ONLINE TACTICS & SUCCESS

AN EXAMINATION OF THE OBAMA FOR AMERICA
NEW MEDIA CAMPAIGN

ABOUT THIS REPORT

The following report was prepared by Sarah DiJulio, Executive Vice President, and Andrea Wood, Senior Consultant, of M+R Strategic Services (M+R) for the Wilburforce and Brainerd Foundations. The report documents the results of M+R's quantitative and qualitative analysis of the Obama for America's New Media Campaign. The goal was to attempt to understand which strategies and tactics drove a true return on investment for the campaign and which did not, and how the winning strategies can be replicated by nonprofit advocacy organizations.

Wilburforce Foundation – www.wilburforce.org

The Brainerd Foundation – www.brainerd.org

M+R Strategic Services – www.mrss.com

TABLE OF CONTENTS

INTRODUCTION

••••

"Propelled by Internet, Barack Obama Wins Presidency."[1]

– Wired, November 4, 2008

••••

••••

"How Obama's Internet Campaign Changed Politics."[2]

– The New York Times, Bits blog, November 7, 2008

••••

••••

"How the Internet helped propel Barack Obama to the White House."[3]

– The Daily Telegraph (UK), November 5, 2008

••••

The headlines seem to tell the story. The groundbreaking new media program run by the Obama for America (OFA) campaign was truly impressive, resulting in an email list of 13 million individuals, five million friends on various social networks and half a *billion* dollars raised.[4]

While the Internet was almost certainly a major factor in Obama's victory, the hype can sometimes obscure the real story. Many of the new approaches tried by the campaign created buzz and visibility but offered no measurable results in terms of return on investment for OFA. The five million friends on various social networks, for example, were useful for branding and visibility, but they offered little real-world results in terms of funds raised or volunteers recruited.

Similarly, the My.BarackObama.com toolset allowed supporters to self-organize into affinity groups, raise money from friends and make phone calls from home.

[1] Stirland, Sarah Lai. "Propelled by the Internet, Barack Obama Wins Presidency." Wired Nov. 4, 2008.

[2] Miller, Claire Cain. "How Obama's Internet Campaign Changed Politics." [Weblog entry.] Bits. The New York Times 7 Nov. 2008. <http://bits.blogs.nytimes.com/2008/11/07/how-obamas-internet-campaign-changed-politics/>

[3] Rayner, Gordon. "How the internet helped propel Barack Obama to the White House." The Daily Telegraph 5 Nov. 2008.

[4] Vargas, Jose Antonio. "Obama Raised Half a Billion Online." [Weblog entry.] The Clickocracy. The Washington Post 20 Nov. 2008. <http://voices.washingtonpost.com/44/2008/11/20/obama_raised_half_a_billion_on.html>

However, it generated only a tiny fraction of the total funds raised, volunteers recruited and GOTV calls made on behalf of the campaign.

It is important to note that many campaign insiders cite Obama's field program as the workhorse that won the election. David Plouffe, Campaign Manager, restated the value of the grassroots field program: "There's nothing more valuable than a human being talking to a human being. Nothing."[5]

The field team placed 4,000 paid local organizers on the ground, and while the new media program was tremendously valuable to the field program in identifying and recruiting volunteers, there was *no true integration* between the programs after a new volunteer was recruited and then handed off to the field team.

With these caveats in mind, there are many lessons that nonprofits can learn from the OFA new media program – both what to do, and, in some cases, what not to do.

The following report describes the findings from our assessment and outlines "takeaways" that we believe nonprofits can apply to their own programs and campaigns.

The goal of this report is to:

- Understand what worked – and what didn't – in Obama's new media program.
- Understand what preconditions existed that allowed this campaign to be successful, and which of those can be replicated.
- Identify best practices from the campaign that may be applicable to a wide range of nonprofits.

As you read this report, please keep in mind that the desired outcomes of a political campaign are different than those of a nonprofit. Fundamentally, the Obama campaign wanted to raise money, change voter opinion and turn out voters to the polls. Nonprofits have a range of objectives, from influencing public policy to recruiting volunteers. Although the lessons from the campaign can be applied in a nonprofit context, changes in strategy will be necessary to reflect your particular goals.

---

[5] Lloyd, Jeromy. "Inspired in Cannes." Marketing Magazine 25 June 2009.

KEY FINDINGS

The worst news for nonprofits? One significant factor contributing to the success of the OFA campaign was something that cannot be replicated: Barack Obama, and this incredible moment in history. This unique candidate and the opportunity to elect him to the U.S. presidency created an electorate and volunteer base that was incredibly motivated. The energy and enthusiasm of Obama supporters was unprecedented in modern elections, and is unlikely to be replicated by any individual nonprofit or issue movement. According to Andrew Bleeker, Director of Internet Advertising, "the bigger Barack Obama's head was, the better our ads did."

The best news for nonprofits? The most successful new media strategies for the campaign were all things that can – and should – be replicated by nonprofit organizations. Build an email list. Send high-quality, engaging emails to those constituents. Make them a part of the story. Run a program that is data-driven, and use analytics to improve that program. Use authentic organizational content – video, text and images – to tell a compelling story. Use email and phone calls to ask online volunteers to participate in offline programs.

Fundamentally, the most successful elements of OFA's new media program were not new. OFA's new media team simply executed the same core strategies that many nonprofits have used for years – **but they did so *flawlessly*.**

• • •

"The real drivers were old school. They were email. And they were web." [6]

– David Plouffe, Campaign Manager

• • •

So what made the new media effort so successful? M+R identified seven central factors that wove through every element of the new media program, and frequently through other elements of the campaign as well:

---

[6] "David Plouffe/DDB Seminar." June 2009. Online video clip. Cannes Lions International Advertising Festival <http://www.c,nneslions.com/lions/lightbox.cfm?media_id=770z

1. Discipline

The discipline to develop best practices and stick to them is what often separates a mediocre online program from a truly great one. This includes the discipline required to ONLY send content that you know your supporters will value, instead of sending out the press release from your communications department. It also includes the discipline to adhere to a consistent brand, including look and feel, and message narrative. It means, in short, the discipline to *stay ON message*. OFA executed every aspect of its new media program – and the entire campaign – with impeccable discipline.

David Plouffe, Campaign Manager, described this philosophy as "a belief in alignment. What does that mean?… It meant that you had to be firing off all cylinders… On a day when Barack Obama was in, let's say, Toledo, Ohio … if his speech that day was about energy… we'd make sure our volunteers that day were talking to the voters in Toledo about energy and that we had advertising on that focused on energy and that our Internet advertising in that market was focused on energy. Because if Barack Obama's talking about energy, but … our volunteer knocked on someone's door and talked about health care and the TV ad is about tax cuts and the website's about Iraq, people are going to wonder 'What's going on here?'… That alignment is really hard, though. We had to step back every day and make sure: Are we in alignment?"[7]

2. The Right People

David Plouffe, Campaign Manager, made new media a priority from the beginning. This commitment began with Plouffe's early staffing and campaign infrastructure decisions. Rather than housing the new media team within the communications or finance divisions, Plouffe created new media as a standalone department within the campaign. This meant that Joe Rospars, the head of the new media team, reported directly to David Plouffe, elevating new media to the same level as communications, field or finance.

The Obama campaign eventually built an 81-person new media team, and with volunteers included, the team numbered nearly 170 people by the end of the campaign. Not only was this a big staff, but many of the most talented people in their individual professions were on the new media team. For example, the video lead left CNN to work on the campaign. The graphic designers had worked on Madison Avenue. They worked elbow-to-elbow with former Google employees. And the new media staff roster included one of the founders of Facebook.

---

[7] "David Plouffe/DDB Seminar." June 2009. Online video clip. Cannes Lions International Advertising Festival <http://www.canneslions.com/lions/lightbox.cfm?media_id=770>

3. Spotlight on Supporters

The campaign made a concerted and deliberate effort to keep the spotlight on the people who supported Obama, and not just on the candidate. One of the single most successful fundraisers for the campaign was an email sent after Sarah Palin's speech in which she derided "community organizers." This statement struck a nerve. The campaign immediately sent an email to capitalize on the perceived insult, which many of Obama's supporters took very personally. The email, sent hours after the speech aired, raised $11 million dollars in a single day.[8] (See page 22 for a copy of the actual email.)

