

Guidelines for Using Technology in Community Organizing

These are Progressive Technology Project's guidelines for the wise use of technology in the community-led organizing context. They are drawn from PTP's publication: [From Exclusion to Inclusion: Strengthening Community-led Organizations with Effective Technology and from technology notes on PTP's web site: \[www.progressivetech.org\]\(http://www.progressivetech.org\)](#)

Technology in the community organizing environment encompasses just about every element of organizing. Organizing technology use includes:

- Databases to track members and supporters, contact touch points with members, event management, donation outreach and donation history, civic participation history, leadership level. While there are multiple solutions to accomplish these tasks, most require a modification to meet organizers' needs. This is an obstacle to adoption because it increases the amount of effort required for the preparation. That's why PTP has developed Powerbase, an open source database software for organizing, that has these features. It can:
 - Track member involvement and leadership development over time
 - Track relationships with allies, volunteers, donors, media, elected officials, funders, etc.
 - Track donations
 - Track events
 - Capture information seamlessly from organizational websites
 - Create reports
 - Create lists for mass communications
 - Track voter contacts
 - Adapt its interface for various languages
 - Interface with voter files
 - Create maps of contacts with addresses
- Communications and messaging software and devices such as projectors, video cameras, and simultaneous translation equipment.
- Message delivery systems including
 - Social Media such as MySpace, Facebook, YouTube and Twitter
 - Blogs, web sites, e-mail
 - Video production
 - Newsletters
- Basic office software including spreadsheets, word processing, and financial accounting

Using the technologies on this list can help organizers increase their reach and effectiveness, but they can also interfere and distract from the main goals of the organization if used thoughtlessly.

Guidelines

Plan:

"Cheshire Puss,[...] Would you tell me please, which way I ought to go from here?"

That depends a good deal on where you want to get to, said the cat.

I don't much care where, said Alice.

Then it doesn't matter which way you go, said the cat.

... So long as I get somewhere, Alice added as an explanation.

Oh, you're sure to do that, said the cat, if you only walk long enough"

— Lewis Carroll, (Alice in Wonderland)

Organizers know that winning organizing campaigns are carefully planned. Growing organizations use strategic and tactical planning to change and adapt to the environment that they are in. Fundraising efforts without a plan bring in less money. As part of planning done for the organization, campaigns and fundraising, successful organizers should integrate information technology planning into the planning process. PTP can provide tips on planning for specific needs.

Assess:

"Looking at the past must only be a means of understanding more clearly what and who they are so that they can more wisely build the future."

— Paulo Freire (Pedagogy of the Oppressed)

Just as organizing campaigns are assessed as to their effectiveness, so too should the team reflect on the information technology components of the campaign and the organization. Suggestion: include technology assessment as a regular component of all organizational reviews. At minimum, all technology use should be reviewed and assessed once a year.

Vision:

"People only see what they are prepared to see." — Ralph Waldo Emerson

Technology changes quickly. Some changes are significant to organizing but most are not. Organizing groups do well to have some people on staff who have enough interest in the subject to track what's new and worthwhile. At PTP, we have a name for this role: the technology "visionary."

Models of Use:

There are organizing groups that have developed replicable models of the strategic use of technology. Organizers should embrace a collaborative approach to sharing and learning from other organizations in their network or community. Whether there is a "visionary" or not, the executive director must allocate a portion of her time to learning how similar organizations are using technology.

Staff and Time:

All the planning and preparation will be wasted if there aren't people with the time to execute the plan and support the technology. Organizations need to invest staff time and funds to maintain a reliable base of equipment and updated software.

External support:

It's close to impossible for a community organizing group to have on staff people with all the technical support and training that they require. We suggest that organizations build relationships with technical support organizations, technical trainers and software consultants. External support can come from organizational supporters with a technology interest, commercial support providers and movement allies like PTP. While it's relatively easy to locate someone who can set up a computer network, it's far rarer to find someone with technical knowledge who is also familiar with the work of organizing. This is where PTP comes in. PTP provides multiple opportunities to learn about technology as it is used by community organizing.

Training:

Getting new hardware and software in is less than half the battle. Organizations should invest in cross-training, external training and self-teaching opportunities for their staff. Especially useful is training designed for the specific needs of organizers. PTP has found that peer-to-peer learning can fill the gap when targeted training is not available. Organizers are eager to share their experiences with their peers. Every annual organizational plan should include training for new and existing staff. It's also important to take advanced training even for people who have mastered a particularly piece of software because it gives them an opportunity to master new uses of the software.