# NDI | Technology – A Planning Guide for Political Parties

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New information communication technologies (ICTs) can help political parties improve outreach, data management, administrative processes, fundraising efforts, and internal and external communications. However, incorporating new ICTs is a complex process. The wide range of options available can be difficult to navigate, projects have hidden costs or take longer than expected, and many political parties lack the expertise to implement or maintain them. As a result, many ICT projects fall short of expectations or fail altogether. ICT projects primarily fail because implementers: underestimate the budget for the time and/or resources required to deploy and maintain ICTs; lack the expertise, capacity or motivation to use the ICTs to their potential, especially if it requires staff to change their daily behaviors; or have unrealistic expectations regarding what the ICTs can accomplish. Launching new ICT's can be an incredibly beneficial project for political parties, but unless care is taken, they can also end up being a drain on staff time, resources and money with minimal return. In short, successful technology projects don't "just happen": they are the product of careful planning, good management and clear goals.

Even the simplest, easiest to use, "free" new ICTs require significant time and financial resources to deploy. For instance free Facebook pages or Twitter accounts require staff time to manage, to consistently find and post interesting content, and engage target audiences. Further, those staff must be trained in social media and basic PR best practices, as there are many instances of social media *faux pas* embarrassing political parties and political leaders. More complex projects may carry significant up front costs, and even more long term expenses as software needs to be updated, staff trained and infrastructure maintained. Understanding the long term implications and cost of a tech program can help ensure a party has the required resources available. Additionally, targeting clear, specific and measurable goals are all critical components of successful ICT deployments.

Further, many organizations, including political parties, overestimate the capacity of ICT tools to improve performance shortcomings. For instance, a political party struggling to connect with voters at the local level may turn to social media in an attempt to reach more people. However, the party's outreach struggles may be the result of a failure to understand citizen concerns at the branch level or a breakdown of internal communications between the branches and headquarters. In either of these cases social media tools alone are unlikely to provide a complete solution. New ICTs can be a powerful tool for disseminating messages, but if those messages don't resonate with the public, then the party needs to work on connecting with their constituents before engaging in social media advertising. Further, it may be tempting for political parties to view ICTs as a solution to complex, deep-rooted problems when it may be more productive to address deeper organizational or ideological issues before turning to ICTs to help their performance. For instance, if branch office leaders are unwilling to share member lists with the national headquarters because of power dynamics or lack of trust, then a new high tech member database is unlikely to help.

Careful preliminary analysis, strategic goal setting, planning and management can help to prevent many of these common problems. This website is an attempt to gather best practices for the deployment of new technologies in a single resource, presenting a strategic approach to choosing new technology projects.

The section on how technology can help discusses the possible applications of new ICTs in three core areas of party organizing: outreach; policy development; and management. This section provides a broad overview of how new ICTs can help parties to better perform their key functions and is an ideal starting point for parties beginning to explore new ICTs, and types of tools that may help. The chapter on core concepts discusses key ideas in political party technology, including databases, the most basic political organizing tool, and security. The preliminary analysis section outlines the types of analysis and decisions that should be conducted prior to deploying new ICTs including: problem analysis; goal setting; what types of technology can help; and selecting specific tools. Finally the toolbox discusses various types of tech tools, key considerations, benefits and possible pitfalls of each.  In addition case studies on successful, and less successful, political party ICT projects around the world are included and more will be added in the future.

# Key Takeaways

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### How Technology Can Help

The

Preliminary Analysis for Technology section of this paper outlines three core areas of party activity: outreach, policy development and management. It provides some key assessment questions to help a party evaluate its performance in each and set appropriate goals. Once a party has determined its area of focus, this section can identify some of the ways in which technology might help the party achieve its goals. These sections discuss outreach, policy development, and party management in more detail, and outline how new technologies can help a party improve its performance in each area. Each section contains links to different elements of the toolbox, which explores specific tools in more detail and gives case studies illustrating how political parties have successfully, or unsuccessfully, tried to solve similar problems.

Many tools apply to more than one party operation. For example, a database is one of the most basic political organizing tools, and a party can use it to improve outreach, track member and constituent concerns as part of the policy development process, and help manage party interactions with volunteers and members[1]. The matrix below shows each core area of party activity along with subcategories and links to some applicable tools.