Not only were supporters a core part of the campaign story at every level – including in the national media – but the campaign also created tools and forums that encouraged two-way communications and invited people 'in' to the campaign. However, these tools were not necessarily as critical as the story *about* the tools, which was really a story of how supporters became the center of the campaign. In July 2008 a *New York Times* reporter wrote, "The campaign's new media strategy, inspired by popular social networks like MySpace and Facebook, has revolutionized the use of the Web as a political tool."[9]

4. Nimbleness

Being able to react quickly to breaking events was critical to the new media program's success. Again, this can be seen in the campaign's response to Palin's "community organizer" comment. The campaign was able to turn on a dime and launch a fundraising email within hours of Palin's speech. In addition, the campaign used video as a rapid response tool. Instead of taking days or months to produce videos, the campaign would at times have a new video out within a few hours (or less) of an important speech or media moment. This frequently meant that instead of reacting to the news cycle, the new media team was actually scooping traditional media by getting their content up on the web faster than traditional media outlets could report on the story.

5. Authenticity

In the nonprofit sphere, email copy seems to see-saw between wonky and dumbed-down. But OFA managed to do something unique – share real, inside campaign information with its supporters, while making that information accessible and meaningful. For example, the campaign published a seven-minute video of David Plouffe on YouTube, detailing the campaign's electoral vote strategy – filled with wonky, insider information.[10]

---

[8] MarketingProfs LLC. The Obama Playbook: How Digital Marketing & Social Media Won the Election. 2009.
[9] Stelter, Brian. "The Facebooker who friended Obama." The New York Times 7 July 2008.
[10] David Plouffe on Our Strategy [Video]. June 27, 2008. <http://www.youtube.com/watch?v=a6bp0B61rNk>

David Plouffe later described the strategy: "'We talked to people like they were adults,' he said. 'Nothing is more important than authenticity. People have very sensitive bullshit-o-meters.'"[11]

6. Content Matters

From top-notch emails, to 1,800 videos, to amazing graphic design, the new media team demonstrated a serious and intensive focus on content. The campaign deliberately built profiles of specific online personas (David Plouffe, Jon Carson, Barack Obama, etc.), giving them each a unique voice.

Scott Goodstein, the campaign's External Online Director, described how good content trumped all of the individual new media tactics: "Tools are a frying pan. If the ingredients (the content) aren't tasty, you're still going to have a horrible dinner."

7. Data-Driven Culture

More so than any campaign in history, OFA was a data-driven operation. This was profoundly true for the new media program. By the general election, they had a six-person analytics team and they had tested and measured every aspect of the online program, including messengers, messages, layout, design, video, voice, segmentation, and other tactics. Entire projects were scrapped because the data showed they weren't effective; resources were then directed to higher-performing strategies.

According to Stephen Geer, Director of Email and Online Fundraising, "Hilary's strength and endurance as a candidate lengthened the primary process and engaged voters in all 50 states in an unprecedented way. From January to June of 2007, our team had to compete in a real contest with real results nearly every week – and sometimes several contests on the same day. That process was the ultimate petri-dish for online tactics, it allowed us to test and re-test every aspect of our program."

One other point, which is small, but important: A number of articles have noted the importance of youth in helping to elect Obama. While it may be true that young people represent a critical voting block, the volunteers and donors that formed the engine of the campaign were, according to a number of staffers, middle-aged or older. Even on the campaign's own social network, My.BarackObama.com, the primary user was not youth.

---

[11] Sweney, Mark. "Barack Obama won using 'old school' technology, says his campaign manager." The Guardian 25 June 2009 <http://www.guardian.co.uk/media/2009/jun/25/barack-obama-david-plouffe>

IN-DEPTH ASSESSMENT FINDINGS

A. Building a New Media Team

The Obama for America campaign invested millions in its new media program. The new media team itself was huge, with 81 paid staff at the height of the general election season (170 including volunteers).

The campaign also invested in professionals – filmmakers, online writers, data analysts, and so on. The team was stacked with talented people at the very top of their game, many of whom left high-profile careers at places like CNN and Google to come to Chicago and work with OFA.

Dan Siroker's story is a good example. After hearing Obama speak at Google, Dan took a hiatus from his job as Product Manager at Google and moved to Chicago, where he slept on a friend's floor while serving as Analytics Lead for the campaign. It was clear from M+R's interviews that the opportunity to work on the campaign was a powerful draw — Obama was a once-in-a-lifetime candidate who espoused the power and promise of the Web.

The campaign's recognition of the value of online organizing led to a critical administrative decision: making the new media team as much of a priority as other campaign divisions, including field, communications, policy, finance, and operations. That meant that the director of new media was a peer to the director of communications, the field director, and so on. New media staff members were not housed in the IT or the communications division. This was an intentional decision from the outset that proved to be important.

Michael Slaby, who was the Deputy Director of New Media and the Chief Technology Officer for the campaign, emphasized the importance of having the new media director be a peer to the other program directors and not a subordinate to one of them. Multiple campaign staff mentioned that the new media team maintained tight control over all elements of the online program.

The organizational chart for the campaign looked like this:
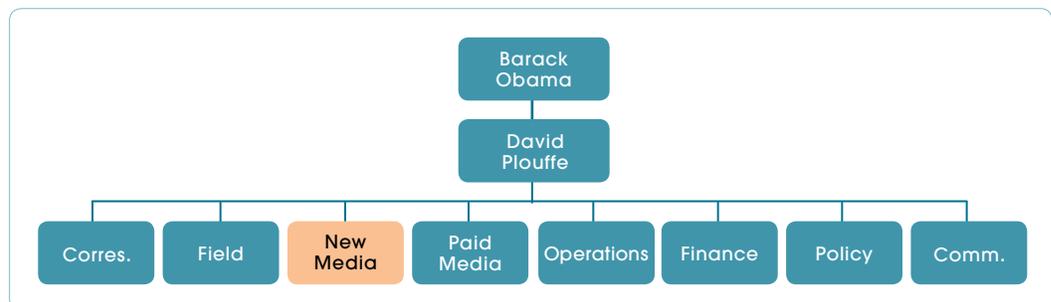
This level of independence was critical to OFA for two important reasons:

- **Status within the Campaign.** Equal status meant respect. "New media is sometimes treated like the IT department, instead of a tool for making a very special connection with people," said Kate Albright-Hanna, Director of Video. There was no question across all divisions that new media had an important and unique role to play in the campaign.

  This structure allowed the new media professionals to make critical decisions that a traditional communications or finance director may not have been as likely to advocate for. In our interviews, both the highly successful Dinner with Barack email series and the decision to announce the VP pick via mobile text were cited as examples of things that would have been less likely to happen without this structure in place.

- **Rapid Response.** Equal status allowed the new media team to work independently and rapidly move an idea up the chain of command for final approval. Emails were reviewed, approved and sent in a matter of hours to capitalize on a highly charged moment before it slipped away.

Nonprofit Takeaways

The reality for most nonprofits is that the planets may never align like they did for OFA during the 2008 presidential campaign. However, by studying how the campaign built, managed and nurtured a talented and productive team of professionals, nonprofits can set themselves up for exceptional results, too.

- **Give new media the independence it deserves.** Often at nonprofits, new media staffers are lumped in with the technology staff or traditional communications staff. Give your online organizers a status that befits their important role. Make sure they have the independence to get their work done quickly, without a glut of heavy-handed oversight.

- **Hire professionals.** Building a high-performing and nimble team of online organizers takes careful effort. Chief Technology Officer Michael Slaby had this piece of advice: "You need more new media people than you think you do, and they are worth more than you think they are."

If new media is going to be an important part of how your organization achieves its mission, invest in top-notch people. In other words, don't expect interns or volunteers to do the bulk of the work.

It's also important to hire people who have a proven track record in what you want them to do. Start out with the right people who have the right skills and who will instill confidence throughout the organization.

- **Hire 'doers' who are smart.** Whether you are building a team of three or 30, here are the essential hires:
    - **A creative team leader who wants to get their hands dirty and isn't interested in being an administrator.** This person should be a creative, strategic thinker who believes in a data-driven approach. Look for a sharp, entrepreneurial thinker who will roll up their sleeves to lead your online organizing team.

    - **A good writer who can write compelling emails.** Well-written emails with a strong narrative arc and clear, straightforward content were the hallmark of OFA's online campaign. Writing a good email is a unique skill that is very different from writing for a publication or even writing for the Web. Find a writer who understands how people actually read email and who knows basic online organizing principles. Without great email copy, you may as well just be emailing press releases to your list. (See page 22 for an example of a great email.)

