in 2003 were Dennis Kucinich’s “Fear

Ends. Hope Begins.” And Howard Dean’s Web site theme (which he also cleverly used for his Web site address (URL): Dean for America ([www.deanforamerica.com](http://www.deanforamerica.com)))

## YOUR WEB SITE AS A FULFILLMENT TOOL

OK, you’ve made a good case for using my Web site as a persuasion tool. Now tell me, what is a fulfillment tool, and aren’t all online contribution systems the same?

Using your Web site for fulfillment is more than just putting a contribution-collecting form on a secure Web page and hoping the dollars will pour in. Even this aspect of Web site development is part strategy and part technology. You must streamline the process so that the trust and credibility you have built with the visitor during the persuasion phase of the online experience can be converted quickly and painlessly to fulfill two needs: the visitor’s need to participate and the candidate’s need to receive the donations and offers of assistance.

*Offline fundraising experts will tell you that the most important part of the process of fundraising is making the “ask.”*

Even non-customized “templated,” non-strategic Web sites offer fulfillment services to candidates, because prospective donors, voters and volunteers can be converted to actual donors, voters and volunteers using the technological features available on the Web site. On many Web sites, prospective volunteers can fill in a form and tell what they want to do, when they are available and what issues interest them. This information can be sent to a campaign database where the volunteer coordinator can pull up the data the next day and contact the volunteer with a way she can be of help to the campaign. Prospective voters can find the location of their local precinct, deadlines for voter registration and ways to get a ride to the polls on Election Day.

Strategic Web sites in Campaign 2004, however, are developed with the audience in mind. This audience includes those who are comfortable with using their credit cards online as well as those who cannot or choose not to donate over the Internet. For this reason, well-designed fulfillment tools give prospective donors the choice of donating in any one of several ways. The John Kerry Web site, for example, provided ways to donate by phone, by mail and online. Those choosing to donate online could either give a one-time payment or set up a monthly debit of their credit card—which makes a larger contribution easier for the donor.

Unlike Campaign 2000, when online fundraising was still in its infancy, most federal, statewide and large local campaign Web sites in Campaign 2004 will have some way for prospective donors to give money online. However, the routinization of the giving process, with visitors to campaign Web sites used to seeing “Donate Now” buttons on top of the Web site or in a button on the left navigation bar, have also made the donation process so routine that campaign webmasters should try to highlight it with innovative graphics and features.

Offline fundraising experts will tell you that the most important part of the process of fundraising is making the “ask.” In other words, if you don’t ask, no one will give. The McCain presidential campaign used pop-up donation messages to good effect in 2000, but the advent of spam-blockers, which were devised to stop these

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pop-up messages because many Web visitors find them annoying, has rendered them less effective. The best strategy is to use clever graphics and concepts on your Home page that can lead prospective donors to your Donate page.

### **How can I create a clever contribution campaign for my Web site?**

Howard Dean's Web site in 2003 used a number of clever tools to make contributing to his campaign fun and meaningful. For example, instead of a hacked thermometer scale to show progress toward a fundraising goal, he used a baseball bat. This connoted that you were "playing ball" on the Dean Team, participating in a group effort that mirrored the use of Web logs, volunteer groups and other get-involved activities. On the 230th anniversary of the Boston Tea Party in December 2003, the Dean Web site featured a fun graphic of the usual baseball bat in Boston Harbor with tea bags floating in it and the message, "The tea is in the harbor!" A link took the visitor to the usual "\$100 Revolution" donation page, but the intriguing Home page graphic did the work of bringing the visitor there.

Instead of just asking for a personal contribution, the Dean Web site also gave the option of becoming a Dean Team Leader who could raise up to \$2000 through a personalized page on the Dean Web site. By including a personal picture and personalized reasons for supporting the candidate, over 3,000 people had raised over \$400,000 by late December 2003.

By setting deadlines (the upcoming primaries in early 2004), creating a compelling metaphor (the Tea Party in 2004 to overthrow the Bush regime) and using Web site tools that were fun and easy to use, the Dean Web site succeeded in creating a sense of urgency and purpose that resulted in the highest online contribution totals in 2003.

### **Isn't fulfillment more than just collecting dollars?**

Yes, and again, Howard Dean's Web site is instructive for its use of interactivity and eye-catching graphics to keep the visitor interested and involved. The Meetup.com phenomenon that first caught the attention of the media and the public allowed the Dean campaign to decentralize organizing in much the same way the John McCain campaign did in 2000. By giving up control, a campaign runs the risk that supporters may go off message in communicating with the press or potential new supporters, but that small downside is more than compensated for by the tremendous enthusiasm that is generated when volunteers feel that they "own" the campaign. Incidentally, this is the same spirit that propelled the "Draft Wesley Clark" movement into a credible campaign for the former general in a short time after his entry into the presidential race in the fall of 2003.

### **What do you mean by "interactivity"?**

Give your Web site visitors ways to contact the campaign, work for the campaign and make a difference in the outcome of the election. Some Web sites in the 2000 campaign refused to list a campaign phone number out of concern that they

would be flooded with phone calls. While that is a legitimate concern in a small, understaffed campaign, the flip side is that giving visitors ways to contact the campaign oftentimes results in more volunteers, voters and donors. Try to use Contact Us, Tell-A-Friend and other scripts whenever possible and use a simple online form to have the potential volunteers and donors do the typing rather than your overworked campaign staff whenever possible.

Other forms of interactivity include:

- The Bush campaign's Donor Information pages that display the names of its contributors and can be searched by name, contribution amount and date. The site also lists volunteer bundlers who have raised \$100,000 and \$200,000.
- The clever calculator that Dick Gephardt included on his Web site, where visitors could calculate the amount they would save if the Gephardt health care plan was enacted.
- Joe Lieberman's separate Web site linked from his campaign site that was called "BushIntegrityWatch.com." Visitors could see the ways in which President Bush's promises had not been fulfilled.
- The many ways a visitor to the John Edwards Web site could send a letter to a voter in Iowa, take a road trip to one of the early primary states or participate in a conference call with the candidate.
- The Organizer's Kit of pdf documents that Carol Moseley Braun created for activists who wanted to print out her resume, talking points on key issues and other materials that would make the case for their candidate.

## TECHNICAL DETAILS

What are some of the technical details I need to know?

Four details should be kept in mind when designing your Web site and online contribution system.

First, make the donation process as easy as possible for potential donors. Make sure they start filling in a form right away before they have to read a lot of text, so that they have made an investment of their time and will want to follow through to completion rather than stop and come back later (a guarantee that some will never return). Let the code do the work by pre-populating fields whenever possible, so that, for example, the donor does not have to retype her address in the credit card data section of the form after she already entered her address information earlier in the form.

Second, democratize the site as much as possible by creating an easy-to-use content management tool so that staff without HTML coding experience can update press releases, the Home page and other frequently updated pages.

*Make the donation process as easy as possible for potential donors.*

*Let the code do the work by pre-populating fields whenever possible, so that, for example, the donor does not have to retype her address.*

*Every direct mail piece, radio ad, newspaper ad and other form of campaign communication should contain the Web site URL in a prominent position.*

Third, make sure that the security of donor and volunteer data is your primary concern. Are all pages where data is collected encrypted? Is the data collected stored in a secure offline location? Do the vendors you use agree to not resell the data or use it as a corporate asset if they go bankrupt? Do you have a strong Web site privacy policy that is followed by every member of the campaign staff? Privacy tools are discussed later in the primer.

The commercial sector is dealing with some consumer reluctance to give personal information over the Internet because of well-publicized breaches of privacy. As online campaigners begin to use commercial-quality Customer Relationship Management (CRM) tools such as databases, targeted e-mails and personalized sections of the campaign Web site, extra care must be taken to preserve the trust of each visitor (and potential voter).

Finally, every member of the campaign team, offline and online, should get comfortable with Web site statistics and activities. Which pages are receiving the most hits? On which days of the week and at what times are most visitors coming to the Web site? How well are offline pitches via television ads or direct mail pieces being coordinated with online efforts (such as the coding of unique donation pages so that visitors to that page can be counted as traffic generated by a particular television ad or direct mail effort)?

## **ONLINE-OFFLINE SYNERGY**

**Did you say that everyone in the campaign must get involved in Web work, not just the designated Web team?**

Absolutely. The best possible way to generate more traffic to your Web site, which results in more contributions to your candidate, is through synergy between your campaign's offline and online activities. TV spots should include a reference to the Web site URL that is visible for at least 5 seconds and in a font size that is clearly visible. The candidate should mention the URL in every speech and use a sign with the URL printed on it in front of the podium whenever she speaks. Every direct mail piece, radio ad, newspaper ad and other form of campaign communication should contain the Web site URL in a prominent position.

## **CONCLUSION**

**How will I know that my campaign Web site and online campaign have been successful?**

The "Evaluating Success" chapter of this primer provides some numerical ways of evaluating success. Don't forget, however, that your campaign and your campaign Web site are influencing public opinion and having an effect on your community no matter who wins or loses the election. By presenting your views in a coherent, professional manner online, you are taking a stand and making a case for changing the world. In the process, you are standing up for the free flow of information and helping to strengthen democracy in our nation.

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What better reasons for going out and launching your online campaign?

## CASE STUDY

The “ask” portion of your Web site should have a prominent position on your campaign’s home page. It should be direct, and it should help visitors visualize themselves donating. Seeing yourself doing something is one of the first steps to actually accomplishing it.

The Internet allows you to be creative when asking for a donation. Even the “ask” portion of your home page can be designed creatively to engage visitors and move them towards making their first (or second) donation.

The John Kerry for President Web site, like the Web sites of other presidential candidates, offers donors the possibility of contributing to the campaign through monthly giving plans. These types of plans have been used by nonprofit organizations for decades to make the giving process seem a lot less intimidating. Through monthly giving plans, donors can give regular payments in small amounts—instead of or even in addition to making large, one-time contributions.

One of the tactics the Kerry campaign used to drive people to join a monthly giving campaign was to ask Web site visitors, “Would you give up dinner and a movie to change the country.” Echoing appeals by humanitarian organizations for people to give up their daily cup of coffee to sponsor a starving child, the Kerry slogan showed how the value of the contribution possessed a real cost—about the same as dinner and a movie—and showed how small sacrifices can make a difference, allowing the campaign to “plan for the fight ahead.”

When visitors clicked on the “Dinner and a Movie” link, they were taken to a single Web page—as opposed to the multiple Web pages an online shopper must regularly move through in order to make an online transaction—that asked for their information, credit card number and amount they wanted to donate per month.

Through tactics like this, the Kerry campaign raised over \$56 million dollars online by the end of the second quarter of 2004, including \$3 million raised on June 30, which set a new record.

## CHAPTER 3 VIRAL MARKETING

Larry Purpuro

*The idea behind viral marketing is simple: consultants create messages that excite, stimulate or engage their audience. Recipients then spread the messages by sending them to their friends, family or business associates.*

*The whole point of viral marketing is to create an e-mail buzz. This buzz will drive your fundraising message to reach a wide audience.*

Humor generates interest—the type of infectious appeal that compels people to share your messages with others. A poll conducted by the Institute for Politics, Democracy & the Internet in 2000 showed that more than half of the online public sent or received a humorous e-mail about the elections that year. Sharing these entertaining messages became the most common type of political engagement on the Internet during the 2000 election.

Constructing humorous messages is just one form of *viral marketing*, a strategy that Internet fundraising consultants employ to encourage others to pass on carefully constructed messages to their friends, family and contacts.

### What is Viral Marketing?

Viral marketing harnesses the power of “word of mouth” communication. It marries the Internet consultant’s skills at constructing compelling messages with the contact lists of hundreds or thousands of people. The idea is simple: consultants create messages that excite, stimulate or engage their audience. Recipients then spread the messages by sending them to their friends, family or business associates.

When using an electronic medium like the Internet, this means composing innovative, smart e-mail content that your core base of Internet activists, donors or supporters will want to forward to others.

That content can include anything that generates interest, from a joke, to a direct call to action, to a link to a video of your candidate. Above all, it must be compelling. The whole point of viral marketing is to create an e-mail buzz. This buzz will drive your fundraising message to reach a wide audience.

A study by the Institute of the people involved through the Internet in the 2004 presidential primaries showed that one of the ways that these influential Americans spread their influence was through e-mail. The study found that 87 percent of them had signed up to receive e-mail and 66 percent of them had forwarded e-mail to others. The lesson from the study is this: give your online supporters something clever, humorous or compelling to forward, and they will do it!

## HARNESSING THE POWER OF VIRAL MARKETING

### What kinds of messages do you use in viral marketing?

There is no one formula for creating a viral marketing piece. Creativity, innovation and strongly crafted appeals can produce a variety of viral marketing messages. What matters the most in viral marketing is how your audience relates to your message.