ICT TOOLS

| FUNCTIONS | Constituent Mgmt. | Email | SMS | Intranets/ VPNs | Mobile Phones | Office Apps | Online Advertising | Radio | Social Media | Websites |
|---|---|---|---|---|---|---|---|---|---|---|
| **OUTREACH** | | | | | | | | | | |
| Voter Contact | • | • | • | | | • | • | • | • | • |
| Supporter Contact | • | • | • | | • | • | • | • | • | • |
| Member Contact | • | • | • | • | • | • | • | | • | • |
| Targeting | • | | | | | | • | | | |
| GOTV | • | • | • | | • | | • | • | | • |
| Message Development | • | • | • | | | • | • | | • | |
| **POLICY DEVELOPMENT** | | | | | | | | | | |
| Identifying Citizen Needs | • | • | • | | • | • | • | • | • | • |
| Research | • | | • | | • | • | • | | • | • |
| Drafting Policy | • | | | • | | • | | | • | • |
| Policy Approval | • | | | • | | | | | | • |
| Policy Communication | • | • | • | • | | • | • | • | • | • |
| **ORGANIZATION** | | | | | | | | | | |
| Internal Communication | | • | • | • | • | • | | | • | |
| Communications from Supporters | • | | • | • | • | • | | | • | |
| Management | | | • | • | | | | | | |
| Knowledge Management/Archives | | | | • | | | | | | |
| Training | • | | • | • | • | • | | | • | • |
| Budgeting/Party Finances | • | • | | | • | | | | | • |

## Key Takeaways

**How Tech Can Help**: With creativity, technology can amplify a party's outreach, policy development, and management efforts in an efficient and cost effective way.

**Outreach**: Communication facilitates political participation for all citizens and opens a dialogue between party leaders and members. Technology can help party outreach by mobilizing current supporters, attracting new ones, considering member opinions, distributing party messages, and managing party communications from members and constituents.

**Policy Development**: Technology can help a party propose policies representative of its members by soliciting input directly from them, creating databases and polling tools for policy research, facilitating policymaker discussions (e.g., through Google Hangouts), allowing for member feedback and/or approval, and communicating policy positions to members.

**Management**: A party must have an internal organization system, including procedures for communicating internally, managing resources, making decisions, tracking members and activists, managing internal knowledge, and training staff and members. CRM software such as NDI's CiviParty tool and more can help a party accomplish these tasks.

[1] Parties around the world rely on party members and volunteers to conduct outreach and conduct other day-to-day party activities. Recruiting and managing them is an integral component of party operations, and as such they are discussed at length on this website. Because most parties operate on a membership model, that is the term used by default on this site except when referring to a specific party.

# Outreach | NDI

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**Outreach**

### How is Outreach Important to Parties?

In order for parties to remain effective and relevant to the democratic process, they need to be able to conduct robust outreach and invite two-way communication. Communication provides avenues for broad political participation and can open a dialogue between party leaders and party members, as well as with citizens in general. As technology has evolved, politicians and political parties have found new ways to communicate. That process began with newspapers and continued to grow with radio and television. Today, in the internet age, parties can reach out to more constituents than ever and spread their messages faster and farther than before.

A party can conduct outreach through community meetings, door-to-door canvassing, phone calls, email, social media and other means, to communicate its message and receive feedback from party members and constituents. Reaching out to potential new members can increase party membership, and in turn increase potential sources of human and financial resources. Further, when a party is engaged in an ongoing conversation with its members, it has the opportunity to receive constant feedback about citizen concerns and priorities, which can lead to more informed policies and messaging.

### How Can Technology Help?

New digital and online technologies cannot replace a party's in-person communications, but they can enhance, support and enable them. For example, a party might still hold rallies to facilitate direct voter connection, but it can use radio, social media, email and text messages to invite supporters to attend and to increase chances of a good turnout. Likewise, SMS messaging can help a party loyalist receive "talking points" and other information from the party, which the loyalist can then pass along to other voters in the same community. They can do this in various ways, including using social media accounts (e.g., sharing something on Facebook or retweeting a Twitter message), sending out email blasts to their personal network or forwarding emails from the party, and word of mouth.