    - **A person who loves testing and analytics.** Across the board, former staff from OFA's new media team cited testing as a critical element of their success. Hiring a staffer with expertise in setting up quality tests, interpreting results and presenting the results in plain English can pay off.

    - **A techie who can program on the fly, and who learns quickly.** We're not talking about an on-call IT-type. The techie on a new media team needs to understand content management systems, data integration, database management, and needs to have programming skills (Flash, HTML, CSS, etc.) to make all the technical components of an online program work. This is not the person who helps coworkers fix an Outlook problem. This is a key team member who can make the machinery behind a new media program run seamlessly.

B. List Building

One critical objective of the new media team was to grow the list – to collect as many emails as possible, as quickly as possible, given the finite life of a presidential campaign. For example, the campaign rarely used the BarackObama.com landing page to raise money. Instead, it was optimized for collecting emails.

Campaign staffers said this "get the email address first" approach was adopted from the start for one simple reason: 10% of people who visited the website might sign up to receive ongoing email, but only 1% would sign up to donate.[12] Pushing donations would leave 9% of potential supporters blowing in the wind. Donations lost in the short-term were dwarfed by the accumulated value of an email during the life of the campaign. This also held true with signups generated from paid advertising.

The campaign used a simple measure of success: the value of an email over the lifetime of the campaign. The campaign tested ads that asked for a donation versus ads that asked people to join the list first, followed by a donation appeal. Testing showed that more money was raised when people were asked to join the list before they were asked to make a gift to the campaign. Building the relationship with supporters over time produced better results.

OFA's email list grew to an estimated 13 million people, including three million online donors.

Here's how the campaign built its list:

Website Optimization and Testing

The new media team invested a lot of resources into testing the splash page at BarackObama.com. Given the large amount of traffic driven to this page by news media and paid advertising, even tiny changes could result in a higher conversion rate and translate into more dollars donated over the life of the campaign. In one test, the team wanted to know which phrase worked better on the "big red button": 1) Sign Up; 2) Learn More; 3) Join Us Now; or 4) Sign Up Now. ("Learn More" was the winner).[13] The team also tested whether images or an auto-play video on the splash page increased conversion. They tested three different images and three different videos for the splash page.

---

[12] This does not represent actual campaign data, but rather a hypothetical scenario described by a campaign staffer; something along the lines of these results led to the campaign's decision to lead with a sign up page.

[13] Siroker, Dan. "How We Used Data to Win the Presidential Election." 8 May 2009. Online video clip. Stanford University <http://cobb.stanford.edu/courses/cs547/090508/090508-cs547-300.wmv>

In many cases, the results were a surprise to the team, which was a key lesson learned. The choice to rely on the data instead of assumptions or hunches about what worked made decision-making simpler and success a lot more predictable. Every staffer we spoke with couldn't emphasize the importance of the testing enough—in the end, this data-driven approach meant more signups, more conversion to donors and ultimately helped Obama win the presidency.

The images below show the splash page at four different points in the campaign. Although we were not able to obtain detailed test data, several campaign staff pointed out that if we simply examined the web pages, emails and promotions that were running in the final two months of the campaign, we would see the winning versions at work.

In the first example, from July 1, 2007, you can see the very basic email signup box. The second example comes from late 2007, after the campaign had developed its iconic logo. The two data points are the same, but now the phrase on the page is "Join the Movement" and the button reads "Join Us." Clearly, the campaign was learning that "Sign up" was not the most effective language.

JULY 2007   **DECEMBER 2007**

By May of 2008, the campaign was running a splash page with a 'dual' ask – both a donate button and an email signup form. But by the fall of 2008, the campaign was focusing solely on the signup promotion. As you can see, the final screenshot continues to feature "Join the Movement" language, but now uses a "Learn More" button (in a contrasting color).

| MAY 2008 | FALL 2008 |

Paid Online Advertising

Advertising was used to reach three goals during the course of the campaign: 1) list building and fundraising; 2) persuasion or visibility; and 3) field/Get Out the Vote (GOTV). Andrew Bleeker, Director of Internet Advertising, cautions those who wish to emulate the campaign: "Have a goal. Know what you want your ads to do. Is it list building, awareness, persuasion, direct response? Being wish-washy will get you bad results." And if the purpose of the ads is simply branding, Bleeker adds, "Be OK with that," and don't expect to generate responses from those ads.

The campaign spent over $16 million on online advertising in 2008, more than four times what John McCain's campaign spent ($3.6 million).

The campaign spent $10 million of those ad dollars on Google alone. Display and text ads in Google's AdSense network took up a large chunk of the ad budget, but the campaign also did some search result advertising. Advertisements like those in Google's AdSense program had a return on investment (ROI) of three times the cost of the ad, according to one staffer. In other words, new signups more than paid for the ads that hooked them in.

However, according to Bleeker, "Half the sites we tried didn't work. We figured this out and stopped using them." As with so many other elements of the new media program, the campaign tested, tracked and then modified its strategy based on results.

Bleeker also noted that interactive advertising really worked. "The tax calculator ad was a great persuasion ad because it really engaged people. Millions of people used it," he said.

Youth Marketing

During the final months of the general election, the campaign tested strategies designed to reach and turn out certain target voters, including youth voters. They tested TV, radio, digital, print, Internet, outdoor, mobile, and street team ads.

Among the tests, the campaign experimented with other types of digital advertising, such as in-game ads on Xbox LIVE. Xbox ads promoting VoteforChange.com ran in 18 different games and targeted young men ages 18-34 who lived in battleground states.

However, test results led the campaign to concentrate resources on Internet, radio, street teams, and some limited outdoor advertising. What does this tell us? The other strategies (TV, digital, print, mobile) appear not to have been cost-effective at reaching youth voters.

Be the First to Know: V.P. Announcement

By all accounts, one of the most successful recruitment tools of the campaign was when supporters were offered the opportunity to "be the first to know" who Obama's running mate was going to be.

To sign up for the announcement, people could opt-in by sending a text message from their mobile phone to "62262" (which spells "Obama") or they could submit their email address or mobile text number on the website.

The anticipation of the moment made it a perfect opportunity to offer a simple, free "premium" just

TAX CALCULATOR

...

V.P. ANNOUNCEMENT

for signing up. The novelty of this approach spurred tons of buzz from bloggers and mainstream news outlets.

Though M+R could not determine exact results, various campaign staff said that this was a key recruitment tool for new emails and mobile phone numbers. (The ability to send text messages later proved invaluable to the campaign, particularly on November 4th, when the campaign could send a text message that said "Stay in line! The polling hours are being extended to be sure everyone gets to vote!" in order to encourage people to stick it out).

VoteforChange.com

Vote for Change was one of the most underrated elements of the Obama campaign's new media program. Despite all of the hype around Web 2.0, this simple yet powerful tool was hugely effective, and was a brilliant strategy.

Fundamentally, the Vote for Change site was built around the premise that if the Obama campaign offered a product that people wanted – a convenient voter registration and information tool – they could use it to enhance Barack Obama's brand and grow the email list.
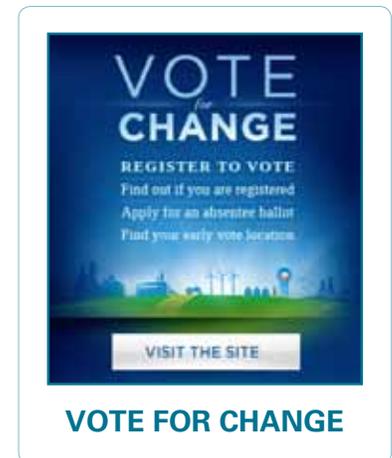
VOTE FOR CHANGE

It is important to flag how different this is from the other online marketing that the campaign conducted, which highlighted Barack Obama and recruited people to join the campaign and vote for him.

VoteforChange.com was much more subtle – it marketed the voter tools first – and only once someone had engaged with the tools did it pitch Barack Obama. As you can see in the promotion above, the Obama campaign logo was barely visible in the advertisements.

By all accounts, Vote for Change was a tremendous success. One staffer reported that 700,000 people downloaded voter registration forms through VoteforChange. com. In a number of primary states, the number of voter registration forms downloaded exceeded the margin of victory. The convenient tool provided a service that people were actually looking for.