For example, if you want to craft a viral marketing message about your candidate's patriotism for voters over the age of sixty-five, consider including images that evoke patriotism in an older generation, such as a picture of soldiers painted by Norman Rockwell or a black and white photograph of your candidate serving in the military. Include a unique caption linking heroism and patriotism to your fundraising appeal. These images will more effectively evoke the feeling of loyalty in your older audience than a funny animated e-mail of Uncle Sam chasing Osama bin Laden. Similarly, you may more effectively reach a younger audience with color photos or Web video of young soldiers or images of the Blue Angels flying in formation.

The cultural and political tastes of your target audience reflect what kind of message will resonate with them and compel them to take that extra step to forward the message on to others.

You may not require in-depth research and focus groups to determine the most effective message. Perhaps the best research about your audience's taste can be accomplished simply by noticing what types of messages friends and family forward to you. What kinds of things do you receive from your nephew or niece? Your best friend? Your colleagues?

**So there is no one formula for getting a viral message “right.” Is there anything I should keep in mind while creating viral messages that will maximize their results?**

Below are five basic elements of any viral effort to gain positive results.

#### **1. Think promotional.**

Most viral marketing programs give away valuable products or services to draw attention. “Free” attracts eyeballs. Give away something. Sell something.

#### **2. Make forwarding to others easy.**

Viruses only spread when they are easy to transmit. From a marketing standpoint, you must simplify your marketing message so it can be transmitted easily and without degradation. Short is better.

#### **3. Tap human nature.**

Clever viral marketing plans take advantage of common human motivations. Greed drives people. So does the hunger to be popular, loved and understood. Design a marketing strategy that builds on common motivations and behaviors for its transmission.

#### **4. Understand and use existing people networks.**

Most people are social. Social science suggests that each person has a network of about 10 people in their close network of friends, family and associates. People

*What matters the most  
in viral marketing is  
how your audience  
relates to your message.*

on the Internet develop networks of relationships, too. They collect e-mail addresses and favorite Web site URLs. Learn to place your message into existing communications between people, and you rapidly multiply its dispersion.

#### 5. Exploit others' Web sites.

Use others' resources to get the word out. Affiliate programs, for example, place text or graphic links on other Web sites. Authors, who often give away free articles, seek to position their articles on other Web pages.

*Recipients who forward your campaign message to others are telling their friends and family, in effect, "I think you should consider contributing to this campaign."*

**Why does my campaign need viral marketing? Is it really as cost effective as you claim?**

Viral marketing has the potential to be one of the most cost effective communication tools in a campaign. After the initial, up-front cost associated with producing the message, a tremendous value-added benefit occurs with every message that your recipients forward to their personal mailing list. Messages that spread virally can reach people far beyond a campaign's initial mailing list, and they reach an expansive population at no additional cost to the campaign.

This is the greatest single advantage of using an Internet tactic like viral marketing in a fundraising campaign. Each viral message that your campaign sends will allow you to reach hundreds or thousands of potential donors. Further, receiving your campaign's carefully crafted message enables each recipient to make a contribution right away, while they are still focused on your candidate or issue.

## FUNDRAISING WITH VIRAL MARKETING

### How can viral marketing be used as a fundraising tool?

Viral marketing is still a largely unproven technique, especially in the political arena. Until the 2004 Presidential election, most campaigns did not yet possess the capability to track donor activity or determine which of their recipients forwarded the fundraising appeal on to others. Though appropriate technology has been developed to harvest this type of information, campaigns, for the most part, have not designated adequate resources to this type of research.

Additionally, one effect of viral marketing cannot be quantified. The act of forwarding a campaign appeal to friends, family or colleagues is an endorsement of the campaign. Recipients who forward your campaign message to others are telling their friends and family, in effect, "I think you should consider contributing to this campaign."

Viral marketing will provide a tremendous area of growth for online campaign activity. Campaigns that invest time and creative energy in this approach will realize enormous gains in the form of free, value-added exposure to potential donors.

**I want to launch a viral marketing campaign to raise funds for my candidate. What steps do I need to take at the beginning to ensure a successful campaign?**

Keep several things in mind before you launch a viral marketing campaign.

First, build an audience sizeable enough that your campaign will benefit from viral marketing. This involves collecting or harvesting e-mail addresses from past supporters, volunteers and contributors as visitors who request information from your site, voters registered with your party and people who you feel will make a receptive audience. After all, the very concept of viral marketing relies on an ever-increasing audience that will pass messages to others.

Next, methodically message, stimulate and entertain that audience in all aspects of your campaign. Possessing an audience that you have conscientiously cultivated gives you a pre-assembled “target group” who will take the additional step to forward a campaign communication. Until this year, most campaigns have not possessed the resources, the focused attention or the skill set to accomplish these first two activities—building an audience and entertaining or developing them.

In reality, money is not the issue that poses the greatest challenge to a viral marketing campaign. Rather, your campaign must be in the position to focus more staff power on developing a stimulating dialogue with your base of support. The relationship between campaign and audience that results from this type of dialogue makes people more receptive to your viral marketing appeals.

One challenge that viral marketing poses for political candidates and their campaigns is the construction of an integrative campaign in which both online and offline activities support and reinforce each other. Online and offline activities should work cohesively from day one to build a stimulating dialogue with a large enough audience. After cultivating your base of support, your campaign can take its online fundraising appeals to the next level—harvesting a focused population receptive enough to engage in a viral stimulant, such as a well-crafted appeal.

*Online and offline activities should work cohesively from day one to build a stimulating dialogue with a large enough audience.*

## **THE VIRAL MARKETING STRATEGY**

**Earlier, you outlined a few viral marketing strategies. How can I develop a successful viral marketing strategy for my campaign?**

As discussed above, effective viral marketing strategy requires a commitment on the part of the campaign to develop a large e-mail audience. You can call people and ask for their e-mail address. Or, you can write to your constituents and ask them to fill out a postage-paid reply card. If they are not eye-catching enough, these types of appeals often become lost in a pile of junk mail. That is why it is important to continually think of innovative ways to engage your constituents. Another option is door-to-door canvassing. This approach requires both manpower and time—two resources that may not be available to your campaign.

*People will not forward a message that they have seen before.*

But developing a base e-mail audience is only the first part. You must also cultivate that audience and provide them with messages that both energize and motivate. Viral marketing, in many ways, provides the ideal complement to campaigns.

In every campaign, candidates must connect substantively with the people they want to represent. Viral marketing, comparatively, is a people-driven medium. Yet, it also requires creativity and a commitment to experimentation. Too few campaigns have invested the creative energy required to build and nurture a substantive connection with their audience. And without that connection, there can be no viral marketing campaign.

Finally, your viral marketing campaign must contain an element of unpredictability. That is, if you have built a large e-mail list, if you have worked hard to cultivate the audience with well-targeted messages, you still must compose an original, unique joke, comment or caricature that evokes emotions and responses in the hearts and minds of your audience.

People will not forward a message that they have seen before. They do not fill their friends and family's mailboxes with old and tired adages, even if they agree with the message. Ideas and appeals that spread virally contain a message that accurately predicts peoples' sentiments in a new and exciting way. This is difficult to quantify, but it is vitally important.

#### **What is the most important part of a viral marketing campaign?**

Copywriting, copywriting, copywriting. Effective viral marketing requires the ability, on the most elementary level, to communicate effectively with people and to write words that inspire—and in so doing, to impel them to share their views, reinforce their beliefs and motivate them to spread the word.

If you look at the difference between a successful Internet campaign and an unsuccessful one, success is neither a function of great technology, nor a larger staff, nor a unique set of programming skills. Success lies in the campaign's commitment to communicate with its audience in an inspiring way and to articulate an agenda that matters to the audience.

#### **CASE STUDY**

In North Carolina, Sue Myrick for Congress 2004 demonstrated how a state-level campaign utilized the same Internet tactics employed by the much larger presidential campaigns. The Myrick site incorporates a blog, Web videos, an E-Team Captain program and regular newsletters in its supporter cultivation and fundraising programs. It met with great success when the campaign sent out its first e-newsletter to supporters, accompanied by a viral message that asked its recipients to forward it on to others.

This first e-newsletter introduced five personal, compelling ways that Myrick supporters could get involved with the campaign and presented them in such a way

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that it made people want to share the message with others. Instead of making their first campaign e-mail a lengthy written document, the campaign incorporated a Web video of the candidate explaining how to get involved: log onto the Web site, become an E-Team Captain, join Sue’s crew, visit the campaign blog or contribute. Then, the text listed each action, and it included links directly to the corresponding Web pages.

Hal Weatherman, campaign manager, believed that the focus of Myrick’s first online contact with her supporters should be on introducing the candidate and the campaign to the public, instead of on immediately asking for a donation through what is called a hard solicitation—an appeal that directly and sometimes aggressively asks for a donation and makes the “ask” the focal element of the contact. This first viral message cultivates supporters, and it contains a soft solicitation: the fifth and final action suggests that people can make a contribution “to help make my campaign and this technology possible.”

Through techniques like this, the Myrick campaign raised \$104,378 during the first quarter of 2004 for a total of \$512,164 in contributions.

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## CHAPTER 4 RECRUITING NEW DONORS

*Max Fose*

This primer dedicates several chapters to cultivating donors online and getting to the “ask”—the most important step in successful fundraising. However, another important, though often overlooked, part of fundraising requires reaching out to new donors—a sometimes-difficult process. After all, it is more complicated to interest someone you have never met in your candidate, organization or initiative than it is to return to your cadre of current donors, all of whom are already engaged in your cause.

*Everything a campaign does online should be directed at recruiting new donors.*

The Internet can be a very useful tool in new donor recruitment. It is particularly effective when used as a part of an integrated campaign in which face-to-face contact combines with information on your Web site or in viral messages to effectively pique the interest of new donors.

### MOVING DONOR RECRUITMENT ONLINE

**How important is online donor recruitment?**

Everything a campaign does online should be directed at recruiting new donors.

Visitors to a political campaign’s Web site are always just a click away from making a donation. Therefore, every page, image and article on your Web site complements the donor cultivation process. Your Web site should persuade your visitors—on an individual, personal level—to invest financially in your candidate.

**My campaign already has a successful fundraising program that uses both direct mail and personal contact to attract new donors. Why should I move some of our efforts online?**

Simply put, donor recruitment cannot be accomplished as easily through offline marketing, such as television advertisements, radio spots or direct mail, as it can online. Each of these offline campaign mediums requires the potential donor to make additional steps in order to contribute to your campaign. With direct mail, other distractions may interrupt the donation process—taking out the garbage, driving the kids to soccer practice, answering the phone or making dinner—before the supporter can write a check to your campaign and stick it in an envelope.

The Internet personalizes this process: it makes political contributions extremely accessible, and it allows you to design Web site content that directs visitors to your contribution page—before they are distracted by something else, such as another television advertisement, an opponent’s radio spot or getting dinner on the table.

**What sort of demographic donates online? Whom should my e-mail and Web site target?**

Online donors essentially possess the same demographics and campaign interests as offline donors. They typically range between the ages of thirty-five and fifty, are politically active and have higher levels of education. Many online donors use the Internet to make their first political contributions. They represent a previously untapped resource that your campaign should harness.

**What kinds of donations can I expect from new donors on my Web site?**

Average online donations vary between \$100 and \$112. This figure is much higher than a typical contribution made as a result of a direct mail fundraising appeal, which averages \$35.

**These numbers are incredible! Why do people donate more money through the Internet than as a result of receiving a fundraising appeal in their mailboxes?**

First, people who go online and seek your Web site are more committed than most. They are already interested in your candidate and campaign; otherwise they would not have sought it online. Taking them to the next step—making a donation—therefore becomes a little easier than attracting donors through direct mail appeals or media spots.

Second, your Internet campaign possesses an interactive dialogue with its visitors. That is, people can post comments or questions through a well-designed political Web page or blog (Web log), whereas direct mail only provides one-way communication with voters. This makes people feel more intimately involved with the campaign, as if they are a part of it and can become directly engaged in the action—even if that period of action only extends as long as their five-minute visit to your Web site. By contrast, direct mail and advertising messages from the campaign reach the recipients, but recipients cannot immediately respond to your campaign's appeals.

Finally, online communication is inexpensive. You can contact potential donors more than once at little additional cost to your campaign budget. Each e-mail that your campaign sends brands your candidate and your issues a little more in the minds of voters, thereby accomplishing one of the goals of your campaign at very little cost.

## **DONOR RECRUITMENT TACTICS**

**What is the best way to ask new donors for a contribution?**

Very few people will log onto your Web site specifically to make a contribution. That would be analogous to walking into the campaign office with a bag of money.

People need a reason to give, to feel like they are doing something worthwhile.

*Average online donations vary between \$100 and \$112. This figure is much higher than a typical contribution made as a result of a direct mail fundraising appeal, which averages \$35.*

*The best time to send out a fundraising e-mail is after lunch on Tuesday, Wednesday or Thursday.*

The campaign needs to make its fundraising solicitation urgent and pressing on the Web site and in e-mail. In other words, the Internet is all about *right now*. Make your appeal urgent and alluring!