That being said, while technology can facilitate a party's interactions with its members and provide a more innovative way to communicate, the groups that benefit from the introduction of technology are often the same ones that were fully engaged previous to its introduction. Women and marginalized groups often face unique barriers to accessing technology and therefore, to target all of their members, parties may need to better understand what those barriers are and work to mitigate them.

There are a few cases in which technology tools can be particularly helpful: in those situations where geographical and cultural norms, and/or security, make traditional outreach difficult; and in efforts to reach young people and/or urban populations. By the same token, tech-based forms of outreach may not reach specific sectors of society due to a range of barriers, including financial, social (both visible and invisible), and infrastructural.

Political communications technologies can help a party perform vital outreach activities. The table below outlines which activities are best served by which tools.

| Activity | Description | Tools |
|---|---|---|

| Activity | Description | Tools |
|---|---|---|
| Mobilizing supporters | Tech tools can be used to announce when and where supporters can meet. A party does not need any personal information to share this information on many platforms and it is a free service to those who have internet access. | • Facebook<br>• Twitter<br>• SMS & SMS apps such as:<br>• WhatsApp<br>• Streaming party events online |
| Gaining new supporters | Utilizing tech tools allows a party to contact only those willing to listen to specific messages on specific media platforms; this saves a party outreach-related time and resources. | • Online advertising<br>• Targeting<br>• Voice over IP (VoIP)<br>• LinkedIn, whose blogging feature can be utilized in myriad ways |
| Learning members' opinions | Technology has made it easier for a party to maintain two-way communication between members and citizens. New tools can create a space for party leaders to discuss issues with citizens and hear real opinions. | • Reddit[2]<br>• The Issues<br>• SMS |
| Training staff and members | Training staff and members can be expensive, especially for party branch offices that have to bring in experts from larger cities. Digital communication tools can help connect party members without travel. For more information on these tools, see our case study about the Podemos Party in Spain. The cloud can also help a party share training material and up-to-date member lists with branch offices, without needing more than one copy. | • VoIP: e.g., Skype or Google Hangouts<br>• Cloud applications |
| Distributing party messages | Communicating a clear, unified message to constituents is often challenging to a party. Tech tools can help the party spread its message consistently and cost effectively. Targeting is an important element of distributing party messaging, to ensure those on the receiving end are interested and do not consider the message spam. | • Party website<br>• Social media<br>• Online advertising<br>• Targeting<br>• Emails |

### Communications from Constituents

Besides distributing messages to party staff and members, a party must manage communications from members and constituents. In countries with widespread internet adoption, citizens can sometimes email their elected officials or contact them via social media, though managing the incoming flow of messages can be challenging.

Tracking information from members and constituents allows a party to identify and track high-priority issues and unmet needs, as well as reactions to legislation, which can improve its message and policy development. While technology does not replace the power of a face-to-face talk with a constituent, it can facilitate communications with many people at once, even in low-tech environments.

# USpeak: SMS Web-Based Constituent Engagement Tool | NDI



**USpeak: SMS Web-Based Constituent Engagement Tool**

In Uganda, NDI has experimented with a phone-focused platform called USpeak to connect voters with their members of Parliament.

USpeak is an SMS and web-based constituent engagement and tracking platform that provides a mechanism for citizens to communicate with their representatives using SMS, and for lawmakers to better recognize citizens' needs and interests.

The USpeak tool allows constituents to share their views and request information on issues from MPs by text message, voicemail or by leaving a message with the NDI managed USpeak call center, which handles 23 of the most widely spoken languages in the country. USpeak then aggregates the reports and requests by issue; this allows MPs to track the information, including the number of contacts and types of issues, and compare them to the number of messages received by other lawmakers on these issues.

In each case, the use of technology is a means-to-an-end, rather than an end in itself: technology is only useful if it helps the party perform its functions and achieve its goals. A party should identify a variety of methods with which it can deliver its message to its target audience, including in person, by telephone (either voice or SMS), through radio, TV, newspapers, internet and social media, and by mail or email. For more information, please see the section on what types of technology can help.

For more information about USpeak, please see the *Citizen Participation and Technology: An NDI Study* [Page 43].