List Appends

A list append is a simple process: an individual's name and mailing address are matched against commercially available data to obtain their email address. Individuals 'appended' in this way are then sent an email message by the sponsoring organization offering them the opportunity to opt-out from future communications. The Obama campaign used the email append process to obtain email addresses for supporters for whom they only had mailing addresses.

According to Andrew Bleeker, Director of Internet Advertising, it is "key to append people who have done something positive for your organization – made a gift offline, volunteered. These people will perform… Don't do this with people who have never done anything for you, even if they are good targets for other reasons."

Many nonprofits have successfully used an email append to acquire email addresses for their direct mail donors, and OFA's experience seems to reinforce that this is an effective tactic.

House Parties and Event Signups

Although the exact numbers aren't known, new media staffers reported that signup efforts at major events and house parties yielded a significant number of email addresses for the campaign. For example, at one event where the campaign expected 29,000 participants, the campaign recruited an army of 2,000 volunteers to collect information from those supporters, including email and cell phone numbers, and then immediately enter the data.

Marie Ewald, National Programs and Fundraising Manager for Email, also noted that online surveying of new subscribers showed that the "entry point for a lot of people turned out to be through house parties. House parties…can be great for recruiting people. It's a really meaningful experience for them."

Nonprofit Takeaways

- **Use your website to convert new subscribers.** Nonprofits can make sure their website conversion rates are as high as possible through simple multivariate testing. This should include some simple testing of page design elements, like button color, as well as landing page text and images. Variations on these elements can make a real difference in conversions, and can help ensure that a nonprofit organization is grabbing every email they can from passive Web visitors.

Remember, Obama's own staff couldn't predict which design elements would ultimately work best. They relied on solid testing and quality data to point the way instead of "going with their gut." Optimizing your website for email capture becomes particularly critical when your organization gets a publicity boost from a news story or is mentioned in a prominent blog. Inevitably, site traffic will increase and you want to be ready to recruit as many of those visitors as possible for your list. Otherwise, you're leaving potential supporters (and donations) on the table.

- **Advertising.** Paid advertising can pay off, even if you don't have OFA's $16 million online advertising budget. Whether your budget is $5,000 or $50,000, it's important to put together a plan and establish a clear goal. What do you want your ads to do? Recruit new supporters? Raise awareness about your organization or issue? Raise money? Persuade people to think or behave differently? Ask people to take action? Here are some other good tips shared by the new media staff M+R interviewed:

  o **Start with the low-hanging fruit**, such as search engine advertising, Cost Per Click (CPC) advertising and Cost Per Acquisition (CPA) advertising. These will yield the highest quality recruits for the lowest investment.

  o Unless your budget is large, **don't invest in CPM** (Cost Per Thousand Impressions) **banner ads** or blog ads.

  o **If you can, use a media buyer or consultant** – a professional can help you get the very best rates and monitor what you're getting in return for your investment.

  o **Shoot for 20-25% page conversion rate**, and pay a fair price. Andrew Bleeker, Director of Internet Advertising, shared some rough estimates for fair Cost Per Acquisition in various markets:

    - National ads: $3-$4 CPA
    - State ads: $6-$10 CPA
    - Search engine ads: $2-$3 CPA
    - Local news sites $15-$30 CPA
    - Email appends: $.07 per email address

  o **Test and track everything!** Before spending a lot on an ad program, especially for persuasion or GOTV ads, make sure you know exactly how you are going to evaluate results, and ideally have a control group in place for persuasion ads, to see if the ads really produce results.

- o **Promote a unique tool or service** that engages people, such as OFA's tax cut calculator. Does your organization put together a voter guide or a tool to help people calculate their carbon footprint? Advertise it!

- o **Have a clear call to action.** Don't be vague. Ads should be engaging and clearly state what you want people to do.

- o Make sure the **last slide in an animated banner is self-explanatory** and works on its own, without the other slides.

- o **When designing your ads, don't use white,** but do use high contrast colors that don't blend into the site you're advertising on. Make sure your ad stands out. If you are running ads on a blue website, make your ads yellow and red.

C. Fundraising

Total amount raised by McCain and Obama: 2008 Presidential race[14]

Note: Does not include federal funds

- $ 156,000,000 **(Obama Offline)**
- $ 201,000,000 **(McCain Total)**
- $ 500,000,000 **(Obama Online)**
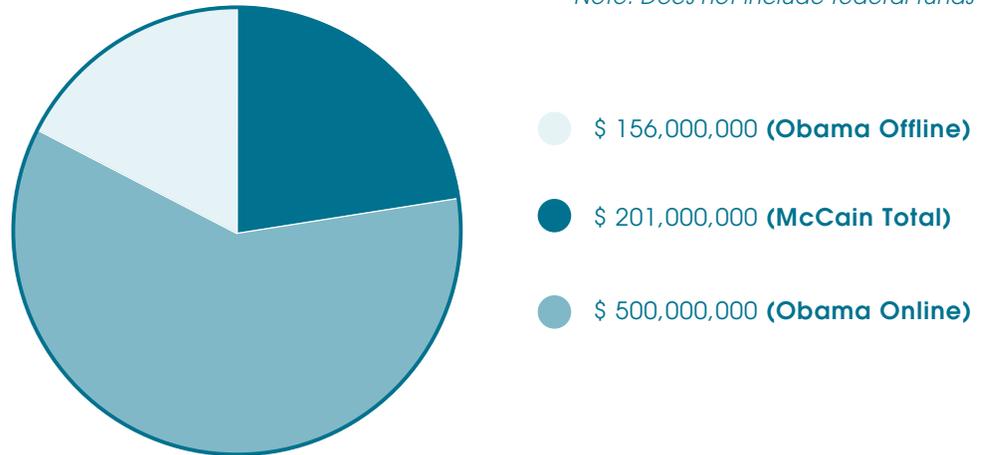
The Obama campaign took a page from Howard Dean's 2004 campaign playbook by soliciting smaller donations from a broader audience and by pushing federal filing deadlines. All in all, OFA raised $656 million, while McCain's campaign raised $201 million (not including federal funds). Five hundred million of OFA's total was raised online; that's *half of a billion dollars* from the Internet, primarily through emails.
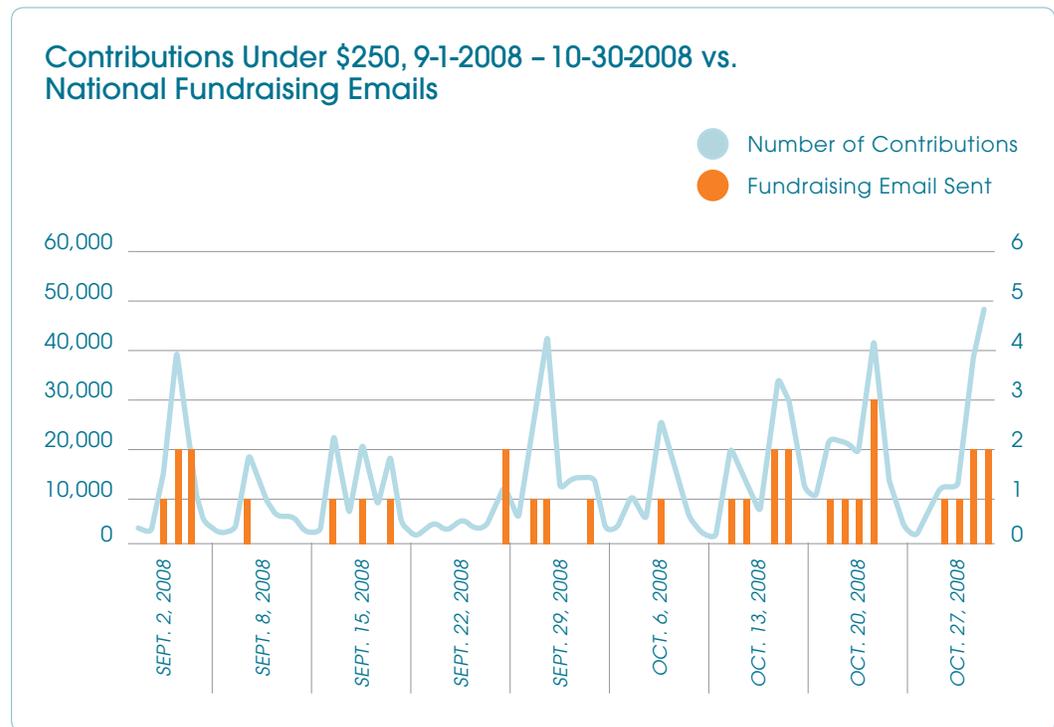
That money supported vital campaign operations such as salaries for thousands of field staff, nearly $250 million in TV air time[15] and grassroots GOTV momentum leading up to the election. In other words, the funds raised via the Internet fueled the working parts of a winning campaign machine.