#### **How often should I ask for a donation?**

You do not have to ask for money every time you communicate with the voter. Some campaigns want to ask for money all of the time, but this turns some supporters off. If people think all the campaign ever does is ask for money, they will simply delete your e-mail fundraising appeals every time they appear in their inbox. *A better strategy is to ask for money every seventh e-mail or about once every two months.*

#### **When is the best time to send a fundraising appeal?**

The short answer is after lunch, say 2:00 p.m., on Tuesday, Wednesday or Thursday, preferably Thursday. Here's why: Many people do not check their e-mail over the weekend. By Monday morning, their inboxes are clogged with e-mail and anything except the necessities is deleted. So Monday morning is out. And during the rest of the day on Monday, people tend to be especially busy. Similarly, on Friday, people are trying to finish up so they can leave for the weekend. Consequently, it is probably not a good idea to send e-mail on Friday or Monday.

That leaves Tuesday, Wednesday or Thursday. My experience is that Thursday tends to get a slightly better response. However, send the e-mail so that it arrives after lunch. E-mail sent overnight will get lost in the increasing flood of spam that awaits everyone when he or she arrives at the office in the morning.

#### **What do I need to know to move new donors through the contribution process on my Web site?**

Once a donor has made the decision to contribute to your campaign, the process should be as easy as possible. Arduous and inefficient contribution pages cause potential donors to drop off before the contribution process is complete.

The contribution process itself can be a lengthy one. At a minimum, your contribution page should ask for each donor's name, address, city, state, zip code and credit card number and expiration date. Contributors must also confirm that they are using a personal credit card.

If you are fundraising for a federal political race, your campaign must make certain that it obtains all the necessary donor information to satisfy FEC requirements. You should also obtain their occupation and employer. As discussed previously, this is required of donors whose aggregate contributions have exceeded \$200. More information about what the contribution page should look like for a candidate for federal election is contained in the introduction to this primer.

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The challenge lies in getting all of this valuable information without losing the contribution along the way. If a person feels as though he or she has to jump through hoops just to make a contribution, your Web site will attract more aborted donation attempts than actual contributions.

**My campaign recently started fundraising online. How can we measure our success?**

There is no magic number for online fundraising. For example, response rates range from as low as one percent to as high as 33 percent. Response rates are generally better if the message is current and reflects messages from other outlets.

For this reason, good e-mail reinforces your supporters' pre-conceived biases about your candidate, their community or the state of the nation. You can accomplish this by referring to current events in your e-mailed fundraising appeals. This will create a sense of urgency in the minds of your supporters that may prompt your recipients to click the donate button and help the campaign.

**I recently read that data mining can be an effective targeting tool. What is it and how will it help my fundraising campaign?**

Data mining describes the process of accessing a database program and searching for additional information on potential supporters that is not immediately evident. If, for example, you have the *physical* addresses for 100,000 people on your mailing list, data mining might mean getting 100,000 *e-mail* addresses for these people.

There are an unbelievable number of donor lists that provide contact information for offline political supporters, but obtaining their e-mail contact information usually proves to be much more difficult. Political consultants now face the challenge of transforming these offline databases into online lists.

Your campaign can translate offline support into online activism by matching lists of offline contact information with lists of online information. The extra effort will reap many benefits. It is less expensive to communicate with donors online. Further, bringing your donor lists online means you can communicate with donors more frequently and less expensively than you could offline.

## CASE STUDY

Citizens for Tax Repeal ([www.repealthetax.com](http://www.repealthetax.com)) began as a grassroots effort led by Ohio Secretary of State Ken Blackwell in response to the Ohio General assembly and Governor's decision to fund an 11 percent budget increase and a "temporary" one percent sales tax increase. Blackwell, a Republican, felt that spending in Ohio was out of control. In September 2004, he launched an Internet campaign to mobilize Ohioans and circulate petitions to repeal the tax.

Blackwell turned to the Internet because it is such a cost effective medium: the campaign had only three months and limited coffers to collect the 96,000 signatures necessary to force a debate on tax repeal. The campaign had to accomplish this

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while operating on a thin budget. And, due to state regulations, it had to draw petitions from all of the state's regions, including heavily rural counties.

After unveiling their Web site, the campaign launched a recruitment campaign focused on alerting the public about the problem and educating them about the need for tax repeal. Much of this outreach was online—to very successful results. The Web site was designed to explain why the tax should be repealed and included news articles on the issue from across the state. Then, Citizens for Tax Repeal initiated a series of interactive flash cartoon ads, put targeted video ads on the Web sites of Ohio's major state newspapers, and initiated a series of e-mail and radio messages. All of the campaigns online and offline outreach directed people straight to the Web site.

Supporters engaged in the cause were given the materials necessary to recruit others by circulating petitions, and they were encouraged to make donations online. The site received over 708,282 hits in a four-month period and recruited more than 3,880 e-mail addresses. About 18 percent of the site's visitors took some form of action, such as donating. More than 100,000 of them signed petitions. And, most importantly, the campaign raised enough money to continue its efforts.

## CHAPTER 5 PRIVACY

*Julie A. Barko and Kevin Wells*

Your campaign's most valuable asset is its supporters. According to the Better Business Bureau Online (<http://www.bbbonline.org/privacy>), almost three-fourths of online users surveyed are more concerned about their private information online than any other factor.<sup>11</sup> In fact, fear about how their “personally identifiable information” (PII) will be used was frequently cited as one of the most compelling reasons why some users choose not to do business online.

A 2003 study by the Institute, *Privacy, Security and Trust on the Political Web*, revealed that the majority of Internet users hesitate, for similar reasons, to provide their e-mail addresses and credit card numbers to political Web sites. Ensuring that the personal information of your supporters is protected and demonstrating active strategies that protect it allows your organization to build the type of trusting relationship with its supporters that encourages future giving.

As the Internet becomes an increasingly developed tool for integrating many different aspects of a campaign, your supporters, donors, volunteers and interested voters will grow more concerned about whether your Web site will share their PII with third parties without their permission. Running an effective campaign, like running a successful business, requires that you proactively work to address these concerns and assure your supporters that their information will be protected.

Be warned, however. Commercial marketers, other candidates and non-profit political groups value your constituents' PII,<sup>12</sup> as much or more than you do. Many may offer to purchase this information from you in order to advertise directly to your donor base—a practice that some of your supporters may find invasive and annoying.

This chapter will give you the tools to avoid some of the pitfalls of online campaigning and develop sound privacy policies that assure your supporters and donors that you value their trust.

### CREATING PRIVACY STRATEGIES FOR YOUR ONLINE CAMPAIGN

#### Where do I start?

There are several steps to developing sound privacy structures in your campaign or organization. First, your campaign should know what is out there in terms of rules and assistance. This includes understanding federal and statewide laws, as well as what other organizations are doing to protect the privacy of their constituents.

Second, create a privacy policy for your organization. This policy should be a clear and accurate reflection of steps your organization is taking, and will take in the future, on behalf of its donors.

Finally, follow through with your privacy policy. Create and act on procedures designed with your constituents' interests and concerns in mind.

## KNOW WHAT IS OUT THERE: PRIVACY REGULATIONS

### Are there any laws guiding Internet privacy?

Several federal laws regulate privacy on the Internet. Most of these laws either do not cover the sort of information collecting that political campaigns conduct during the typical election cycle, or political committees are exempted from coverage. However, possessing a basic knowledge of them may protect your campaign's Web site from unintentional blunders:

- **The Children's Online Privacy Protection Act (COPPA)** of 1998 applies to the online collection of personal information from children under the age of thirteen. It contains rules about what Web site operators must include in their privacy policies, when and how to seek verifiable consent from the parents of children under 13 and the responsibilities that online operators have to protect children's privacy and safety online. COPPA does not apply to the Web sites of most non-profit entities, including political committees. However, many committees choose voluntarily to comply. In any event, use caution when collecting information directly from the pages of your Web site that are heavily issues-based and may be used by school-age children to research current events, history or government. A Supreme Court ruling on June 28, 2004 extended the ban on COPPA's enforcement.
- **The Controlling the Assault of Non-Solicited Pornography and Marketing (CAN-SPAM) Act** of 2003 requires that companies that send commercial e-mail comply with specific requirements. It requires all unsolicited e-mail to be labeled, include opt-out instructions and contain the sender's physical address. Deceptive subject lines and false headers are prohibited. The act also authorizes the FTC to create the equivalent of a do-not-call registry for e-mail. However, the Act *specifically exempts political e-mail*.
- **The Uniting and Strengthening America by Providing Appropriate Tools Required to Intercept and Obstruct Terrorism Act** of 2001 (USA Patriot Act) allows law enforcement to use a subpoena to gather user information from Internet Service Providers. This information includes a user's name, address, local and long distance telephone billing records, telephone or other subscriber number or identity, length of service, types of service utilized by a customer, records of session times and duration, temporarily assigned network address, source and means of payment. Political committees are not exempt.
- **The E-Government Act** of 2002 defines steps that government agencies must take to ensure the privacy of personal information online. Under this act, federal Web sites must include a privacy notice that contains background on what type of information is collected from users, why, its intended use, notice of choices that users have concerning what is collected and how it is shared, how information is secured and the rights of users under the 1974 Privacy Act and other laws.

In addition the act requires federal Web sites to translate their Web privacy policies into the P3P standardized format. The E-Government Act provides a glimpse at the type of privacy standards that may govern private, industry, and campaign Web sites in the future. Privacy policies, as discussed below, are a key component for any Internet Campaign fundraising strategy. Using the P3P machine-readable format, also discussed below, will allow your Web site's users to easily summarize and understand your site's privacy policies.

Again, political committees are covered, given that the law pertains only to governmental bodies.

- There are two other laws to be aware of, even though they do not specifically relate to privacy, and even though political committees are exempt. One is the so-called "Section 508" requirements of the **Work Force Investment Act**, which requires that all federal agencies use technology (including telephones and Web sites) that is readily accessible to individuals with all forms of disabilities. One way to determine if your Web site is accessible is a fee-based program called Bobby ([www.bobby.cast.org](http://www.bobby.cast.org)) that will diagnose your online accessibility to the impaired. Another is a free service called A-Prompt developed by the University of Toronto that can be downloaded for no charge from <http://www.aprompt.snow.utoronto.ca/>.

The other law is the **Voting Rights Act** of 1965, which requires non-English translation of all official election information if, generally speaking, more than five percent of a jurisdiction's voting age citizens do not speak English as their first language and possess limited English proficiency. Since information produced by a political committee or issue advocacy is not "official" information the law does not apply, although it is always a good practice to translate materials so that they may be understood by likely voters.

### What about state laws?

Individual statewide laws regarding Web privacy will govern your campaign's Internet activities, with the exception of the CAN-SPAM Act, which overrides all state spam laws. Typically, these statewide laws differ from state to state. Your campaign should actively research and follow any laws that pertain to Internet privacy in the state or states of your campaign.

## CREATE A PRIVACY POLICY

### How can my campaign adopt sound privacy policies?

Privacy policies tell your viewers precisely what your campaign is willing to do in order to protect the privacy and security of its donors and e-mail registrants. How will you uphold your privacy policies? What internal steps and procedures need to be developed to accompany your policy?

These should be standards that your campaign is capable of keeping; for, once contributors read your privacy policy, they will expect you to follow through

*Your privacy policy should be standards that your campaign is capable of keeping; for, once contributors read your privacy policy, they will expect you to follow through with it.*

with it. As you draft your privacy policy, make sure that your campaign has enough staff and resources to actively and regularly uphold its standards.

### **What should my privacy policy include?**

Your privacy policy should contain the following items: a brief description of your organization and its contact information; descriptions of the type of personally identifiable information collected on your site; explanations of how you will use that information and with whom you will share it; a list of choices concerning the collection, use and distribution of his or her personally identifiable information; and security procedures that your campaign uses to protect information from theft, misuse or alteration.

You may find that online contributors will demand to view your privacy policy before donating to your campaign online. For this reason, your privacy policy should be accessible to all of your Web site users.

### **You mentioned making my privacy policy accessible on my Web site. What is the best way to do this?**

When you design your Web site, put your privacy policy on a link that is one-click-away from your site's main pages, places where personal information is collected such as contribution pages and areas that collect e-mail addresses.

A common complaint from the public is that Web privacy policies are too confusing, too long or difficult to read. Create clear and easy to read descriptions that are simple enough for people from a variety of backgrounds to read and understand.

### **How can my campaign write a readable privacy policy?**

People who understand their topic usually can write clear, readable prose. Make sure that you understand the concepts that you want your policy to express. You may find it helpful to spend some time slowly brainstorming the precise security and privacy requirements that you want to include in your privacy policy. Read privacy policies on other Web pages, particularly other political Web pages, to gain a sense of what word choices and phrases make a privacy policy easier to understand.