# Policy Development

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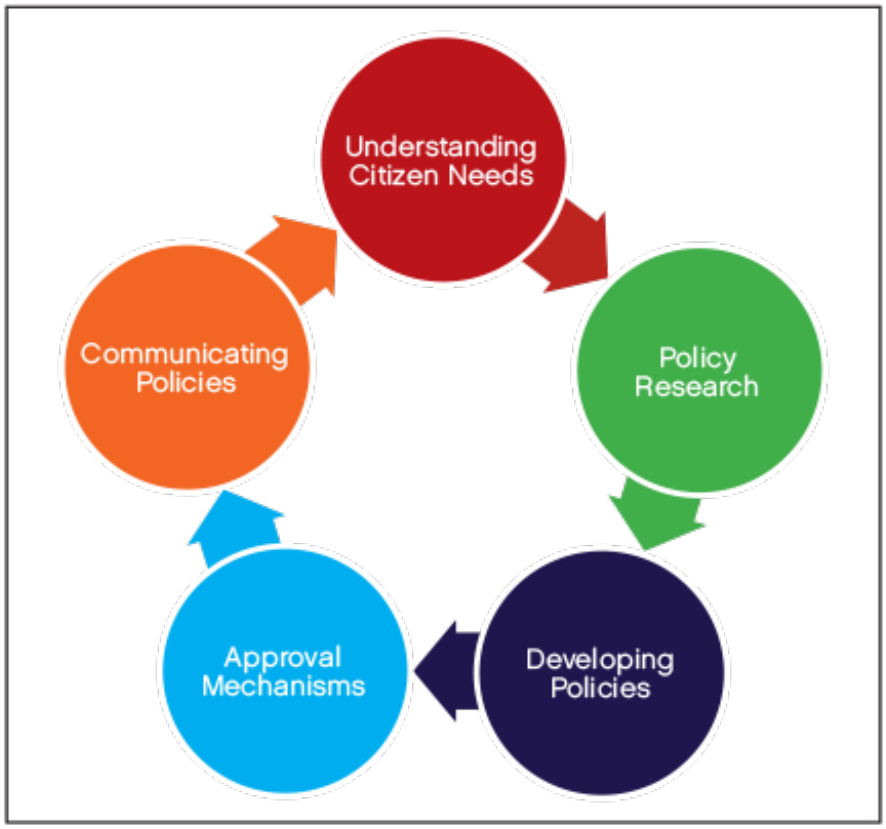
## Stages of policy development[1]

In a democratic government, a political party should propose policies that are representative of its members, then campaign on those policies and implement them when in power. If a party is in opposition, it should critique or present alternatives to the ruling party's policy proposals.[2] Developing viable policies is therefore a key task for any political party, and technology, if used well, can play an important role. The section below describes several components of policy development and outlines the corresponding helpful tools. For more information on policy development, please see *Developing Party Policies,* from NDI's Library of Political Parties and Democracy in Theoretical and Practical Perspective Series.




### Understanding Citizen Needs

Citizens generally support the party whose policies align most closely with their needs and concerns. A party must therefore have effective methods for engaging with citizens in order to understand their needs and prevent disenfranchisement. To ensure that its policies are inclusive, a party might seek the help of outside experts — such as civil society organizations or academics — to better understand international best practices and various populations' points of view. Engaging youth and women's wings for input also helps a party design more inclusive policies, and it should aim to incorporate the opinions of all of the sectors with which it engages, including but not limited to rural populations, poor citizens, people with disabilities, ethnic and religious minorities, and LGBTI communities. Reaching out to different segments and understanding their specific needs requires time and money, but in some cases, a party can use technology tools to increase its effectiveness and lower its outreach costs.

Some examples of how technology tools can be used:

- Community town halls can be costly and time consuming, but with internet connectivity, online community forums with special interests groups might cost less;
- If the literacy rate is high and most of a party's target audience owns mobile phones, SMS polling on applications like WhatsApp can help the party better understand citizen needs; and
- Asking followers' opinions on a party or candidate's social media page can be useful in gauging support for specific issues. On Facebook, for example, there is an application that allows users to post a custom poll for follower/supporter completion.