Throughout our interviews, it became clear that the online fundraising effort was fueled largely by the campaign's email list of 13 million people. According to Stephen Geer, Director of Email and Online Fundraising, "eighty-five percent or more" of the funds raised online came through direct emails, and the rest of the online fundraising was primarily through online ads.

---

[14] Siroker, Dan. "How We Used Data to Win the Presidential Election." 8 May 2009. Online video clip. Stanford University <http://cobb.stanford.edu/courses/cs547/090508/090508-cs547-300.wmv>

[15] Gordon, Greg. "Obama raises big bucks, spent $250M on TV." The Seattle Times 6 Nov. 2008.

When we conducted our own analysis of the FEC data, isolating gifts under $250 and looking at the number of gifts by day, we saw a strong correlation with the fundraising emails sent out that day or the preceding day.

Contributions Under $250, 9-1-2008 – 10-30-2008 vs. National Fundraising Emails

Number of Contributions
Fundraising Email Sent

Although this data set is not *restricted* to online gifts only (that data was not available), we did restrict our analysis to gifts under $250, in an effort to exclude high dollar event fundraisers. Because of the nature of the data, we cannot correlate these returns to specific individual email messages, but it is clear that every email on this chart corresponds with a spike of some type.

What made Obama's emails special? For one thing, the email content was exceptional. Language was consistently grounded in the campaign narrative, with the focus squarely on what supporters cared about at any given moment.

The importance of high-quality email content can't be overstated. Content was essential because it drew people in, made them feel like they were part of something big and eventually inspired millions to volunteer or open their wallets.

Relationship-Building

In all of M+R's interviews with former staffers, one thing stood out as critical to the success of the email fundraising effort, and that was nurturing a one-on-one relationship with online supporters. Instead of putting the candidate in the spotlight, the aim was to shine a light on the people who made the movement. Marie Ewald, National Programs and Fundraising Manager for Email, said this approach included "developing a real relationship with your online supporters, making sure it is a two-way street, soliciting their stories, comments and questions."

In this way, the new media team built a rock-solid community of devotees – many of whom donated multiple times during the life of the campaign.

Authenticity

Over and over again in our interviews, campaign staff emphasized the value of being authentic and unafraid of pulling back the curtain. The email on the following page (which also features a video), is a great example of how the campaign created an authentic experience for its constituents.

What makes the email below so authentic?

1. The tone is personal and informal ("Toby – " instead of "Dear Toby," and it is signed simply "David");

2. It provides great "insider" details about crowd counts and what the campaign is up to;

3. The video of Plouffe is raw and "un-produced" so it feels like he made it and then sent it to his friends instead of a list of millions; and

4. David Plouffe signs the email at the bottom with just his first name, before his full name and title appears.

This email also showcases the relationship-building focus of the campaign, through the numerous elegant ways in which David gives the supporters credit for the campaign's success and makes them an integral part of the story.

Toby --

A record 100,000 people rallied with Barack in St. Louis yesterday, and another 75,000 in Kansas City last night. Back in Chicago, we were tallying up our latest fundraising numbers.

Supporters like you have completely transformed how political campaigns raise money, so I wanted you to be the first to know how we did in September.

I recorded a short video to share the latest numbers:

When Barack entered this race, he put his faith in the power of ordinary supporters like you coming together and building a movement for change from the bottom up.

That's exactly how we got this far -- and you should feel proud of all we have accomplished together.

But with just 16 days left in this election, we can't slow down now. Please take a minute to watch the video and find out where we stand:

https://donate.barackobama.com/septembernumbers

Thanks for everything you're doing,

David

David Plouffe
Campaign Manager
Obama for America

The Narrative Arc

The campaign placed a big focus on the overall narrative arc of the emails. The story from one email to the next was consistent, and many of the fundraising appeals were part of a multi-message email series.

Video

The campaign frequently embedded video in its fundraising appeals. The screenshot of the video was featured in the email itself, and the video was watchable from the donation landing page.

Timing

Nothing exemplifies the importance of nimbleness better than the "community organizer" email sent by David Plouffe on the night of the Republican National Convention. (Read the entire email, below.) As soon as the words left Sarah Palin's mouth, campaign staff knew they had a huge opportunity and they immediately began crafting a message that would give their supporters a way to vent their outrage. The email contained a modest request for a $5 donation to help "remind [the McCain campaign] that everyday people have the power." This single email, sent just hours after Palin's speech, raised close to *$11 million* for Obama's campaign.

•••

"Timing is more important than perfection."

- Arun Chaudhary, New Media Road Director

•••

Andrea --

I wasn't planning on sending you something tonight. But if you saw what I saw from the Republican convention, you know that it demands a response.

I saw John McCain's attack squad of negative, cynical politicians. They lied about Barack Obama and Joe Biden, and they attacked you for being a part of this campaign.

But worst of all -- and this deserves to be noted -- they insulted the very idea that ordinary people have a role to play in our political process.

You know that despite what John McCain and his attack squad say, everyday people have the power to build something extraordinary when we come together. **Make a donation of $5 or more right now to remind them.**

Both Rudy Giuliani and Sarah Palin specifically mocked Barack's experience as a community organizer on the South Side of Chicago more than two decades ago, where he worked with people who had lost jobs and been left behind when the local steel plants closed.

Let's clarify something for them right now.

Community organizing is how ordinary people respond to out-of-touch politicians and their failed policies.

And it's no surprise that, after eight years of George Bush, millions of people have found that by coming together in their local communities they can change the course of history. That promise is what our campaign has been about from the beginning.

Throughout our history, ordinary people have made good on America's promise by organizing for change from the bottom up. Community organizing is the foundation of the civil rights movement, the women's suffrage movement, labor rights, and the 40-hour workweek. And it's happening today in church basements and community centers and living rooms across America.

Meanwhile, we still haven't gotten a single idea during the entire Republican convention about the economy and how to lift a middle class so harmed by the Bush-McCain policies.

It's now clear that John McCain's campaign has decided that desperate lies and personal attacks -- on Barack Obama and on you -- are the only way they can earn a third term for the Bush policies that McCain has supported more than 90 percent of the time.

But you can send a crystal clear message.

Enough is enough. Make your voice heard loud and clear by making a $5 donation right now:

https://donate.barackobama.com/fightback

Thank you for joining more than 2 million ordinary Americans who refuse to be silenced.

David

David Plouffe
Campaign Manager
Obama for America

DONATE

Frequency

The campaign's strategy included a large volume of messaging. One M+R staff member collected more than 350 emails sent to her from the campaign. The campaign set a limit: no more than three emails in one day sent to any individual's address. To send no more than three emails in one day was a somewhat arbitrary decision – unlike almost every other aspect of the new media program, the campaign did not test email frequency.

Because of the unique nature of this historic campaign, we cannot make assumptions about how increasing the volume of email messages would affect a nonprofit. In observing our own nonprofit clients, M+R has noticed than an increase in emails can be particularly effective if there is a critical issue at stake, when supporters will often tolerate higher volumes of messaging.

While the new media team kept messaging volume high throughout the campaign, the ratio of the emails varied during the course of the campaign. For example, GOTV messages became the highest priority as November 4th grew closer; more GOTV messages were sent and fundraising emails became less frequent.

Special Offers

The campaign extensively tested premiums (a small merchandise item) in association with a donation. These premiums ranged from mugs to t-shirts to car magnets, and they proved to be very lucrative, according to new media staff.

Another tactic used by the campaign was to offer people a free bumper sticker just for signing up. Once they signed up, the confirmation page asked for a donation. This proved successful, since one in 10 people donated an average of $40. The bumper stickers cost $1, so for every $1 spent the campaign made $4. According to campaign staff, the most effective premiums were car magnets and t-shirts.

Another carrot used by the campaign was the chance to win exclusive experiences, such as Dinner with Barack, joining Barack on election night or going backstage with the Obamas at the DNC Convention. These messages were yet another chance to invite people to participate in the movement—to celebrate the win they helped create. The language was never about "star power." Instead it was about a chance to be a part of history in the making. The language from an email titled "Front Row to History" reads, "When you look back on Election Day years from now, you'll tell your friends and family that this was the moment you helped make history."