Alternatively, your campaign may wish to participate in the World Wide Web Consortium's Platform for Privacy Preferences Project (P3P)—billed as a way for users to “gain more control over the use of personal information on the Web sites they visit.”<sup>13</sup> Through the program ([www.w3.org/P3P/](http://www.w3.org/P3P/)), Web sites answer a list of multiple-choice questions that cover all aspects of privacy policy. These answers present a snapshot of how each site handles the personal information of its users. Web sites then display this information in a standard format. P3P enabled browsers read this information and compare it to an individual user's set of privacy preferences.

*When you design your Web site, put your privacy policy on a link that is one-click-away from your site's main pages.*

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## FOLLOW THROUGH WITH PRIVACY PROCEDURES

**You mentioned that my campaign should come up with procedures to uphold my privacy policy. Where do I start?**

Typically, you will want to develop procedures that help you protect your constituent's personally identifiable information.

- Make sure your e-mail lists are secure.
- Remove people from your e-mail list when they request it.
- Make it a policy to refrain from spamming people with unwanted e-mail.
- Protect the information that your constituents give you over your Web site.
- Review your e-mail lists on a regular basis to be certain that all constituent information is accurate.
- If your privacy policy states that you will not share personally identifiable information with other organizations or campaigns, then do not do it. Period.

**Spam has become a big issue. How can I be certain that my fundraising appeals are not considered spam?**

Every time you communicate with supporters on your e-mail list, including the first time you send them an initial e-mail confirming their donation or inclusion on your list, you should provide a simple, easy-to-execute way for that person to unsubscribe from your mailing list. This may seem contradictory to your goal of reaching the largest possible group of supporters with the campaign's message. However, if you do not offer supporters this courtesy, then your campaign runs the risk of alienating some of your constituents.

**Why is e-mail list accuracy a privacy concern?**

Because accuracy is what makes your lists so valuable in the first place. Inaccurate supporter lists are worthless. Obtaining correct, up-to-date information enables your organization to know, for example, if an e-mailed fundraising appeal arrives in the right inbox and contains the right message. Verifying and correcting this information should be a required activity. One or more staff members or volunteers should be assigned to the task of regularly updating e-mail lists.

**You mentioned that it is important to protect e-mail lists. What does this entail?**

Though this topic is discussed at greater length in chapter one, protecting your e-mail lists involves a few basic steps:

- Guarantee that your databases are protected from theft or misuse.
- Store all information on secured computers.
- Monitor access to the lists in order to protect your supporters' privacy.
- Do not allow lists to be duplicated.
- Be careful when sharing your e-mail lists with others.

*Every time you communicate with supporters on your e-mail list, you should provide a simple, easy-to-execute way for that person to unsubscribe from your mailing list.*

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If your campaign chooses to donate, rent or sell its e-mail lists, ascertain that your privacy policies are upheld. Third parties must use it only for its originally intended purpose. One way to maintain trust with your supporters even if you share their e-mail addresses with others is through creating an opt-in or opt-out policy.

## SEALS OF APPROVAL

**I have noticed that some sites contain seals of approval for privacy. What are these seals of approval, and will they benefit my campaign?**

Privacy seal programs reassure visitors that your Web site will respect and protect their privacy, but they come at a price. These programs can take the form of a licensing agency, a committee of like-minded organizations or even an association of members. The specific form of the program is less important than its ability to perform three duties.

First, participants or members of the program must be subjected to some minimal level of qualifications in order to be eligible. Those eligible members would gain the right to display a recognizable seal of approval indicating endorsement by the program.

Second, in the event that a site's visitor wishes to lodge a complaint against a member or participant, an implementing body must provide steps for resolving the issue and hold parties responsible for poor practices.

Finally, if a settlement cannot be met, the implementing body must be able to revoke membership and force the Web site to remove its seal of approval.<sup>14</sup> A seal program can only be effective if its members agree to vigorously monitor compliance of their own as well as other member's sites. Organizations with seal of approval programs include the Better Business Bureau Online, TRUSTe, LinkExchange, CPA Web Trust, Pricewaterhouse Cooper's Better Web Program, Privacybot.com and ValidatedSite.com.

## CASE STUDY

Both the Bush Cheney '04 Web site and the John Kerry for President Web site contain privacy policies that clearly explain privacy issues to their visitors.

Bush Cheney '04 organizes its privacy policy (<http://www.georgewbush.com/PrivacyPolicy.aspx>) into six headings, each of which is stated in the form of a question that the average visitor may have about the policy:

- What information is being collected at GeorgeWBush.com?
- How is the information collected at GeorgeWBush.com used?
- Is my information secure?
- Can I change my information or opt out of campaign mailings?
- How do I contact Bush-Cheney '04, Inc.?
- Will this policy change?

Each question is answered in a series of bullet points. For example:

**Is my information secure?**

- **Protecting information you provide via GeorgeWBush.com.**

GeorgeWBush.com makes every effort to protect your information from the moment you begin to enter your information to when it is stored on our secure servers. GeorgeWBush.com uses a secure socket layer (SSL) – with the highest level of encryption commercially available – on pages where Web site visitors sign up for email news, become a Bush Team Leader, and make a secure online donation using their credit card.

Strict security measures are in place to protect the loss, misuse and alteration of any and all information pertaining to GeorgeWBush.com. In addition, GeorgeWBush.com is run on servers located in a secure server room and locked in a rack. Staff is onsite 24 hours a day, monitoring equipment and services.

- **Use of cookies and protecting your privacy:** We do make use of cookies to personalize and customize your interaction with GeorgeWBush.com and to provide you with the best possible online experience. A cookie is a tiny text file that is placed on your hard drive when you voluntarily register with GeorgeWBush.com or voluntarily take part in one of our online polls. These text files do not contain any personal information and can not be used by GeorgeWBush.com or anyone else to obtain any information that you do not voluntarily provide.

For Microsoft Internet Explorer, please visit:  
<http://www.microsoft.com/info/cookies.htm>

For Netscape Navigator, please visit:  
<http://home.netscape.com/security/basics/privacy.html#cookies>

- **GeorgeWBush.com links to other sites:** Our site may contain links to other Web sites and servers. Bush-Cheney '04, Inc. is not responsible for the content or privacy practices of linked Web sites; nor should a link from GeorgeWBush.com be construed as an endorsement of that site's content, services or practices.

*Source: George W. Bush.com Privacy Policy*

The John Kerry for President privacy policy ([http://www.johnkerry.com/footer-files/privacy\\_policy.html](http://www.johnkerry.com/footer-files/privacy_policy.html)) contains a TRUSTe seal of approval. It divides the information contained in its privacy policy in a similar manner to make it easily understandable. Categories include: how we use the information you provide, how we protect your information, how to contact us, unsubscribe from mailing lists, opt out or correct information and how we personalize your experience at JohnKerry.com.

For example:

**B) How we protect your information**

JohnKerry.com has state of the art, extensive security measures in place to protect against the loss, misuse or alteration of the information under our control. Our server is located in a locked, secure environment, with a guard posted 24 hours a day. Access to your information is granted only to you and authorized Kerry Committee staff.

Your privacy is important to us. By participating in the Council of Better Business Bureau's BBBOnLine(R) Privacy Program we have made a commitment to meet the program's strict requirements regarding how we treat your information and have it verified by BBBOnLine(R). Further information about this program is available at [BBBOnLine\(R\)](#).

JohnKerry.com is also a licensee of the TRUSTe Privacy Program. TRUSTe is an independent, nonprofit organization whose mission is to build users' trust and confidence in the Internet by promoting the use of fair information practices. Questions regarding this statement should be e-mailed to [privacy@johnkerry.com](mailto:privacy@johnkerry.com) or sent via postal mail to John Kerry for President, Inc., attn: Privacy, 519 C Street, NE, Washington, DC 20002. If you feel we have not responded, or your inquiry has not been satisfactorily addressed, please contact TRUSTe at <http://www.truste.org/>.

*Source: JohnKerry.com Privacy Policy*

## CHAPTER 6 ONLINE ADVERTISING

*Karen A.B. Jagoda*

The two most common elements of an online campaign tend to be e-mail and a Web site with rich media and plenty of interactivity. The third and least developed leg of an online political campaign is online advertising. This chapter will answer questions about political online advertising strategies and explore how online advertising can target highly desirable audiences during parts of the day that are otherwise impossible to buy or prohibitively expensive. These “day parts” are subsections of the broadcasting day, used to determine the cost of advertising on a radio or television program.

Moreover, online advertising can be used for reinforcement as well as persuasion, by bolstering fund-raising and get-out-the-vote messages received through other media.

### ONLINE ADVERTISING BASICS

#### Who used online ads in 2003?

According to Nielsen//NetRatings, Howard Dean and John Kerry were the first Democratic candidates in the 2004 presidential election to advertise online, with John Edwards following their lead a few months later.

In June 2003, Kerry’s campaign placed ads on Yahoo!, asking people to participate in an online primary being held by MoveOn.org. The Dean campaign followed in August with a series of ads on MSNBC that asked people to sign up to stay connected to his campaign. This particular media buy consisted of two sizes of ads: standard horizontal banners and skyscraper vertical banners. The *landing page* (the page where they “landed” after they clicked on the ad) included a passionate plea for people to join the Dean campaign by entering their contact information.

In October and November 2003, John Edwards became the predominant online advertiser among the presidential hopefuls. Washingtonpost.com, NYTimes.com and MSN were among the sites used by Edwards to help him educate voters about his stand on key issues.

In the 2003 California recall race for Governor, Garrett Gruener led the way with online ads. Gruener, a co-founder of the popular Internet search engine Ask Jeeves, spent nearly \$400,000 of his \$1 million budget on paid search, online ads and e-mail appeals to gain name recognition and support. He advertised on many of the local California newspaper sites, such as the LATimes.com, mercurynews.com (the San Jose Mercury News site) and SignOnSanDiego.com, a San Diego Union Tribune property. When asked why he advertised online, he said, “I don’t know if it was more effective than TV but we did not have the budget for TV. I know we drove a lot of people to our site.”

### **What accounts for candidates' and consultants' delay in embracing online advertising?**

Many political strategists dismiss the Internet as a communications medium because they think the Internet does not reach the “right” people. For them the Internet is seen as a tool for the younger generation who do not vote in the same numbers as, say, retired union members.

In a recent column in the New York Times, Frank Rich described the out-of-date reputation of the Internet among politicians:

In Washington, the Internet is still seen mainly as a high-velocity dissemination of gossip (Drudge) and rabidly partisan sharp shooting by self-publishing exco-riators of the left and the right. When used by campaigns, the Internet becomes a synonym for ‘the young,’ ‘geeks,’ ‘small contributors’ and ‘upper middle class,’ as if it were an eccentric electronic cousin to direct mail fundraising run by acne-prone members of a suburban high school’s computer club. In other words, the political establishment has been blindsided by the Internet’s growing sophistication as a political tool—and therefore blindsided by the Dean cam-paign.<sup>15</sup>

This is consistent with a 2003 survey by the E-Voter Institute of political and advocacy communication leaders, which showed that the biggest hurdle to using the Internet is that people believe it is not a “reach medium” and cannot be used to target specific voters.

At the same time, the E-Voter survey revealed that there has been a significant jump in interest levels regarding political online ads. Perhaps candidates and consultants are beginning to take heed of the Internet population surveys pub-lished by Nielsen//NetRatings. According to a survey they conducted in the summer of 2003, 144 million adults 18 or older have been online in the last 30 days—a number almost as high as the estimated 150 million registered U.S. voters. Among these online American adults, the Internet is increasingly becoming the most trusted source for news and information. Though many surf the Internet while watching television, studies show that hours spent watching TV are dwin-dling as people have more choices for getting information.

### **Is the Internet a persuasive advertising medium?**

Persuasion comes in many forms. It happens when people are persuaded to give money to a campaign, or send their e-mail address for future communication from the candidate, or even change their mind about a candidate or issue.

Politicians have long understood the persuasive nature of television and radio ads, yard signs and volunteers handing out literature or walking around the neighbor-hood. They also understand the ability of cable television ads to deliver targeted messages to specific audiences.

None of these modes of communication, however, give the viewer or listener a direct and immediate way to respond to a call to action, ask for more information or send money to a campaign.

But an online ad can turn persuasion into action. While a television commercial can tell you that a candidate needs your help, only an online advertisement can send a viewer directly to a Web site that accepts credit cards. A radio ad can fire you up to spread the candidate's message, but only an online ad lets you forward the message to your friends.

### What is actually bought in an online media plan?

There are a number of ways to buy real estate on Web sites in locations that will reach desired viewers.

- **Paid Search** – Internet search sites such as Google, Yahoo!, AOL and Microsoft's MSN have seen a jump in interest in paid searches. Ads are served up when visitors use a search engine to look for information about a candidate, race or issue. It is a way to connect with the core audience who has already identified themselves as interested and who are looking for information. Ads that appear in these environments are seen as less intrusive and more helpful than other forms of online ads.