### Policy Research

Once a party understands its constituents' needs, it should identify the most pressing issues and propose realistic solutions. It is crucial to understand the issues' historical context and possible consequences, and this should involve desk research — collecting reliable information to inform the party's understanding of and response to an issue. Good research should focus on outcomes, such as what the party needs to do and how it can achieve those goals.[3]

Policy research should include:

- Online research, to understand the policy's environment and context;
- Sentiment analysis, to examine the attitudes behind social media comments. Measuring sentiment can provide party officials with an indicator of the party's public image, without requiring them to dig into individual comments. However, sentiment analysis will not reveal the context behind the positive or negative feelings, and should be supplemented with other types of research and outreach;
- Polling of people's perceptions of different topics, making sure to disaggregate by gender, age and other demographic factors. A party can use a database to aggregate and organize responses in order to share them with regional party offices and refer back to them later;
- Interviews, which are vital to in-depth research. Digital communication tools such as Skype and Google Hangouts can save a party time and money by allowing party members to conduct interviews without traveling; and
- Research notes, which a party can store in a glossary such as Google Drive or Microsoft Cloud for easy sharing and updating by party members in different locations. Multiple users can make comments and edits on a single document from any internet-equipped location, as long as they have proper login credentials.

### Developing Policies

Mindful of the findings from policy research, the political context and the environment, party members can then develop robust policies. Given the available resources, a party should determine whether the policy will respond to the problem (according to the community it affects) and whether it will effectively serve all members of that community, including women.

Developing effective policy solutions requires clear issue identification, a solid base of evidence, sound financial skills and innovation. [5] Good communication within a party allows officials to better understand political sentiment in different regions of the country, and to more effectively request feedback and support. Tools that can aid internal party communication include:

### Approval Mechanisms and Member Feedback

There are a few options for approving party policies, including approval by a party congress, the full membership or the executive. An open and inclusive process might keep members engaged. Although party members might not agree with all of the party's positions, the opportunity to change or challenge those positions over time can give them a reason to remain engaged. Member input incorporation mechanisms also allow the party's positions to adapt and change over time. The state of a party's internal democracy also plays an important role; for example, if a party's members elect its leaders, policy approval also tends to be more democratic. In the long run, building a strong party externally is easier if a party has strong internal democratic processes.

Having a *party congress* is the most common approval mechanism; it provides party members with the opportunity to debate policy platforms. A party congress can also be a forum for officials and activists at different levels and from different structures to exchange ideas and experiences.[6] It is possible to combine party congresses with other forms of discussion, such as an online forum where delegates can discuss policies and vote virtually from various regions. This could save a party traveling costs, but the party must consider all of the pros and cons with electronic voting — for instance, security and privacy issues. For examples of online voting, see the case studies on Italy's Five Star Movement, Net Parties, Denmark's Liberal Alliance's use of Blockchain secure online voting and the European Green Party.

Another approval mechanism — the *full membership vote* — has become more popular as rising internet penetration has lowered logistics costs. While highly inclusive, involving all members in policy approval remains a logistical challenge. However, some parties have begun using this method.

- Argentina's Net Party uses source software called DemocracyOS. This software allows citizens (not just party members) to vote on existing legislative projects in order to determine how the party's representatives will vote, and allows citizens to suggest new policies for the party's representatives to propose.
- The German Pirate Party has PiratePads, which allow members to collaborate on policy documents and discuss them via online chat.
- Podemos in Spain used TitanPad, a collaborative document application that allows members to write, share notes, and discuss policy proposals.

The least inclusive approval mechanism is approval by the *party executive*. Although this approval process does ensure that party leadership can focus on the policies they consider the most strategic, it also permits potential leadership abuse, as well as disconnect between leaders and members.[7] However, this approval mechanism can work well, provided the party has installed mechanisms that guarantee communication and consultation between party leadership and membership, and provided the party factors communication and consultations into the approval process. Tools that help party leadership consult with members include:

- The interactive use of social media or the party website. The party can ask members to share their opinions about specific topics and issues online; and
- The use of a video engagement tool such as DemTools' The Issues. The Issues and similar tools allow party leaders to discuss key issues with members and give members the opportunity to pose questions directly to the leadership.

### Communicating Policies

Once a party has approved a policy, whether by congress, member vote, or executive decision, it has to communicate that policy to party members, constituents and voters. Having a well-researched policy agenda with realistic outcomes during the campaign season can strengthen a candidate's overall message.[8] Technology tools can be a great asset to a party during this outreach and communication stage. However, as the outreach section of this paper states, technology does not replace traditional forms of messaging, though it can amplify them. Among other things, broadcasted debates are an important tool through which a party communicates to constituents that it has a solid policy agenda, a clear and specific map for implementation, and plans for realistic outcomes. Whether via radio, television, online or multiple mediums, the more people who hear a candidate discuss his or her policies and the party's plan for implementation, the better.