The campaign also ran a matching gift campaign that partnered existing donors with new donors. An email signed by Barack Obama on October 13, 2008, explained the offer: "A previous donor has promised to match your donation to encourage you to give for the first time."

This strategy created urgency (there was a deadline) and offered a new benefit to making an online gift right then. The strategy was especially brilliant in that it could be used with two different audiences – both existing donors and new donors got the same fundamental appeal.

Testing

Again and again, campaign staffers talked about how their hunches were proven wrong once put to the test. The new media team tested numerous versions of an email (upwards of 15 different versions in some cases). According to Stephen Geer, Director of Email and Online Fundraising, a few of the things that they tested included: "The design and presentation of premiums. The layout and language on landing pages. The style and content of graphics."

Although M+R did not have access to the campaign's test data, a few things stand out in many of the fundraising appeals during the final two months (when, presumably, the test results would inform best practices):

- The majority of the fundraising appeals featured no graphical header at all, in just a few cases they had a small campaign logo, but the majority started straight with the salutation.

- The emails began with two to three very short paragraphs consisting of no more than one to two sentences each and an immediate link to donate.

- Many appeals featured a large graphic, with a big red button, immediately after the first link to donate.

Email Signers

One way the campaign took advantage of the sheer volume of emails it sent was by changing the name in the "from" line. The rotation of signers included Joe Biden, Michelle Obama, David Plouffe, and Barack Obama. The writing team worked hard to carefully hone the voice of each signer and build a narrative around their personality.

Occasionally, state-level campaign staff members served as signers, such as "From: Ray Rivera, Colorado State Director." In those cases the 'ask' was usually specific to the state. For example, one email sent to Colorado voters asked them to help get out the vote in Colorado.

Asking for More

New media had a simple philosophy that worked: never ask donors for less than the amount they'd donated previously. If someone just donated $75, the next appeal would ask them for $75 *or more*. The same was true for someone who had donated $500—the next appeal they received would ask them for $500 *or more*. Stephen Geer, Director of Email and Online Fundraising, explained, "During the primaries, we tested all kinds of ask amounts to people who had given $1000 or more. What we found is that if we made a good case, an enormous percentage of them would just max out. It was unbelievably effective."

Nonprofit Takeaways

- **Build a relationship.** Make your supporters a part of your organizational story, and have a real dialogue with them.

- **Be authentic.** This doesn't require any additional resources, but pulling back the curtain and letting your online supporters understand more about how you work can be an incredibly powerful way to deepen their investment in your organization.

- **Be ready to seize hot moments.** Nonprofits should streamline their approval process, be on the lookout for media moments and make sure everyone is ready when an "all hands on deck" event happens.

- **Offer mission-driven premiums and prizes as incentive.** While nonprofits will want to be cautious about this strategy – there is a risk that your donor base will become too dependent on these special offers – offering a mission-driven premium or prize as an incentive can boost response rates significantly.

A matching gift campaign can boost responses, with none of the downsides of offering a premium.

- **Test everything.** Even if you can't repeat the Obama campaign's testing program, most nonprofits should be able to do a simple A/B split test with each fundraising campaign. Consider experimenting with email signers as a part of your testing program.

- **Video.** Use video in your fundraising appeals. It doesn't have to be fancy. If you have a compelling personality at your nonprofit, try just having them speak to a standard hand-held video camera. But don't forget to test!

- **Use highest previous contributions to ask for more.** Always track how much your supporters have given in the past, and ask.

D. Campaign Integration

Many nonprofits struggle with online tools and strategies, not only because they are new, but also because of the complex ways in which they impact every other element of a nonprofit organization. For example, an email advocacy alert that asks people to call their Senator might fall under the purview of at least four different departments – advocacy, communications, field, and development. This organizational log-jam often slows things down, and without coordination there is the risk that the online program will go off message or have people take actions that are counter-productive to the cause.

So how did OFA handle this complex interplay?

The new media team was in a unique position: it had to serve the other campaign teams even though it was not subordinate to them.

Putting aside structural issues, it is clear from our interviews that the levels of integration varied dramatically by program. We looked more closely at a few critical campaign teams – communications, finance and field.

Communications

Both online and traditional communications were tightly integrated and often played off one another. Innovative online strategies would generate media coverage; high profile media moments would drive online results. According to Marie Ewald, National Programs and Fundraising Manager for Email, to improve coordination, "we had a new media rapid response person sitting in the comms team."

Finance

Finance was responsible for the offline and event fundraising, but the new media team owned the online fundraising goal. It appears there was very little coordination between the strategies, beyond sending emails inviting targeted audiences to attend fundraising events.

Synchronizing online and direct mail fundraising strategies, as many nonprofits do, was not a goal for the campaign. Marie Ewald, National Programs and Fundraising Manager for Email, was responsible for most of the national fundraising appeals during the general election. Ewald indicated that direct mail and online fundraising were not integrated: "The campaign adhered to a consistent message across all channels, but online fundraising operated at a much faster pace, and we employed

tactics that were possible only with our online tools and audience."

Although this might seem to be a downside, it is possible that it actually helped the online fundraising program. The new media program wasn't hamstrung by traditional fundraising models and the online team was free to fully exploit the creative opportunities presented by the Internet.

Traditional fundraising efforts also have a much slower lifecycle: to write, print and mail a direct mail piece can take weeks, during which time the online campaign might cycle through four or five different narrative arcs.

Field

There was intense coordination up front between new media and field. Initial recruitment of volunteers was a key role for the new media program. Volunteer recruitment was primarily driven by email, often featuring compelling video. Additional volunteers were identified from the My.BarackObama.com tool.

National Field Director Jon Carson appreciated this aspect of the program. "The first thing new media did – it just found people that you don't find otherwise," he said. Jeremy Bird, Ohio General Election Director, reinforced this point, explaining that the new media program's "biggest benefit to field was the list of potential volunteers."

However, once volunteers connected to a local field office, their online and offline experiences ceased to fully integrate. "The offices, neighborhood teams, precinct captains, simply weren't reflected with the online social networking tools. The new media tools were not set up to mirror the offline neighborhood team structure in a meaningful way," explained Bird. "This was a big failure – a failure primarily caused by a lack of time for that integration to happen in a meaningful way."

Although the field program did use a complex Web-enabled database to manage volunteers and voter contacts, it was not integrated with the new media program. The Voter Activation Network (often referred to as 'the VAN'), which powered the field program, was never successfully integrated with the Blue State Digital tools that managed the online organizing program, much to the dismay of many involved in the campaign. According to Carson, the campaign "never tied the new media program to the VAN in any kind of successful way."

There is some consensus that if the online tools to support the field program had been developed earlier, perhaps integration would have ultimately been more successful. But several staff mentioned the fundamental reality of technology development life-cycles: they just don't move that fast!

Nonprofit Takeaways

- **Integration may matter less than you think it does.** Perhaps one obvious lesson is that all tools and strategies don't have to integrate for you to achieve success. OFA ran an incredible field program that wasn't directly integrated with the new media program.

- **Technology development takes time (and money!).** Don't expect to develop a completely new tool on the fly (especially if it is expected to scale up, as most are). A nonprofit organization may be better off looking for established options that have already been designed and tested.

- **Email and video *can* drive volunteers.** Email was successful at turning out huge numbers of volunteers. The use of video in those emails was an innovative strategy that pulled volunteers into the campaign.

E. Video

BARNS FOR OBAMA

OFA's 15-person video strategy team was directed by Kate Albright-Hanna, who left CNN to become the Director of Video in Obama's new media juggernaut. By October 2008, her team had posted over 1,800 videos on the campaign's YouTube account.[16] The Obama campaign's videos had racked up 889 million views. That translates into 4.6 million hours of viewing time. Put into real dollars, that is equivalent to $46.9 million in 30-second TV spots.[17] (Compare that to John McCain's campaign, which posted just over 330 videos on YouTube by October 2008).

The official numbers also pale in comparison to the unofficial video content posted about the candidates from outside the campaigns. Across 200 video platforms (including YouTube) there were over 104,000 videos mentioning "Barack Obama" and more than 64,000 mentioning "John McCain."

How did the Obama campaign handle all of that external content about its candidate? What was the strategy behind the production and distribution of video content? Nonprofits can learn a lot from the answers to these questions. Below are the cornerstones of the new media team's video strategy as well as tips and best practices that nonprofits can put to work. (The Obama campaign video archive can also be found online here: http://www.youtube.com/profile?user=BarackObamadotcom&view=videos.)

A Journalistic Approach

The vision for the use of video by OFA was very different than past presidential campaigns. That's because, according to Kate Albright-Hanna, Director of Video, "We weren't selling the candidate like a product. Instead we simply covered the movement around the campaign." Given her background at CNN, Albright-Hanna

---

[16] http://www.youtube.com/profile?user=BarackObamadotcom&view=videos
[17] Rasiej, Andrew and Micah Sifry. "The Web: 2008's Winning Ticket." Politico.com 12 Nov. 2008 <http://www.politico.com/news/stories/1108/15520.html>

espoused a journalistic approach to video, inviting individuals to tell their own stories and talking directly *to* people, not *at* them. The goal was to engage people, draw in viewers and make them feel like they were part of something big.

Local Real-World Stories

The video team set out to highlight what was truly going on in the country – not just to sell a candidate. In order to locate people to tell the story of the movement, the video team worked very closely with the field team. The field staff was ideally situated to funnel real people and their compelling stories up to the new media staff.

MISSOURI CANVASSER

For example, a field worker in Colorado interviewed Charles Alexander, who talked about the passing of his wife, his generation and how young people are now giving him faith. The video included footage of Alexander's once-in-a-lifetime meeting with Barack Obama himself. It was a pretty raw video with little post-production, but it went viral. To date it has been viewed more than half a million times.

Forget About Control

Micah Sifry, Editor of Personal Democracy Forum, put it this way: "You aren't 'giving up' control, the control is already gone when it comes to the Web."

There was no way to control the tidal wave of video content about their candidate, so the Obama team simply ignored just about all of it and focused resources on producing their own exceptional videos.

When a good video did crop up outside the campaign, such as the will.i.am "Yes We Can" video, the campaign helped promote it. The strategy was simple: highlight the good content that aligned with the campaign's values, and ignore the bad.

Exclusive "One-on-One" Reports

David Plouffe's raw strategy updates "from the frontlines" were a huge hit with campaign supporters, according to new media staffers. They were also particularly successful fundraising vehicles. "We wanted people to feel like he was talking directly to them about the game plan," said Kate Albright-Hanna, Director of Video.

The very best examples of the Plouffe videos provided exclusive information that supporters couldn't find elsewhere in the media. This buttressed the campaign's goal of talking to supporters one-on-one and making them feel like they were right there alongside key campaign staff every step of the way.

The video team always aimed for authenticity during production, recording the videos on the spot with no special equipment and not employing slick post-production editing.

Nonprofit Takeaways

- **Speak to your supporters directly.** Put your own staff in front of a camera and give your supporters information they can't find anywhere else. Draw them into your work and engage them as an important part of your movement. Don't just tell your supporters they are important, treat them like they are.

- **Record passionate volunteers.** If resources are tight and your staff is stretched thin, make sure you have the channels in place to find someone like Charles Alexander who can talk about your issue from the heart. There is no way to place a value on this kind of raw authenticity. Make sure your organization puts infrastructure in place that will find and highlight the Charles Alexanders of the world. The passion and emotion that drives people to care about your mission is out there. Find it and press "record."

- **Produce a lot of video.** The campaign made 1,800 videos. Not all of them were exceptional. But rather than spending six months producing a single perfect video, Arun Chaudhary, New Media Road Director, recommends, "Think broader. If you just have enough video, some of it will spark."

F. External Social Networks

Facebook, MySpace, Twitter, and other social networks played a crucial role for the campaign by building a tangible grassroots mentality. These networks helped to create a sense of a bottom-up community by giving people the tools to host events, share enthusiasm with their neighbors and organize where they lived.

Obama was also the first candidate to have profiles on more niche social networks including AsianAve.com, MiGente.com and BlackPlanet.com, which helped seek out Asian, Latino and African American voters.[18] However, the campaign was deliberate. They selected fewer than 20 social networks and kept their efforts focused.

In the end, about five million supporters were engaged with the campaign across all external social networks. However, despite this large volume of supporters, it does not appear that this yielded significant returns in terms of fundraising or volunteerism. Stephen Geer, Director of Email and Online Fundraising, explained, "From a fundraising perspective, external social networks are not a good use of time. No one has ever really cracked that code."

Many staff noted that the real value of the social networking was in branding and visibility, which are more difficult to measure.

Scott Goodstein, External Online Director, explained his theory that "social networks are part measurable, and part radio." Like radio, it is difficult to track responses to individual promotions via social networks. Goodstein also suggested that the focus of social networking should not be on driving people to join your email list. "It's not about joining the email list. It's about distributing the message."

Staffers were quick to point out that, even without a significant direct marketing return on investment, social networking *should* be a part of a nonprofit's new media strategy—but with caveats:

> "If you are running a campaign and you push it from 18 different places, it's going to be better. But if you have to pick one, growing your email list is going to be a better use of your time."
>
> *- Judith Freeman, New Media Field Manager*

---

[18] Vargas, Jose Antonio. "Obama's Wide Web." The Washington Post 20 Aug. 2008: C01

"Don't get attached to any one social network. Look at what is happening in your own community, look at what social networks your community is already in, and then design your social networking strategy to go there."

- Scott Goodstein, External Online Director

The new media team had interns and paid staff that monitored content, posted comments and managed dozens of social network accounts. In a nonprofit context, resources are likely more scarce than they were for the Obama campaign.

Nonprofit Takeaways

- **Don't expect a large, measurable return on investment.** If your goal is branding and visibility, social networks can be incredibly valuable. But if you are seeking to raise money or recruit large volumes of volunteers, your resources may be better spent on other tactics with a higher return on investment, such as email marketing or website optimization.

- **Be selective.** Goodstein advised that nonprofits "[shouldn't] adopt a tool until it has a critical mass of its own." What is shiny and new *now* may not be hot later. (MySpace is as an example of a once-popular tool that is now falling out of favor).

- **Do it right.** If you are going to be present on Twitter or Facebook, dedicate real resources to providing a steady stream of content, responding to supporters and engaging in the social network.

G. My Barack Obama

My.BarackObama.com was an online community toolset provided by the campaign that allowed supporters to form their own groups, make phone calls from home, organize their own house parties and events, and run personal fundraising campaigns. The campaign's blog was also hosted on this tool. The number of participants was big – two million profiles.[19]

Even with a huge potential audience, My.BarackObama.com (affectionately called "MyBO" by new media staff) proved expensive to build and maintain.

The group functionality on MyBO spurred the creation of affinity groups like "Dental Hygienists for Obama" and "Houston for Obama." These groups were particularly valuable to the campaign when it entered a state with paid field staff for the first time, as they allowed the campaign to quickly identify the most committed volunteers.

Using MyBO's self-directed fundraising tools, 70,000 individuals collected $30 million – an impressive total, but still just 6% of the total $500 million raised online.[20] This type of fundraising is often referred to as 'personal fundraising' and it involves giving your supporters online tools they can use to raise money from friends and family, and track the results. Personal fundraising has been shown to be very effective for health nonprofits that use it to enable fundraising for walk-a-thon type events.

According to field staff we spoke with, the phone calls made through the MyBO toolset represented a tiny fraction of the calls actually made by the campaign; the majority of the calls were made through the field effort. Data on the total calls made via MyBO was not readily available, but some sources reported that it was "millions." [21]

National Field Director Jon Carson explained: "No matter where new media goes, you are never going to change the human trait that we do the most work in groups. The notion that people are going to log onto their computers and be a part of the campaign as an individual in their home did not bear fruit at all… One volunteer inside a campaign will do 50 to 100 times more actual voter contact than someone sitting at home."

---

[19] Ibid.
[20] Talbot, David. "The geeks behind Obama's web strategy." The Boston Globe 8 Jan. 2009.
[21] <http://www.bluestatedigital.com/casestudies/client/obama_for_america_2008/> and Havenstein, Heather. "My.Barack.Obama.com social network stays online after election." ComputerWorld.com 10 Nov. 2008 <http://www.computerworld.com/s/article/9119718/My.BarackObama.com_social_network_stays_online_after_election>

On the other hand, Natalie Foster, National Director of Online Organizing for the Sierra Club, found these online tools invaluable in non-swing states. "For the first time ever we were able to engage the whole country."

In addition to the cost of the tools themselves, the campaign dedicated significant resources to staffing this program. According to Nikki Sutton, New Media Constituency Coordinator, early in the campaign they would make a phone call to every person who signed up to do personal fundraising, welcoming them to the program. They held weekly conference calls with the phone volunteers and the personal fundraising volunteers to help keep them motivated and engaged. Running this program required significant staff and intern hours.

Nonprofit Takeaways

- **Virtual field organizing is unlikely to rival real-world field organizing in the near future.** Office and field staff working on the ground will recruit more volunteers than virtual outreach. However, using online tools to generate phone calls and other volunteerism may still be productive if traditional field work simply isn't an option.

- **Personal fundraising for political campaigns is not yet as effective as direct email fundraising.** While we do see many event-oriented nonprofits raising significant funds online via walk-a-thons and bike-a-thons, nonprofits that launch personal fundraising programs without these events or types of causes may not see dramatic returns. In fact, simply sending another email or two to your in-house email list may yield as much revenue as launching a personal fundraising program, at a much lower cost.

- **There is no need to build your own online community.** Many of the staff we spoke with specifically recommended that nonprofits look to leveraging existing online communities like Facebook and MySpace, rather than trying to create their own online community. That MyBO was successful was likely a "one-off anomaly," according to Jon Carson, National Field Director.

H. Mobile Text Messaging

Let's face it – nonprofits rarely have an announcement as important as who the next Vice President of the United States might be. Short of having a big secret to reveal to supporters who sign up, how can nonprofits leverage mobile text messaging as a tool to achieve their missions?

The answer is still evolving, but the reality is that mobile phones are getting more powerful and they are in the hands of a whopping 87% of Americans.[22] Of those, 52% actively use text messaging.[23]

Early in the campaign Joe Rospars said, "I don't think there's a campaign or a political organization right now that has figured out how to smartly use [mobile] technology. There's going to be a lot of experimentation." [24] For one thing, a text message incurs costs for supporters depending on their cell phone plan. But it was a tactic that aligned nicely with the campaign's goal to connect in a more personal way with supporters.

Aside from the V.P. announcement, the campaign also sent general text messages like this one sent on July 23, 2007: "Watch Barack debate tonight live on CNN! 7pm EDT. REPLY back with your name and your thoughts during & after the debate."

Once the list of mobile supporters reached critical mass, the campaign was able to geo-target. Before the Pennsylvania primary, the campaign sent this text: "Help Barack get out the vote in Pennsylvania! If you can get to PA between now and 4/22, REPLY to this msg: TVL and your NAME (ex. TVL Ann). Please fwd msg."[25]

Stephen Geer, Director of Email and Online Fundraising, had this to say about mobile text messaging: "You can reach people and groups that just aren't online. It has huge potential. Our text list was probably the first political list that was truly big enough for geo-targeting. For example, on Election Day, we could text people in a state where polls were overwhelmed and voters were waiting in line and say, 'Stay in line! The polling hours are being extended to be sure everyone gets to vote.' That person could tell others in line to stay."

---

[22] <http://ctia.org/advocacy/research/index.cfm/AID/10323>
[23] "Obama's V.P. Text Message Reaches 2.9 Million." [Weblog entry.] Nielsen Wire. The Nielsen Company. 26 Aug. 2008. <http://blog.nielsen.com/nielsenwire/online_mobile/obamas-text-message-reaches-29-million-and-makes-history/>
[24] Vargas, Jose Antonio. "Text-friendly hopefuls vie for hearts and thumbs." The Washington Post 30 June 2007: A01.
[25] Vargas, Jose Antonio. "Obama's wide web." The Washington Post 20 Aug. 2008: C01.

Geer went on to add that "mobile did not have a major fundraising role, but there are technologies on the horizon that will boost that. And like social networks, there's undoubtedly a synergistic effect, but it's not something we tested extensively."

The historic nature of a political campaign like Obama's allowed for more adventurous experimentation in text messaging. The role of mobile messaging in a nonprofit's strategy continues to evolve.

Nonprofit Takeaways

- **Give it time.** Mobile text messaging is just now reaching a critical mass that would allow it to be an effective tool for nonprofits. Although it may make sense to invest in it now, don't expect it to rival email any time soon as a driver of activism and fundraising.

- **Make it relevant.** Mobile text works best in incredibly time-sensitive moments when there is a logical reason for sending a text message. If you're launching a mobile text program, make sure your texts are all very timely and relevant.

- **Integrate with other channels.** OFA collected cell phone numbers via the website, while the mobile text examples above promoted very concrete offline activities. Don't expect your mobile text program to stand alone.

CONCLUSION

The Obama for America campaign took place at a unique moment in history and achieved unparalleled success online. Since that time, the context of online organizing has continued to change. Much of the campaign took place before the worst of the economic downturn, and the climate for *all* fundraising has since become much more challenging. And in the past six months, we've seen social networks like Twitter continue to explode, and others, like Facebook, make their tools much more accessible for nonprofits. So, although much can be learned from OFA's successes (and failures), what was true for the Obama campaign six to 12 months ago simply may not be true today.

As you consider this report's findings, please also bear in mind that our report focused more deeply on online fundraising results because those were so significant, visible and relatively easy to track. However, many of these tactics can be applied to other organizational initiatives, ranging from advocacy to public education to volunteer engagement.

With all of this in mind, nonprofits should consider this report simply as a jumping off point – not an end point – for developing their own top-notch, data-driven new media programs. Rather than restricting your program to adhere rigidly to any 'best practices' established by Obama for America, you should use this report to help identify the elements of your online program that need to be tested. Don't be afraid to invest in new strategies and tactics: as long as you know what you want to accomplish, and track your results, you'll always get useful information that will allow you to continually improve your program.

METHODOLOGY

In conducting our assessment of OFA's new media program, M+R relied primarily on two methods of information-gathering: conducting interviews with key campaign staff and outside experts, and collecting data from a variety of sources, including the Federal Election Commission.

Interviews were conducted over a period of two months; most were conducted in person in Washington, D.C., others were conducted by phone. Information and data gathered from background research was used to develop an initial interviewee list and a set of questions to guide interviews. Both guiding documents were refined and expanded in response to new information gathered during each interview. All of the interviews were conducted by Sarah DiJulio, Executive Vice President and director of M+R's online division, and Andrea Wood, Senior Online Consultant. Together, Sarah and Andrea have more than a decade of experience developing and executing online advocacy and fundraising strategies.

Individuals interviewed for the assessment were offered confidentiality in order to ensure candid input. When possible, M+R provided attributions for quotations in this report.

After the completion of the interviews, M+R staff compiled results and extracted major findings related to the primary objectives of this study.

INTERVIEWEE LIST

Name	Campaign Title	Current Contact Information (if provided)
Albright-Hanna, Kate	Director of Video	News Director, VBS.TV albrighthanna@gmail.comkate@vbs.tv
Bird, Jeremy	Ohio General Election Director	
Bleeker, Andrew	Director of Internet Advertising	New Media Director, AKPD Media www.akpdmedia.com ableeker@akpdmedia.com
Carson, Jon	National Field Director	
Chapman, Amy	Michigan State Director	
Chaudhary, Arun	New Media Road Director	
Ewald, Marie	National Programs and Fundraising Manager for Email	
Freeman, Judith	New Media Field Manager	Co-founder and Executive Director New Organizing Institute www.neworganizing.com judith@neworganizing.com Phone: 202-210-3924
Geer, Stephen	Director of Email and Online Fundraising	Vice President for New Media, OMP Direct www.ompdirect.com, sgeer@ompdirect.com Phone: 202-467-5137
Goodstein, Scott	External Online Director	Founder, Revolution Messaging, LLC www.revolutionmessaging.com scott@revolutionmessaging.com Phone: 202-256-8320
McCormmach, Alexander	New Media Analytics Developer	
Siroker, Dan	Analytics Lead	Co-founder, CarrotSticks, Inc. dan@siroker.com
Slaby, Michael	Chief Technology Officer	Chief Technology Strategist TomorrowVentures michael@tomorrowventures.com
Sutton, Nikki	New Media Constituency Coordinator	

Non-staff interviewees

Name	Campaign Title	Current Contact Information (if provided)
Exley, Zack	Co-founder and President New Organizing Institute; Strategic Consultant, ThoughtWorks, Inc.	
Foster, Natalie	National Director of Online Organizing, Sierra Club	
Podhorzer, Mike	Deputy Political Director, AFL-CIO	
Sifry, Micahel	Editor, Personal Democracy Forum	msifry@gmail.com