Overall spending on the paid search market (on all kinds of advertising, not just political ads) was expected to reach \$1.6 billion in 2003 and is projected to reach \$4.4 billion by 2008, according to New York-based Jupiter Research, which tracks Internet trends. The advantages of this type of advertising are that it is clear that the viewer is interested in the specific topic addressed by the ad, the results are measurable and costs are relatively low.

- **Online Ads** – Banner ads with animation, photos or rotating text have been in use for many years. Most Web browsers can see them. Over time, sizes have changed, placements have been adjusted and creative tools have become enhanced. These banners are effective if placed on pages with high traffic and contextual relevance. Banner ads are relatively easy to buy, though the variety of sizes on different sites may require additional time to properly size the ad.
- **Rich Media** – Rich media ads are those that incorporate video, animation and sound and allow for more interaction with the viewer. Many require the most recent version of popular browsers, but as Americans upgrade their computer capabilities, the ability to view these ads is becoming more commonplace. Then again, so is the ability to block the pop-up variety of these ads.

The vast majority of businesses, government offices and universities have a broadband connection to the Internet, and 20 percent of the households in the U.S. also have high-speed connections. This provides an opportunity for political communications consultants to consider Web-based television-style ads with streaming video to be placed on popular sites.

*An online ad can turn persuasion into action by sending a viewer directly to a Web site that accepts credit cards.*

There are still challenges for rich media ads. Will they be seen as too intrusive? Will the viewer be able to manage the viewing and audio of the ad? Will the political consultants be able to apply their reach and frequency metrics to television-like online ads?

- **Text Ads** – Text only ads can appear on newsletters or on search engines. Sometimes the ads are highlighted by a light colored background but there are otherwise no graphics. These ad units are challenging because of the limitations in the number of text characters that can be used and the need to compete with the other text on the page.
- **E-Mail and Newsletters** – These ads appear as a text ad or banner within the body of an e-mail message. This technique provides good targeting, though the quality of the mailing list will ultimately determine the effectiveness of the ad message.

## COSTS

### What are some of the costs associated with online advertising?

Simple banners, buttons and text links are relatively inexpensive to create. Rich media banners can cost \$5,000-\$10,000 to develop, while television ads can cost as much as \$50,000. Repurposing media is one way campaigns are controlling costs, though the interactivity elements of the ad need to be fully developed in order to take advantage of the power of the Internet. Costs are measured in a unit called “cost per thousand.”

### What is a cost per thousand?

Cost per thousand (CPM) pricing for placement of online ads is dependent on:

- **Popularity of the site** – How many people does it reach?
- **Quality of the audience** – Are these people likely to vote?
- **Degree of targeting** – For example, women over 18 or women entrepreneurs between 45-60 who also have children.
- **Quantity of impressions being bought** – Buying a few hundred thousand impressions at the very last minute will cost more than millions of impressions planned over the course of the campaign.
- **Size and content of the ad** – Rich media ads with video cost more; small static buttons cost a lot less.

### What is an average price for cost per thousand?

In general, CPM pricing can range from \$1 to \$50 or more per CPM depending on all of the factors listed above.

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## TARGETING THE MESSAGE

### Where is online advertising usually placed?

Online ads can appear in a number of places throughout a site. Large Web publishers such as Microsoft, Yahoo! and AOL have some areas within their sites where they know exactly who is visiting, and other areas where they have a general idea of who is spending time looking for information or entertainment.

When someone signs up for an e-mail account, sites providing the service usually obtain a physical mailing address and credit card information. When the e-mail account is accessed, specific ads can be served to those individuals as they send and receive e-mail.

### How are online ads targeted?

Online ads can be targeted in essentially three ways:

- **Target by Individual** – Sites such as the NYTimes.com have strong targeting capabilities due to the fact that they require registration and have shown through independent research that their readers are very likely to vote. While their reach across the country may be relatively low, the penetration within the desired voting population is over 40 percent.
- **Target by Context** – People who go to local news sites are generally voters in those media markets. Visitors to financial sections on Yahoo!, MSN or AOL are most likely concerned about the economy and their own retirement. Trusted news sources such as CNN, ABC News, local television, radio and newspapers have increasingly shown they are attracting engaged citizens.
- **Target by Behavior** – There are ways to target visitors to some sites where there is little known about the exact person who is seeing the ad, but there is a great deal known about people like them based on Web behavior. This method of targeting is just now coming into the marketplace, and early tests will determine how accurate the predictive model is.

## MEASURES OF SUCCESS

### How can we measure success with our new online advertising program?

Before online political ads are launched, it is necessary to determine how the success of the campaign will be measured. Some ways to determine success include:

- Increased name recognition
- Lift in favorability in polls
- Dollars raised
- Traffic generated to Web site
- Number of e-mail addresses harvested

- Increased voter registration
- Motivated, loyal base of support
- Influence swing and independent voters
- Mobilization of volunteers
- Increased voter turnout
- Amount of press coverage of candidate's Internet ad activity
- Level of annoyance and number of complaints

*Strong evidence from studies done about online ads for consumer brands suggests that the majority of the people who do not click on ads are nevertheless influenced by the message.*

Some of these elements, such as dollars raised after a single online campaign appeal, are easily measured, while other measures of success are more elusive.

The most interesting measure for many is the change in poll numbers regarding favorability, which might be seen after an Internet ad campaign runs either alone or in conjunction with other media. This sort of activity can only be measured by surveying the audience of those who saw the online ads and those who did not.

The harder to measure component is whether a voter may have been influenced by an online ad, even though he or she did not click on it or otherwise interact with the message. Strong evidence from studies done about online ads for consumer brands suggests that the majority of the people who do not click on ads are nevertheless influenced by the message. More research needs to be conducted on the impact of the political online ads that are viewed and not clicked on.

**Some online ads seem to annoy people. Does this negatively affect the success of online advertising?**

Some might find it odd to consider the degree of annoyance as a measure of success. Traditional advertising to mass audiences increasingly requires that the message break through the clutter and interrupt the viewer. Techniques like buttons and banners are un-intrusive and as a result are not seen as being highly effective. Rich media banners that are larger in size, vertical skyscrapers, pop-ups or pop-unders and interstitials (ads that appear in between pages) provoke a higher level of annoyance and correspondingly have a higher level of effectiveness in studies done to measure recall and impact.

## **COMPARING ONLINE ADVERTISING TO OTHER MEDIUMS**

**Are there different legal rules for TV ads and Internet ads?**

Yes. Television ads for federal candidates require certain disclaimers and ask you to identify the source of the ad's funding. These items are not applicable to online advertising. However, requirements are sometimes complicated, so you should consult with an attorney or media buyer who is familiar with the rules. Similarly, rules regarding access, pricing and turn-around time to run ads also differ.

**How can a campaign use online advertising to enhance messaging through traditional media?**

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Many strategists have assumed that the Internet is not critical to the campaign and that the Web expert on the team can handle online ads, as well as other Web related activities. That viewpoint began to change in the virtual primary year of 2003, as presidential and state races began to think of the Internet as part of the larger picture. Still, online ad budgets were slim and the recognition of the potential power to enhance other messaging was missing.

No one is suggesting that online ads replace television or radio ads, yard signs or phone banks. Therefore, given that online advertising has the ability to optimize the message transmitted through other media inexpensively, campaigns should consider adding in a line item for online advertising.

### **What does the future hold for online advertising?**

Bipartisan Campaign Finance Reform has made it possible for soft dollars to be spent on Internet advertising in the last 30 and 60 days before a primary and general election, while restricting the use of soft money for similar television and radio ads.

How will the media strategists handle this challenge? It remains to be seen whether they divert money to television ads through creative campaign spending or use the Internet as a tool for reaching voters in those most important days before an election, when the majority of people decide how they are going to vote.

The pervasive use of cell phones provides another opportunity for political communications strategists to reach targeted voters. Though limited space on the screen presents creative challenges, the immediacy of the message may make them more compelling. Sending text ads to wireless devices, while intrusive, may also be a way to quickly raise money or mobilize voters on Election Day. We have seen explosive growth around the world for this type of communication.

It is expected that over one billion dollars will be spent in 2004 for communications by political campaigns. Approximately \$25 million of this amount will be spent on online advertising. But this amount will only increase as more and more Americans have access to a high-speed Internet connection and as candidates and their consultants understand the power of the Internet.

## CHAPTER 7 ONLINE EVENTS

*Ari Rabin-Havt*

Everyday, the online world bustles with events. Online discussions and radio shows, petitions, fundraisers and even online film festivals attract people from around the world. As a medium, the Internet made its users part of one of the most interconnected and busiest communities on the planet. Political Web sites are a large part of this landscape.

Since 1994, when Diane Feinstein launched the first campaign Web site, most campaign sites have served as virtual brochures and as inexpensive fundraising tools. Political organizations and campaigns have only begun to use the Internet to its full potential. Using Customer Relationship Management (CRM) database technologies and the flexible nature of the Web, campaigns can use the Internet to promote events that will drive both people and money to their Web sites.

### ARE ONLINE EVENTS RIGHT FOR YOUR CAMPAIGN?

#### What is an online event?

To begin, online events differ from typical events in the real world. Normally a campaign event, such as a rally, takes place in a set time and place. The online world is not constricted by these parameters. Certain events, such as petitions, would not be considered “events” in the real world. Online, however, they can become a major force, bringing people together. For the purpose of this chapter I will define an online event as any event designed to bring people together for a particular purpose through the Internet.

Many of the techniques used for online organizing are very similar to those used in the real world. Events on the Internet, however, are not limited by geography or size, only by the creativity of their creators. One of the first major online political “events” was the Black Page Protest sponsored by the Center for Democracy and Technology to protest the Communications Decency Act. During this event, Web sites changed their background color to black for 24 hours in a symbolic demonstration of what would happen to the Internet if the law went into effect and the Internet was censored. The action helped raise attention to the pitfalls of the Communications Decency Act among casual users of the Internet, not just the technically savvy.

#### How much does it cost to launch an online event?

Part of what makes online events so attractive is that they are usually cost efficient when compared to putting on events in the real world. As an example, the entire cost of Dean’s Internet tactics—including salaries and several large-scale online events—totaled about \$1 million and raised about one dollar for every nickel spent. By comparison, real-life banquets, which consume considerable monetary and staffing resources, usually have only a 65 percent return.<sup>16</sup>

*The entire cost of Dean’s Internet tactics—including salaries and several large-scale online events—totaled about \$1 million and raised about one dollar for every nickel spent.*

The cost and logistical challenges of online events have been diminished by the advent of planning tools, such as those provided on Meetup.com, a Web site that uses Internet-based tools to bring people together for face-to-face events. Over the past year, Meetup.com has become a prime spot for finding local supporters from many campaigns—Republican and Democrat alike. Campaigns have even touted their Meetup numbers as a sign of strength.

### How many types of online events are there?

Online events run a gamut. Recent examples of successful online events include signups for real world events, contests, petitions, fundraisers and film viewings.

To illustrate, MoveOn.org recently allowed their members to plan house parties to view a documentary about the Iraq war through their Web site. Members could use the site to search for parties in their area and donate to Moveon.org. Each of these house parties participated in a conference call to discuss the screening. Prior to the creation of the Internet, a national event such as this would be a logistical nightmare. Now, a creative database can do most of the work.

In the spring of 2004, Bush-Cheney '04 launched its own version of the house party. Called “Party for the President” Day, the event was designed so that Bush supporters could increase support and fundraising in their communities. Party hosts signed up at the campaign Web site and received a special package filled with a video, bumper stickers and campaign materials. House parties for which five or more people RSVP'd online were included in an exclusive conference call with Vice President Cheney, who answered questions and briefed partygoers on the progress of the campaign.

Petitions have become the simplest online event and are most often used as a starting off point for fundraising solicitations. Using petitions and creating buzz is how MoveOn.org built their organization, starting with the initial “censure and move on” campaign.

Earlier in 2003, the Fair and Balanced PAC hosted one of the fastest growing petitions in the history of the Internet, which asked US voters to symbolically support a recall of President Bush. Hundreds of thousands of people participated in this online event and provided this PAC with a huge e-mail list for future fundraising purposes. In 2004, Rightmarch.com used a different issue, the large amounts of soft money accepted by liberal-leaning organizations like Moveon.org, to launch a petition that allowed supporters to contact the FEC, as well as their Senators and Representatives to “Stop Moveon.” By engaging voters initially with this non-fundraising event, both the Fair and Balanced PAC and Rightmarch.com increased their fundraising potential.

### What ingredients are necessary to produce a great online fundraising event?

If there is one magical ingredient to a successful online event, it is a good e-mail list—good in both quantity and quality. Simply put, organizations with larger e-mail lists will be able to attract more participants to an event. Very few

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*Building a good e-mail list is not just about gathering a lot of names. You must cultivate this list by engaging your supporters in an issue that generates genuine excitement or passion.*

organizations immediately boast huge e-mail lists, and more often than not, most political campaigns start off with only a few core supporters. Well-planned online events that build on the enthusiasm of a small core group of supporters can help build your list. Placing these events at a time of media attention can grow a campaign in immeasurable ways.

The quality of names on your e-mail list is equally important to holding a successful online event. For example, a list of 1,000 dedicated volunteers who signed up on your Web site is more valuable than a list of a million non-supporters bought from a list vendor. The value of a strong e-mail list simply cannot be underestimated. In addition to an army of foot soldiers ready to volunteer at real-world events, a good e-mail list can provide campaigns with valuable fundraising sources.

Keep in mind, however, that building a good e-mail list is not just about gathering a lot of names. You must cultivate this list by engaging your supporters in an issue that generates genuine excitement or passion. When MoveOn.org encouraged its members to call the Senate regarding the War in Iraq in March of 2002, they were so successful they almost shut down the phone system of the Capitol. They accomplished this, first, by careful planning (MoveOn.org members were scheduled to call their Senators at a specific time) and second, by building on an issue which elicited strong feelings. Had all the members called the Capitol at the same time rather than making the phones ring off the walls all day long, it is unlikely they would have elicited the media attention. Similarly, had MoveOn.org based its Virtual March on Washington on an issue of less interest, such as the privatization of Uranium Enrichment facilities, they would not have attracted as many members.

## ONLINE VS. OFFLINE EVENTS

**Can I use online events to cultivate my supporters?**

Yes, online events are the ideal way to help cultivate your e-mail list, and reach beyond the core of supporters who are willing to attend a dinner or rally. An online petition is one of the most common events used to cultivate a good list.

The Dean Campaign used this tactic when it allowed its supporters to decide what the campaign would do with its revenue: forgo the public financing system for the Presidential campaign or accept it and limit spending. The campaign sent an e-mail to supporters informing them that an important e-mailed message was on the way. They called it the most important e-mail of the campaign thus far. By conducting a poll of the campaign's supporters, Dean generated a level of excitement around the decision.

Another good use of the Internet is to offer recognition and praise to reinforce real world activities. During 2003-2004, the Bush and Kerry campaigns advertised their fundraisers and donors on their Web sites.<sup>17</sup>

**Online events seem so isolated from the press. This appears to be a disadvantage because campaign events in general tend to generate a lot of earned media. Can I expect any press coverage if my campaign plans an online event?**

Yes. There is a moment when many campaigns achieve a “Warholian fifteen minutes of fame,” in which both the press and the public are focused on the candidate. It is at these junctures that campaigns can use online events to build grassroots support and then cultivate that support into fundraising dollars.

As the second quarter came to a close, the Dean Web site used the image of a bat to measure fundraising. This symbolic gesture, which encouraged supporters to fill up the bat with their donations, created an online event focused on the end of the third quarter. People on Dean’s e-mail list began to receive almost hourly e-mails updating them on the progress of the bat. Supporters repeatedly checked the Web site to monitor the bat’s progress. Almost immediately an online event was created around the simple bat logo.

Joe Lieberman’s campaign successfully used a similar technique. He asked supporters on his e-mail list to help fill up “the Joe Mobile,” an effort that netted more than \$300,000 for his campaign. Earlier in the quarter Lieberman had also used another event to capitalize on the amount of press that he was receiving. To mark the anniversary of the Supreme Court decision that gave President Bush Florida, Lieberman asked his supporters to fill a graphic of the state of Florida by contributing approximately \$1,000 for each vote he and Al Gore had lost by in 2000. His fundraising was boosted when Al Gore endorsed Howard Dean in the middle of this event, yielding some sympathy donations for Joe Lieberman.

*Online events, such as petition drives, are excellent ways to keep your e-mail list fresh, raise awareness about your campaign, gain supporters and eventually raise money.*

### **Can I host quarterly fundraising events online, the way I do with real world events?**

Quarterly online fundraisers can be successful. This is illustrated by an event held by the conservative group Free Republic—an organization with more than 100,000 members and a \$240,000 yearly operating budget. In order to raise the necessary funds each quarter, the organization’s founder, Jim Robinson, posts a fundraising “thread.” The thread solicits donations, pledges and monthly donors. As various “freepers”—short for Free Republic—donate money, they are recognized and thanked. Conversation on these threads continues until the \$60,000 required to run the organization that month is raised. This process usually takes a little longer than a week, and by the week’s end the Web site has been funded for the quarter. While the “freepathon” is unique to Free Republic, other organizations and campaigns can utilize its model for online fundraising events by explicitly showing a need and then building a sense of community around meeting that need.

### **What else do I need to know about online events?**

When planning an online event, a campaign may feel the need to choose between an event that builds net-roots support or that raises money. This is a false choice. Very often campaigns want to solely focus on fundraising, but doing this is putting the cart before the horse. By first concentrating on building your campaign’s e-mail list and then using that list for fundraising you get the best of both worlds. Once you have a good e-mail list your work is not done. Online events, such as petition drives, are excellent ways to keep your e-mail list fresh, raise awareness about your campaign, gain supporters and eventually raise money.

## CHAPTER 8 PROMOTING THE CAMPAIGN

*Contributed by Marie Woolf and Julie A. Barko*

*Remember that in both online and offline campaigning, focus should remain on your candidate—the only tangible “product” of the campaign.*

One summer day during the 2000 Presidential campaign, Senator Orrin Hatch, a dark horse Republican candidate, launched what he believed was a pithy, persuasive, and potentially lucrative fundraising appeal. Hatch’s “skinny cat” campaign had a simple premise: if one million supporters each donated \$36 to Hatch, the campaign could compete with George W. Bush’s fundraisers, who reported raising \$36 million that summer.<sup>18</sup>

As Hatch said in one interview, “George Bush has the fat cats. I want the skinny cats,” reflecting how small the donation he requested from his donors was compared with the large \$1,000 donations the Bush campaign raised from its supporters.<sup>19</sup> He even used the Internet to frame his fundraising appeal: supporters could join the skinny cat campaign by donating on Hatch’s Web site.

Based on Hatch’s ultimate goal of raising \$36 million dollars, the skinny cat campaign was a failure. It raised only about \$1 million, approximately \$160,000 of which was contributed through Hatch’s Web site<sup>20</sup>—an inefficient amount to run a successful campaign for the Republican nomination against Bush.

Four years later during the 2004 presidential campaign, fundraising on the Internet exploded. The exact grassroots fundraising model Hatch used, which was branded as quixotic in 2000, was cheered in 2004 as a model for generating an unprecedented surge of public support, political fundraising, and online campaigning.

### BUILDING AN ONLINE COMMUNITY

**Why should I promote my fundraising campaign online?**

E-mail campaigns, Web site design, viral marketing, online advertising and online events are all Internet tools that allow you to target carefully composed fundraising messages to specific constituencies. But, in order for these tools to be successful, you must first promote your online campaign.

The Internet’s effectiveness as a fundraising tool increases as your campaign integrates its offline and online activities into one cohesive fundraising effort. Remember that in both online and offline campaigning, focus should remain on your candidate—the only tangible “product” of the campaign. Cohesiveness in promoting your candidate’s message is an essential component of each. Each piece of the campaign should be integrated with the next, so that your campaign builds its own campaign structures through both its online and offline activities.

**On a basic level, what does this entail?**

During the 2004 presidential election, campaigns promoted their offline events through their online activities—and vice versa. A campaign blogger (someone who posts comments on a Web log), for example, would announce the next campaign event in the daily posting. The blog might contain links to a Web page so that people would sign up for the event, suggestions for contacting local press about the event or easily forward-able e-mails to send one's friends and family about the event.

Campaign supporters then logged on to the site, read about the upcoming event, discussed the event with each other through blog posting or in campaign-related discussion groups and promoted the event in their communities through e-mails and word-of-mouth. At the event, campaign staff and volunteers enlisted supporters for their mailing lists. Later in the evening, supporters flocked to the Internet to discuss the day's activities and plan for the next event.

## **MAKING YOUR CAMPAIGN DONOR-FRIENDLY**

**I want to promote our new fundraising program to our donor base. How do I accomplish this?**

Make each donor or friend of your cause feel as though his or her interest, participation or contribution plays a unique and important part in your organization's success. Donors like to feel as though their contributions count. Supporters like to feel as though their enthusiasm, engagement and volunteerism make an immediate difference. When people feel invested in your cause and that their assistance matters, they are more likely to contribute.

Building their trust and showing them how their contributions help will make a difference. Cultivate their enthusiasm by communicating with them on a regular basis about your campaign activities, successes and challenges—without always asking for a donation. After fundraising drives or events, follow up with your constituency by detailing your—and their—successes. Make them feel as though they became part of your campaign team by contributing to your campaign.

**How can I cultivate donors online without overwhelming them with too much information?**

Keep in mind that your communications, updates and contacts should be brief, to the point and informative.

Tailor your message to your audience. If a group of donors raised enough money to run a full-page advertisement in the Sunday newspaper attacking, for example, the proposed building of a dam, follow-up with that group by e-mailing them an electronic version of the advertisement and a letter about how effective the ad was. If a group of college students volunteers to work in a phone-drive to raise contributions, send them an e-mail about how much money their efforts raised and how it went to good use.

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## ADVANCED TECHNIQUES: PROMOTION ON SEARCH ENGINES

### How do I begin promoting my Web site?

Most Web users rely on search sites, such as Google, MSNBC or Ask Jeeves, to direct them to the products, services and information that they go online to seek. The top sites listed receive the majority of click-through traffic. Regardless of how wonderful a campaign Web site is and how much time is invested in initial search engine optimization, the ultimate results cannot be achieved without intense maintenance efforts.

*Search engines create more awareness about individual Web sites than all other advertising combined because they give ordinary people direct and immediate access to your homepage and fundraising appeals.*

### Why should I promote my campaign on search engines?

Search engines create more awareness about individual Web sites than all other advertising combined because they give ordinary people, who may not normally visit your site, direct and immediate access to your homepage, press releases, social networks and fundraising appeals. As an Internet promotional strategy, *search engine positioning* (SEP), the act of getting your Web page placed as far up on the list of topic-related sites as possible on a search engine, is an increasingly essential part of every online toolbox.

### How can I use search engines to promote my organization?

Building a long-lasting and successful search engine campaign requires extensive planning, research and, above all else, maintenance. While it was once thought that simply submitting a Web site to multiple research engines was enough, experts now agree that site optimization and continuous positioning practices are invaluable for building site traffic and awareness.

The ideal SEP program helps your campaign design the content of its Web site so that it achieves greater search engine placement. Frequent site maintenance is required so that your site stays current with new search engine technologies, which constantly consolidate and improve. Because many search sites are available, submission techniques and trends must be researched continually in order to provide campaigns with expert recommendations for conquering the complicated search engine network.

### **This sounds like a lot of work. How can my campaign stay on top of all of these regular search engine changes?**

SEP firms assist campaigns, non-profit organizations and for-profit entities in researching their audience base. They can help make an organization as visible as possible to the right search engine users. Preparing a Web site for optimum search engine placement requires careful planning on the part of both the campaign and its agency or consultant. Outsourcing your search engine plan to an agency can force the campaign to define its Web site objectives and audience, creating an intuitive and search engine-friendly site through professional analysis and consultation.

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Optimum results occur over time, as your organization closely studies Web traffic, makes its site search-engine friendly and uses positioning techniques.

Many SEP service firms use automated software to submit Web pages to search engines. While this may be a simple, timesaving practice, it can cause the Internet campaign endless problems. Although many search engines do not publicize their submission restrictions, they do set limitations. The consequences of exceeding these limits, even by one page, are severe and may include banning the IP address from which the submission is sent.

As you search for an agency to assist in promoting your Web site through search engines, keep in mind that a qualified Internet campaign specialist should provide the following services:

- **Submission Reports**, which include screenshots of submissions and confirmations, fees, targeted search engines, directories and categories to which the site was submitted.
- **Positioning Reports** on each search engine for each targeted key word.
- **Analysis of Log Files** to determine popular keywords and top referral sites.
- **Site Edits**, such as design and META tag improvements, to advance search engine ranking.
- **Visibility Reports** containing positioning reports, recommendations for improving rank, graphs and charts to visually display activity, log file analysis and up-to-date search engine information.
- Building an **Extranet** for communicating relevant search engine positioning (SEP) information.
- **Links** to articles on search engine trends.
- **Recommendations** for site edits aimed at improving search engine results.
- **Message boards** for quick responses to SEP questions.
- **Contact information** for all campaign and Internet team staffers.

Directories are notorious for not allowing submissions to be edited. Therefore, if a firm that practices automated, bulk search engine submission lists your site in the Yahoo! Directory in the wrong category or with an ineffective description, it is likely that a campaign will be stuck with that listing, and the qualified traffic the site receives will be far less than desired.

### **What technical requirements will help me promote my campaign on search engines?**

One placement device is something called keyword META tags. Some of the most important information contained on your campaign's Web site is never seen by viewers. META tags—information contained in the header portion of a Web page that aid in that page's classification by search engines—can help boost a Web site's search engine rating, increasing the odds that an interested user visits your site, thereby increasing your chances of gaining much needed contributions.

There are many various types of META tags. Below is an introduction to a few of the most relevant to online fundraising:

- **Title Tags** – Title tags are displayed in the upper left hand corner of the user’s browser when they visit your page. If you visit ipdi.org for instance, the Institute’s name bearing title tag will be displayed in that location. But title tags also play an important role in gaining visitors to your site. First, your title tag is used as part of a formula used by search engines to rank your site. Its importance varies according to the individual search engine. Second, all major search engines will display the text of your title tag in the description of your page. If the text of your title tag catches a user’s interest, your site will receive more hits. These hits may translate into more contributions.
- **Description Tags** – META description tags are never seen by your Web site’s visitors, but they may play a significant role in determining whether a visitor comes to your site in the first place. If a search engine supports description tags, it will typically display between 200 to 250 characters. With that in mind, it is important to keep description tags short, interesting, and punchy.

META tags are not supported by all search engines, and they are only part of the equation in many of those that do take them into consideration when producing results to a user’s query. Nevertheless, put some time into creating an effective META tag for your Web site. This may not win you the campaign, but a few extra hits can translate into a few extra contributions. And what campaign couldn’t use a few extra contributions?

Over time, search engines realized that the data contained in the keyword META tags often did not reflect the submitted content site. They have recently placed less importance on keyword META tags. Some search engines have created algorithms that qualify META data by checking it against other factors, such as body text, image ALT tags, links, file names, page titles, and headings.

In order to ensure that searchers locate your campaign Web site, pay particular attention to keyword repetition limits, description character limits, placement and organization of keywords in the META tags and Web page content. Additionally, Web site content should be well represented in all aspects of the Web page design and code, while meeting the specific submission requirements of each search engine and directory.

### **What else should I keep in mind?**

Something called *search term selection* is the foundation of every SEP plan. A Web site must be optimized for the specific terms that searchers are likely to use when trying to locate its key features: namely, the candidate and campaign organization.

Start by defining primary and secondary search terms. Primary search terms are phrases, such as health care policy or Smith Reelection Campaign, that target a specific audience and accurately describe the candidate and campaign, while secondary search terms are often more vague, searched less frequently or describe a secondary set of services, for example, fundraising for candidate X. Once

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selected, search terms become the starting point for optimizing a Web site for qualified search traffic. The primary search terms are tracked with various search sites, and rankings are delivered in visibility report graphs.

Advanced submission and positioning techniques, while not recommended for all campaigns or those with very limited budgets, are more effective than automated bulk search engine submission. They typically include the following:

- **Gateways** – Pages that provide links to all of the pages on a Web site. If a link on the home page to the gateway is provided, in theory, the spider will follow the link and crawl the entire site, giving higher relevance to the pages because it found them on its own.
- **Doorways** – These pages are specifically designed for maximum search engine placement for a specific keyword and are linked to the actual pages where the products or content would usually be viewed.
- **Site Theming** – Theme-based search engines pull out data from several areas of a Web site, including META tags and file names, and index the site as a whole. These engines take into account the manner in which pages are linked and the location of the keywords.
- **Edited Dynamic URLs** – Dynamically generated pages often create problems for spiders, which usually do not follow links with URL encoding of form variables. This may result in product pages not appearing in certain search engine results.

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## CHAPTER 9 WEB VIDEO

*Dan Manatt*

Political Web video, like the rest of ePolitics and the Internet in general, has an amazingly short and rich history. Within a few years of the advent of Web videos in 1995, Political Web video milestones were already being set:

- 1997: C-SPAN begins live Web casting of Senate and House proceedings.
- 1998: The National Rifle Association launches NRA Live, the first multimedia political media outlet.
- 1999: Steve Forbes becomes the first candidate to announce his candidacy in a live Web cast.
- 2002: The first high profile Web attack ad, “Social Insecurity,” is launched by the Democratic National Committee. The Flash cartoon lampoons George W. Bush’s proposal to partially privatize Social Security. A measure of its impact: The Republican National Committee condemns the ad, and CNN and other national media outlets cover the ad as if it were a television ad.
- 2003: MoveOn.org holds its “Bush in 30 Seconds” TV Ad contest, using Web video on an unprecedented scale to generate membership, press coverage, funds and buzz.

In the 2004 election, with Web video’s increasing use by the wired public and the increasing bandwidth in American homes and offices, it is becoming an integral part of political Web sites. In fact, with just one exception, every major presidential candidate in the 2004 election featured Web video on his or her campaign site.

But, surprisingly, Web Video does not come with a presidential price tag. To the contrary, you can buy all the equipment you need to produce Web Video for less than \$1000. And, as explained below, you can put Web Video on your site for \$0.

Below is a crash course—from strategy to practical tips—on Web Video.

### WEB VIDEO TECHNOLOGY AND THE INDUSTRY

**Web video seems like an expensive and highly technical endeavor. Is it a worthwhile investment for small or even medium-sized campaigns that lack the budgets and coffers of a national presidential race?**

Orson Welles famously said that moviemakers were the only artists who could not afford the tools of the craft. This is no longer the case. Digital video and editing technology has lowered the cost of moviemaking down to thousands of dollars. In the case of Web video, distribution—usually the most costly part of mass communication, from films to political spots—costs just dollars or only pennies. In fact, between digital video production and high speed Internet, the technology is already in place to deliver DVD quality video-on-demand.

But television is such a popular media—with proven results. How will Web video change the way campaigns or non-profit organizations are run?

Reports that Web video will kill TV advertising are vastly exaggerated. Web video will not transform politics overnight any more than any other aspect of the Internet has. Too many Americans lack the technology, technical skill or political motivation to use, much less seek out, political Web Video. Even so, there is a “Web Video Demographic”—people who are moderately tech-savvy with moderate to high-speed Internet and the motivation to seek out, stream and/or download and watch Web Video.

Who does Web video reach?

For most campaigns, Web Video is a pull medium to reach your *wired supporters*. At best, it may have a marginal ability to reach *persuadable voters*, via email forwarding by your supporters. It is also an important way to reach *reporters*.

*Producing good Web Video is as simple today as taking a good photograph, and it requires only moderate training.*

## PRODUCTION REALITIES

What kinds of costs does Web video require?

The basic Web video “barrier to entry” is neither cost nor technology. Rather, it is skill.

Producing good Web Video is as simple today as taking a good photograph, and it requires only moderate training. But because the technology is still new, it will take some time for the skill set to become widespread (probably until the current college crowd graduates and/or people take enough videos of their kids). In time, being skilled at videography will be as common as being skilled at photography.

If Web video is still very much a medium of the future, how can I use it for a campaign today?

For now, if you want to use Web video, you have three choices:

1. Find an *Internet Video consultant* who specializes in low cost, high quality Web video (of which there are exactly two, to the best of my knowledge and belief, including myself).
2. Have your *Media Consultant* produce your Web Video at broadcast TV prices.
3. *Do it In-House*. Find, train, and/or task one of your staff members—your IT staffer, deputy press secretary, or camera-savvy volunteer—to do the job in house.

What are some tips for creating great Web videos?

Below are some of my best tips and techniques for creating Web videos for many occasions—not just as a high-tech request for contributions.

*Every political Web video is a fundraising video, either overtly, by including a video “ask,” or implicitly, by building community and providing content “value” to supporters.*

1. **Fundraising Videos** – Every political Web video is a fundraising video, either *overtly*, by including a video “ask,” or *implicitly*, by building community and providing content “value” to supporters, thereby winning their loyalty and encouraging donations. HowardDean.tv smartly had a 10 second video play automatically when users logged on with upbeat music and bright graphics urging viewers to “contribute today.”
2. **Campaign Video** – Make your campaign video an uber-Web video. This can be accomplished by creating a single 5-10 minute piece that lays out the candidate’s platform, campaign themes and biography.
3. **Ads** – Posting your TV ads on your Web site is a minimum (though not universally followed) best practice for political Web video. It has also become one of the best Web video fundraising tools, as campaigns and groups hold fundraising drives and/or contests to determine and/or fund broadcast ad campaigns—such as the Moveon.Org “Bush in 30 Seconds” campaign.
4. **News** – Earned TV media is great—unless supporters aren’t watching. Today, campaigns are giving TV stories longer life by creating online archives of TV appearances and news stories, multiplying the value of earned media exponentially.
5. **Videos for Meetups & House Parties** – The 2004 presidential campaigns not only capitalized on Meetup.com’s online/offline event, but added a terrific Web video twist: it posted video greetings from Governor Dean on the Internet for downloading, so Dean’s Meetup.com participants could hear specialized video messages from the candidate—including fundraising pitches.
6. **Video Journals/vBlogs** – Video Journals, episodic videos of the candidate campaigning, are Web video’s answer to the campaign documentary or the blog. Donors and supporters love them (if they are not too long and boring).
7. **Policy/Issue Videos** – The policy or issue video features the candidate speaking on a specific topic, often with b-roll or graphics reinforcing the message. It is Web video’s answer to the Ross Perot infomercial.
8. **Event Videos** – The most common video—along with ads. Event videos are speeches or other events videotaped—and hopefully edited.

## **WEB VIDEO ON THE CHEAP: A BUYER’S GUIDE**

**What are some suggestions for investing in good Web video technology at an affordable price?**

Converting broadcast Video/VHS: If you want to convert VHS or other tapes, there are several inexpensive packages to digitize video, such as Dazzle Multimedia Hollywood Bridge (\$199).

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Producing Digital & Web Video: If you want to shoot and produce your own content, you will need to spend between \$600 and \$5000 for some combination of the following equipment/software:

1. **Digital Video Camera** – Mini DV cameras run from under \$400, such as the Canon ZR60, to the high end XL-1s, which can be found for about \$2,500. Key cost factors are image and lens quality, audio inputs & microphone, frame rate/format. Spend an additional \$300-500 for a decent microphone or, better still, a wireless microphone package, such as the Sennheiser Evolution (\$500) and \$20-\$100 for a simple countable video light.
2. **Editing Software** – Editing software actually comes free with Windows (Movie Maker) and Apple (iMovie) and can do basic videos quite acceptably. But for graphics and other added production values, you may want a few more features from the industry-standard Adobe Premiere (\$339), Apple Final Cut Express or Pro (\$300 or \$880), or Avid DV Xpress DV (\$700).
3. **Compression Software** – Web video should be compressed to the smallest file size practicable given your audience’s bandwidth; the video editors may output in Windows Media or Quicktime, but third party compression software is both necessary and affordable. Try Realplayer Helix (PC) \$195 or Cleaner 6 (Mac) (\$200).
4. **Reference** – Make sure one of your staffers—perhaps a talented volunteer, your Internet staffer, or a deputy press secretary—learns Web video basics and reads manuals or other references, like Digital Video for Dummies (\$18).
5. **Web Video for \$0** – No money or talent to produce video? No problem. There is still the cheapest Web video program of all. If a media outlet posts video of your candidate or issue on their site, simply link to it.

## TOP 10 RULES FOR WEB VIDEO

1. **Be Brief and Do Not Bore** – The typical campaign Web video is modeled on a C-SPAN event: long, unedited, and dull. That may be good enough for your political junkie supporters, but will put all others to sleep. For most of the world, the paradigm should not be C-SPAN but CNN, ESPN, and MTV.
2. **Multi-Market Your MultiMedia (especially via email)** – Posting a video on your site is not enough – you have to market it on your site, through emails, even in offline advertising. Ideally, send HTML emails with screen shots of your video and links directly to it. Enable supporters to e-mail forward your videos.
3. **Multi-Purpose Your Multimedia** – Digital video can be multi-purposed in many ways to make it more cost-effective. You can pull stills from your video for your Web Site or brochures; if your video is high quality DV, it will be sufficient quality for your ad consultant to use as b-roll for ads, etc. Your in-house videographer can double as “tracker” for your opponent.

4. **Timing is Everything** – News-related video content is like all news: if it misses its news cycle, it loses value and impact. So post time-sensitive videos as quickly as practicable. On the other hand, some content stays fresh indefinitely, such as a campaign video, major event, kickoff speech and most ads. Know the difference.
5. **DVD, not TV, is the Model** – Web video should emulate a DVD, not TV, in multiple ways. First, video-on-demand, not costly live Web casts (a.k.a. appointment television), should be the model. Second, if you post a long video, at least break the event up into chapters, giving users the choice to either watch the entire event or specific sections/highlights.
6. **Multimedia Means Integrated Video, Audio and Text** – Multimedia is more than just Web video. Either embedded in a video or within a video player template/skin, include hotlinks to PowerPoint, transcripts, other sites, etc.
7. **Lights, Camera, Audio . . . and Minimal Production Standards** – Four things that kill Web video (in counterintuitive order of importance) are bad audio, bad lighting, bad exposure and bad focus. Buy a book and learn the basics, then get a cheap light and wireless mike.
8. **Get Real, Get Quicktime, but definitely Get Windows Media** – Face reality: Microsoft has engineered yet another monopoly with Windows Media. So if you are not streaming in Windows Media, you are losing significant audience share. The only time you should use a non-major player: get an auto player for fundraising videos.
9. **Use Fair Use, But Use it Carefully** – In the post-Napster world, online content copyright is a sticky subject. Common practice for now is that candidates can reproduce video clips about themselves on their websites. But there is no legal precedent testing this one way or the other, so do not be surprised if you get a cease and desist letter from the news media.
10. **And the First Shall Be the Last Question: Do You Have a Web Video Constituency and Candidate?** – Ask yourself the threshold question: do you have a Web video Constituency and Candidate? Web video only works if you have a campaign that will generate Web video and an audience to watch it. Therefore before buying a camera or editing software, conduct an honest assessment: does your constituency have high speed Internet and, just as important, the know-how and motivation to watch Web videos, or is it a low-tech demographic, such as a retirement community? Will your campaign and candidate stage interesting events and run TV ads, or is your candidate a 20-year incumbent who will run a pro-forma campaign? Realistic answers to these questions will determine whether a Web video program is worth the effort and expense.

## CHAPTER 10 HARDWARE AND SOFTWARE NEEDS

*The Institute for Politics, Democracy & the Internet*

Using the Internet, a technical medium, to launch or support a fundraising campaign necessitates a number of equipment, software and upkeep requirements. Though many of these services can be outsourced to private firms, the key to keeping expenses down lies within your own organization. With a minimum amount of technology—often little more than you may already possess in your home office, at your work desk, or even on your Palm Pilot—your organization can be equipped to fundraise online.

Keep your budget in mind as you design your fundraising plan. Many technological requirements, such as equipment and software, are sold at different prices and can often be purchased in packages. Use the Internet to research, price and read customer opinions about equipment before buying anything. This will allow you to tailor your purchases to meet the needs and budget of your campaign.

A basic online fundraising operation should include, at a minimum:

- Pentium III computers with printers for key staff.
- A good digital camera.
- Broadband Internet access for the campaign headquarters.
- Database software list for management.
- An e-mail list provider for people who sign up on your Web site.
- A company to provide the campaign Web hosting, domain names, and e-mail boxes.
- A secure system to process contributions and sign-ups.
- Someone to design the Web site and assure connectivity with the campaign database and other components of the online operation.

Many of the technical aspects of your campaign, such as designing and updating the Web site, can be outsourced for a price. Security and maintenance costs, in particular, tend to be one of the most costly expenses of running an Internet campaign in terms of both cash and human resources. However, they are also the most important. We recommend that your campaign acquire expert assistance to install and contract with a secure server, which is particularly imperative for fundraising on the Internet. Secure servers encode communication in both directions and consequently guard against theft or misuse of your supporter's credit card numbers and personal information.

One further requirement lies not in equipment or technological expertise but in knowledge about fundraising laws and regulations. Political campaigns must be consistently and thoroughly observant of the restrictions that they may face. For this reason, your campaign should not commence its fundraising operation without first researching national, state and local laws. As discussed in the introduction, under federal law, contributions that are donated to a political campaign through any medium, including the Internet, must also obtain required information about the donor.

*Use the Internet to research, price and read customer opinions about equipment before buying anything. This will allow you to tailor your purchases to meet the needs and budget of your campaign.*

## CHAPTER 11 EVALUATING SUCCESS

*Phil Nash, Emilienne Ireland and Becki Donatelli*

As other chapters in this primer suggest, Howard Dean, the former governor of Vermont, was far and away the best Internet fundraiser in 2003. He raised over \$40 million online, a new record, and signed up over 180,000 people to come to his regular Meet-Up gatherings. (He was eclipsed in 2004 by John Kerry, who set new all-time high online fundraising records.)

*Don't forget that a Web site is simply a strategic plan that you implement in code. Start with strategy and evaluate your success with strategy, not just statistics, in mind.*

Dean's online efforts, however, did not translate into offline votes in the Democratic primaries in early 2004. Despite his certified successes throughout 2003, he was forced to drop out of the primary race by February 2004 after a series of stinging losses.

While political scientists and historians will be debating for years about what brought down the Dean candidacy, its main cautionary message is clear: don't forget that a Web site is simply a strategic plan that you implement in code. Start with strategy and evaluate your success with strategy, not just statistics, in mind.

Too many people get hung up on the numbers of donors, visitors and volunteers who come to their Web sites. They forget that the Internet is a visitor-driven environment, so both the satisfaction of the visitor (with the information or inspiration received) and the satisfaction of the candidate (with the number of dollars or volunteers collected) must be a success.

*For a Web site, the three factors that are easiest to quantify are the number of visitors to your site, dollars raised online and volunteers who sign up to help.*

Also, never forget that online campaigning is just one part of the overall campaign. Strive to be as successful as possible in your online efforts, while creating as much synergy as possible with your offline campaign.

### ELEMENTS OF A SUCCESSFUL CAMPAIGN

#### How will I know if my campaign Web site is a success?

For a Web site, the three factors that are easiest to quantify are the number of visitors to your site, dollars raised online and volunteers who sign up to help.

Other ways to evaluate a site include whether or not it is easy to use, whether it provides information that visitors are looking for, whether it saves time and effort by your staff members and whether or not it provides a persuasive statement of your campaign's message. Let's explore each of these in turn.

#### How do I track visitors to my Web site?

The most accurate way to evaluate the number of visitors to your Web site is to look into the log files found on your Web site's server using any of the commercially available Web log products. Web logs track all sorts of information about

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visitors from your site, so that you can find out which pages they visit, when they visit, how long they stay and other crucial details that allow you to make your Web site more effective.

Be sure to focus on the number of actual Web site visitors, not the number of page views or hits. One person going to your site can go to one page and generate five pages viewed and 25 hits, because each page might call four images.

Also pay close attention to the keywords that visitors search for when they come to your Web site, as that is an indicator of topics that are on their minds. If you do not have materials that satisfy their search request, consider putting them on the site right away (assuming the search is from friends of the campaign, not from the opposition trying to search for private information or dirt).

#### **How do I keep track of money raised online?**

The easiest way is to open a separate checking account that only contains funds generated online. This is also a good thing to have when you are scrambling to file your quarterly contribution reports, as online contributions sometimes come batched or with fees already deducted, making it harder to match donors to donations. You also should have notations in your database for the source of funds generated by the campaign.

Even funds generated from an offline appeal can be tagged with the date and source of that offline campaign when the transaction is consummated online. For example, a direct mail piece can be worded so that potential donors are directed to go to a special page on the Web site to make their donation. Instead of going to [www.candidate.com/donate.html](http://www.candidate.com/donate.html) during a mailing sent on February 5, 2004, for example, they can be directed to [www.candidate.com/donate020504.html](http://www.candidate.com/donate020504.html).

#### **Is there a dollar amount I should reach before I call my Web site a success?**

There is no simple correlation between the quality of your Web site and the number of dollars raised. In fact, big money can only be generated if you have a strong candidate, a strong message and good technological backup. Howard Dean in 2003 and John McCain in 2000 had all three and raised a lot of money.

Check out the amounts raised in your area for races comparable to yours before setting your offline and online fundraising goals. Try to raise as much as possible, but remember that the goal is to win the election, not just raise a lot of money.

#### **What about visitors?**

The name of each visitor who fills in an online volunteer or newsletter request form should be placed in your campaign's database. This information is a valuable resource, and should be treated as such. Trust is the candidate's coin of the realm, so do not abuse that trust by sharing visitor information with others unless you have explicitly asked them if you may do so.

*Make sure that you do a strategic plan before creating the architecture of your Web site, so that the navigation elements correspond to things visitors will be looking for.*

### Should I strive for a set number of visitors as a goal during my campaign?

Again, the goal is victory, not just statistics. However, you should find that if your website and email outreach are effective, you will generate a lot of traffic to your site and many of the visitors will sign up to keep abreast of what you are doing.

### What about usability factors?

Industry studies have shown that many large corporate Web sites fail to let visitors find what they are looking for, whether that is the price of a product, the availability of a job, or the location of an office building. Make sure that you do a strategic plan before creating the architecture of your Web site, so that the navigation elements correspond to things visitors will be looking for. Also, be sure to do usability testing of your Web site before going live.

### How do I quantify if my Web site saves time for my staff?

You can make sure it does by asking your staff to list the ten telephone requests they receive most, and then figure out which of these can be done on your Web site. Posting directions to your campaign office, a signup form for volunteering, a list of the ten best ways to help the campaign or other information will allow your staff to use their time most efficiently.

### Any other ways to evaluate my Web site?

Going back to a point we made in the Web site chapter at the beginning of this book, make sure that your web site is being used both as a persuasion tool and as a fulfillment tool. In most campaigns, more people will see your web site than the candidate in person. It is online 24/7 and can add a lot of credibility to your campaign if it looks well-organized and professional. You are spending a lot of time, money and energy on your offline campaign. Make sure you do the same online. Good luck!

## CASE STUDY

Always start from your base of strength, and always give before you ask. Appeal to members of your profession, because they will have common interests with you and see the importance of keeping you in office. One candidate who is a medical doctor, for example, made it a point to speak regularly to medical groups about the issues they are concerned about, such as the cost of malpractice insurance and health insurance coverage for their patients. He would always pick up business cards from attendees, and send out e-mail newsletters periodically discussing his efforts. When he made his end-of-quarter requests for donations, many of them came from attendees at his lectures who had received value first, and were asked for money second.

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Give donors a reason for giving and a reachable goal. During the 2003-2004 Democratic Primary season, Howard Dean's staff was expert at making clear, concrete, attainable goals that tapped into the idealism (and wallets) of his constituents. Whether they were supporting television buys to oppose President Bush in his backyard in Texas or resources to prepare for a primary in Iowa or Wisconsin, the Dean campaign understood how to motivate donors online.

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## CONTRIBUTORS

Julie A. **Barko** is Deputy Director of the Institute for Politics, Democracy & the Internet.

Carol C. **Darr**, Esq. is the director of the Institute for Politics, Democracy and the Internet and a member of the Adjunct Faculty of The Graduate School of Political Management of The George Washington University.

R. Rebecca **Donatelli** is the chairman of Hockaday Donatelli Campaign Solutions. As the lead Internet consultant to the McCain for President campaign, she directed the successful fundraising campaign that brought the Internet into the forefront of political consulting.

Brett **Feinstein** is a partner with Pound Feinstein.

Max **Fose** is a partner with the firm Integrated Web Strategy (IWS). Prior to becoming partner with IWS, Fose was the Internet Manager and Treasurer for the McCain 2000 presidential campaign.

William **Greene**, Ph.D is the president of Strategic Internet Campaign Management, Inc. (SICM.com - pronounced “sick ‘em”), a consulting firm that enables organizations and candidates to harness the power of the Internet for fundraising and grassroots activism. Greene is also Director of RightMarch.com.

Emilienne M. **Ireland** is the president of Campaign Advantage, which provides strategic Web sites, fundraising, and online communications services for candidates, causes, organizations, and corporations. She was named a “Rising Star of American Politics” by Campaigns and Elections magazine in April 2002, and her firm pioneered the only technology for accepting donations via secure online checks that has received explicit approval from the Federal Elections Commission (FEC).

Karen **Jagoda** is Founder and President of E-Voter Institute, a trade association representing Web publishers and political and advocacy solution providers. Ms. Jagoda is also the founder of Turtleback Interactive, a company specializing in strategic research and consulting on e-business development and use of the Internet for cost-effective marketing and communications.

Daniel **Manatt** is the principal of Manatt.net/Web Video for Politics. He edits PoliticalWebVideo.com, a blog that includes clips of significant political Digital Media as well as his publications.

Phil Tajitsu **Nash**, Esq. co-founded and serves as CEO of Campaign Advantage Internet Services. He has spent over two decades fighting for social and economic justice as a writer, organizer, lawyer, teacher, fundraiser, and campaign consultant.

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Lawrence J. **Purpuro** is the founder, Rightclick Strategies (RCS), a web consulting firm. According to US News & World Report, Purpuro is “the guy who developed the Republican RNC’s 2000 Internet initiative that helped elect President Bush.”

Ari **Rabin-Havt** is the creator of the progressive activist Web site Click Back America, a project of Moveon.org.

Kevin **Wells** is a graduate research assistant at the Institute for Politics, Democracy & the Internet.

Marie **Woolf** is creative director and principal of Woolf Media, a California firm specializing in Internet and traditional media concept, design and marketing for both commercial clients and political campaigns from the local to presidential level. She is also founding CEO and a director of 20Maine Software, Inc. and managing partner of January Partners, LLC, a private California investment firm.

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POLITICAL MANAGEMENT**

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The Institute for Politics, Democracy & the Internet  
The Graduate School of Political Management  
The George Washington University  
805 21st St., NW  
Suite 401  
Washington, DC 20052  
1.800.367.4776 toll free  
[ipdi@ipdi.org](mailto:ipdi@ipdi.org)