Communicating policies is equally important outside of campaign season, because it can mobilize stakeholders, change attitudes, and allow relevant government departments to prepare a response.[9] Outreach should be multi-pronged to ensure that the greatest number of people are hearing, understanding and responding to the party's message. Additionally, for outreach to be truly inclusive and reach as many citizens as possible, the tools and methods with which it is conducted should take into account different languages spoken and different levels of access to media. For more information on message targeting, see the audience section of this paper.

Tools that can improve the efficacy of a party's outreach efforts include:

- Email blasts, which update supporters on party policies, and permit a party to track and test interest in and response rates to different policy issues;
- Social media, which makes it easy for supporters to share party information and updates with their personal networks;
- SMS blasts, which spread the party's message to areas with less internet penetration; and
- Traditional forms of communication, such as radio, community meetings, and door-to-door interactions, to communicate the party's message to as many people as possible.

[2] National Democratic Institute, Political Party Programming Guide (Washington, D.C.: National Democratic Institute, 2014), 2 (p. 2).

[3] Campaign Skills Handbook, Module 5.

[4] Developed as part of a regional skills-building initiative in the Middle East and North Africa region.

[5] Ibid.

[6] National Democratic Institute, Political Parties and Democracy in Theoretical and Practical Perspectives: Developing Party Policies (Washington, D.C.: National Democratic Institute, 2013), 37-38(p. 37-38).

[7] Ibid (p. 38, Table 2).

[8] Campaign Skills Handbook, Module 5(p. 25).

[9] Ibid (p. 25).

# Management | NDI

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**Management**

A party is a unique organization. Its primary goals are representing citizens in elections and advocating for policy positions — in government or in opposition— that it believes further citizen interests. Unlike many other types of organizations, a party is typically staffed by a mix of party members and full-time professional staff. Every political party must have an internal organization system, including procedures for making decisions, managing resources, tracking members and activists, and communicating internally. Digital technologies have revolutionized the way businesses, governments and organizations across the globe manage their internal processes, and can be equally useful for a political party. The following section lists some of the core elements of political party management and some potentially helpful tools.

**Internal communications:** Internal communications are a critical component of party management. Most parties have provincial and branch offices, and information should constantly flow between these and party headquarters. Branch offices might need to share financial data, information on local policy priorities based on day-to-day interactions with members and citizens, information on member activities, and local news developments. Similarly, a party's national headquarters might need to keep its branch offices informed of newly developed policy positions, messaging priorities, major party events, and changes or updates to party rules or priorities. The worksheet on internal communications channels describes some tools a party can use to streamline its communications processes.

**Financial management and compliance:** Financial management is critical to any large organization. A party must track its income and expenses to ensure that it does not spend more money than it takes in. It must also constantly monitor its expenses to make sure it does not waste money or, worse, lose resources to fraud or theft. Office applications — truly simple digital tools — can immediately improve an organization's ability to manage its finances. Spreadsheet applications like Excel (or Google Sheets) and basic accounting applications like Quickbooks can help a party plan and manage expenses and income consistently and effectively.

In many countries, all political parties must adhere to strict requirements for tracking and reporting on income and expenditures in order to enforce party and campaign finance laws. In some developed democracies with extensive technology infrastructures, there are off-the-shelf applications available to help manage compliance. However, in most cases, a party would have to develop custom software, or adapt existing software, to meet its specific needs. Customized products can be both desirable and costly. For more information, see the worksheet on customized vs. off-the-shelf applications.

**Decision making:** Parties' decision-making mechanisms can vary. For example, a party might select its candidates by primary, official policy platforms may be determined by a vote at a convention and other decisions might be made by an executive committee. Particularly in the case of decisions that require as many party members' input as possible, technology offers vast possibilities. The case studies on Denmark's Liberal Alliance and Italy's Five Star Movement demonstrate how some political parties have used online voting to elicit increased participation from their members.

**Member management:** Members are critical to political party operations. Some parties are staffed almost exclusively by party members volunteering their time, while others rely heavily on financial contributions from members. To manage members effectively, a party should develop a system for keeping track of interactions with members and constituents. A simple spreadsheet that tracks key constituent data and notes recent interactions between constituents and the party suffices. Other database applications, such as Microsoft Access, are also useful. However, these applications are not tailored to political parties, so searching for and tracking as much data as a party might want to maintain can be difficult, and the applications can be cumbersome and time consuming to update.


Increasingly, parties are turning to Constituent Relationship Management (CRM) applications designed specifically for political parties and campaigns. CRM software helps a party keep track of its members and supporters, and party officials' interactions with them. CRM systems can be expensive, and typically require significant upkeep costs. However, there are free, open source options available. NDI's ICT Team recently developed CiviParty, an open-source CRM database adapted from the CiviCRM platform. However, even free applications can have significant hidden costs. For more information on the relative benefits of open source applications, see the worksheets on proprietary vs. open source technologies and cost.

Additionally, cloud-based CRM applications have unique benefits, including their ability to allow multiple users to track updates simultaneously, and capacity to automatically record all changes and updates, including those made by members. However the user must have access to the internet to utilize these benefits, which can be restricting.

**Knowledge management:** Knowledge management is a challenge for many organizations. Documents can easily disappear if stored on a single computer's hard drive, for instance, and many organizations struggle to keep track of reports, assessments, plans and other important documents.

Many companies and large organizations have turned to custom (and often expensive) document-management and tracking systems like Sharepoint, but a party should also consider free/open source alternatives like wikis. Wikis are designed to be simple tools for organizing and updating information, often hierarchically, and they contain pages and subpages on particular topics. Wiki pages typically include images, videos, uploaded documents and other resources, making them potentially powerful tools allowing a party to keep track of everything from field outreach checklists to poll results, and including the policy documents that underlie the party's political platforms.

Wikis are also typically designed to allow many users to create and edit pages at once. This means party staff can use wikis as a platform for collaboration. In some cases, a local network or intranet hosts wikis, but often they are cloud applications and require internet access. Of course, wikis are just one solution to the problem of organizing information, and like every other online tool, they are only as secure as their login information.

**Digital training:** Training is a key political party task. Staff and members require regular education to keep them on-message and up-to-date on the party's organizing strategy and tactics. Face-to-face training remains superior to online training in most circumstances. However, new technology can supplement traditional training programs. For example, a party can use digital channels to distribute follow-up information and updated materials. Email, listservs and social media allow participants to ask questions and receive clarification, and to network with one another after the face-to-face portion is complete. Webinars, or webcasts, are another way for parties to reach out; they are peer-level web meetings that allow users to share text-based messages, as well as voice and video chat simultaneously across geographically dispersed locations.

Digital channels can also deliver the actual training classes, even in relatively low-tech environments. Many political organizations in the United States – including both the 2008 and 2012 Barack Obama presidential campaigns – have employed online video to create "virtual classrooms" for field staff and volunteers, establishing an online curriculum for volunteers to study on their own time. For example, political parties such as the European Greens, and political organizations like Wellstone Action and the New Organizing Institute, host a large range of training resources and modules online that are available to their supporters and the general public.


If possible, it can also be useful to have trainings available in multiple formats, to allow those with different bandwidths and levels of internet access to participate. Possible formats include video presentations, PowerPoint or slide presentations, basic HTML webpages, or downloadable document such as PDFs.

A party can use digital means to train its staff and members in cases where travel is impossible or too expensive, security is a concern, or other reasons. Digital communication and collaboration tools, as well as e-learning software, can allow party members to interact in real time or asynchronously. These tools can improve collaboration among party members, simplify intra-party resource sharing and help maintain a standard level of training. Although technological capabilities vary from party to party, all parties can take advantage of at least some aspects of digital training.

Digital communication and collaboration tools allow new staff and members to interact with experienced party staff via the web in real time. These tools can help parties communicate with branch offices and run live trainings that allow participants to ask questions and get feedback. Additionally, through community e-learning software, new staff members can take online training courses on their own time without the help of an experienced party staffer.

Several good examples of communication and e-learning tools exist.

- Video conferencing/VOIP tools (e.g., Skype, