

## **Offline-to-Online-to-Offline: Lessons Learned in Building a Custom Community Platform**

**By Garth Moore with Michael Silberman and Liz Butler**

**Based on Interviews with staff at 1Sky, Clean Energy Works, Energy Action Coalition, and Focus the Nation.**

### **Our Story**

Recently, four allied grassroots campaigns (1Sky, Clean Energy Works, the Energy Action Coalition and Focus the Nation) set out to build an unprecedented online community: multiple organizations engaging their supporters together toward common goals on a shared online platform. We called it “The Climate Network.”

Despite a significant financial investment and hours of planning, coding, reviewing, designing, outreach, and training to make the project a success, we were ultimately unable to achieve what we hoped. The ambition of the online organizing platform never matched the success of the offline organizing community and strategy. After 12 months, it folded.

*What happened?* A number of things didn’t go as planned, despite the best efforts of these four organizations, their staff, and several of our best and most active online community members. However, almost everyone involved with the project said if they could do it again, they would, with the right planning and preparation.

If your nonprofit, campaign, movement, or cause is considering developing an online grassroots organizing model or a custom online community tool to support your advocacy or organizing efforts, then we hope our story will help you avoid some pitfalls, and achieve ambitious online organizing goals.

### **What was the original vision and mission behind the online community we hoped to build?**

In 2008, 1Sky and several climate activists began planning to create an online community platform to match a bold vision of enabling and amplifying a climate activist voice in each of the more than 300,000 voting precincts nationwide.

The goal was to create a unified online community for the climate movement to reflect and spur more of the movement’s offline collaboration. Specifically, the intent was to:

- Provide local groups and organizers with the tools they needed to meet and recruit new people, post events, host discussions, and give their efforts an online voice and platform to support their offline work;
- Provide volunteers and organizers with a one-stop shop for the suite of organizing tools they needed to do their climate movement building;

- Create political pressure by documenting and mapping the movement for legislators to see who cares about climate in their local areas; and
- Give climate campaign partners a custom-branded platform for community organizing via their own websites.

With all of these tools powered by a unified back end, each organization would share supporters and content in a networked community to reflect the unity of the movement – a bold, new vision for a community platform.

### **We created a plan of action:**

We wanted to create an online community platform for groups and top organizers to post events, discussions, photos and videos, and share their content with groups across the platform. The platform could be branded for any partner campaign, so each partner would get their own branded platform and everyone’s supporters would work together in a common, shared online space.

The Climate Network leadership found a technology team who could customize their online “groupware” tools, which was already developed to support individuals and groups working together. There was no formal request for proposals (RFP) for the project, but several developers and approaches were considered—from custom open source to commercial packages—and references were checked before we decided to proceed with a developer in whom we felt confident.

Other features were proposed to visually document the movement for leaders and legislators to view, such as maps with event pins, videos and photos from offline events, and discussion boards for every political district. Additionally, the platform would link to, share content with, and recruit from social media sites.

### **What went wrong?**

The process began in 2008 as the political and economic landscape was shifting. Social networking was expanding to a larger audience. The climate movement began to open up to new voices and groups.

The Climate Network leadership created a vision of the online strategy with real-world goals and tactics to help supporters use the power of the Web to build and empower their local networks.

- Initially, the project vision came from one group (1Sky) and not everyone was on the same page. Project leaders came and went, bringing in their own ideas and quickly changing the management process from “let’s get started” to “what’s going on here”
- One problem was that the project started with a focus on internal goals, requirements, and planning; external audiences and intended users were not consulted thoroughly regarding which platforms and features would interest

them and help them succeed.

- Another challenge was that the technology vendor made many promises that their platform could easily facilitate this type of community, when it actually wasn't ready for prime time. To be fair to the vendor, the partners also began changing feature requests towards launch—always a bad way to watch a project spin out of control. Unanticipated development and customizations took up additional time, money, and staff energy.
- Many of the features key to the original Climate Network vision weren't there at launch, including event mapping, social network links, and photos and videos across a shared platform. Since we did not get the features built during launch, we played catch-up trying to integrate them into the platforms post-launch.
- There was no plan or budget available from Climate Network partners for marketing and promoting the network with existing supporters and new audiences beyond a series of emails (and navigation updates to partner websites). It was typical problem of, "Build it and they will come." There were many reasons for this: a lack of capacity, small budgets for marketing and promotions, and an unfounded confidence that the network would build its own word-of-mouth and adoption rates would be high. This early optimism was fed by a political strategist with experience running a successful grassroots organizing and Internet strategy for a presidential campaign – a very different landscape.
- Once it launched, the platform was problematic. Functionality wasn't running smoothly, users complained, and staff and volunteers lost their willingness to support the platform with their offline actions. Offline organizing was succeeding, but not with any help from the online world and with very little interest from organizing staff to help promote it or bridge to it.
- When partner organizations came on board, they found the platform was messy, expensive, and underwhelming. The user interface was not intuitive and there was nothing uniquely interesting or engaging within the features for their supporters to build or sustain interest.

### **We tried to correct our plan.**

We decided to go back to the drawing board and spend five months outlining and re-launching the network. We gathered our user comments, skimmed our budgets, and planned for the interface changes that we thought were necessary based on feedback we were getting. What we saw next:

- The technology vendor continued to be slow to develop new functionality, taking days to make small fixes. They continued to rollout ill-conceived user interface designs with no in-house designers on board to create the look for it.

To their credit, the vendor ate a ton of fees and services to make big fixes because of these mistakes. They just didn't have that nimble, fleet-footed developer's touch that is required with social media tools. They couldn't make these tools nice to look at, easy to use, or robust enough to connect with other external networks.

- Even after relaunching, we didn't have sufficient internal resources or budgets to train existing users; new users still weren't confident or motivated to use the platform; staff didn't support the platform because of its challenging history; and the lack of marketing to new audiences didn't bring anyone new into the community.

In the end, many of the managers and organizations said if they could do the project over again -- with new budgets, vendors, and even additional staffing and resources -- they would. As one partner said, "This network model should have worked!"

### **What could we have done differently to make this project a success?**

- **Listen to your audience** – Getting those initial requirements from our audiences to meet their needs, instead of assuming needs on their behalf, would have helped us develop a platform that they actually would have used. Talking with supporters right from the start would have helped us get their buy-in for testing and promoting the platform. We might have even anticipated their needs and given them something they didn't even know they wanted, but liked. These are some essential sources for information: social networks, blogs, interviews, surveys, polls, and in-depth interviews.
- **Be visionary, but be realistic** – You may have a unique concept that no one else has ever envisioned before, and that's great. However, be mindful of what you are trying to achieve and how to get there. What impact are you trying to create? What goals are you trying to achieve? How will you engage your local communities and supporters? How are you helping them succeed in their own communications and community building? If you can sell the big vision, sell it. Then temper your expectations after listening to create smaller, bite-sized goals that your community can achieve. It should be clear how these smaller goals and milestones add up to the bigger vision, but the lessons from these smaller tests may increase your chances of successfully arriving at the ultimate destination.
- **Get internal buy-in** – You need your staff to be on board to develop, support, and champion a project. If your staff doesn't understand or support the project, the project will fail because of they won't know how to support it, won't want to support it, and won't want to help spread the word about it. Your staff can always be your biggest champions and when they're proud of a project, they'll tell everyone they know about it. This goes for your board, your

top volunteers who may be very close with the organizations, and your funders. Get them all buzzing about it and the word can spread like wildfire. Having everyone on the same page is critical for success.

- **Partner with good technologists** – Make sure your tech vendor is sharp, savvy, and completely shares your vision and has the ability to make it happen. If they can build with a free tool or can build at costs, even better. For larger projects, make sure their design and network acumens are forward-thinking. A good developer will listen carefully, interview all stakeholders, plan everything down to the last detail then build quickly and cheaply. Plus, they can turn around small projects post-launch with little difficulty and they prefer open source projects so other can develop with them.
- **Develop the most essential features first** – Make sure your top supporters, staff, and technologists all understand what the most essential requirements for success are and build them in right off the bat. Don't think you'll get to it later, because you either won't or you will pay a lot to get it done. For example, if supporters say they want to connect to a highly popular social networking platform like Facebook to tap into their networks, get it in first.
- **Make it look good** - Usability and design are just as important as the technology. If people can't understand what you are trying to do upon first glance, they're likely to sustain little interest in your website. The software can have all the features in the world, but if it doesn't have the user experience to back it up, good luck trying to get anyone to use it. Be sure to invest time, money and focus on having a simple, highly intuitive interface.
- **Test everything** – Don't expect your staff and technologist to do all the testing; they'll inevitably miss something or jump to a conclusion or justification so they think it will work. Ask five or six supporters to walk through it. Look over their shoulder if possible. Does it work? Do they like it? Can they use it? Would they use it? These supporters can inform the process and even champion the platform as they become part of the testing cycle. Even a small step like adding the word "Beta" to your project or logo tagline will help obtain buy-in and smooth expectations during the rollout process.
- **Budget for outreach and marketing** – Nothing grows in a vacuum and unless your supporters and new audiences see your platform being used, see it promoted on places they visit online, and know about it in all your offline and event materials, they may not know it's there. Don't rely only on a couple of full-list emails and few Facebook posts to promote. Make a list of where you can promote your community platform, get quotes on how much it will cost to promote your network vision, create a budget, and then start promoting it. Try to get some free word of mouth from other organizations, partners, and friends. Expect to pay a little to get attention as well.

Above all, ensure that you have clear and compelling reasons to talk about the new platform, beyond the technology itself. There's nothing newsworthy or interesting about new web tools – but if your mission and campaign is irresistible enough, then outreach and marketing efforts can help accelerate adoption and interest in your campaign (and your community platform by extension).

- **Budget for future development** – So, you've built it, tested it, and promoted it. But there will be fixes and new features and they will come with a cost. Save some budget for future development for at least 12 months, and set up a quarterly review and development cycle to make improvements based on supporter comments and new tools that come into play. Make sure any real bugs that occur are handled quickly and cost-effectively. Many hosted software providers build support into their contracts; make sure that you're not paying for their mistakes, only future development.

In the end, we learned what many organizations and causes have already learned about building an online community: it's tough to gather your supporters together, engage them in meaningful activities that help achieve your mission, and keep your campaign fresh and inviting for new supporters and community members.

Given the continued enthusiasm for the project from all partners and the lessons learned, the project was not a failure. All the partners continue to build online communities and engage their online supporters in impactful offline activity. 1Sky recently relaunched its Get Local platform at <http://www.1sky.org/local> with organizer content and event tools based on volunteer feedback. Through this streamlined system, 1Sky's grassroots organizers can easily share their events announcements and post-event stories with their online social networks and other volunteers and showcase the true breadth and depth of the movement.

We hope our story will help keep your community building efforts on the path to success and enable you to avoid a few hurdles along the way.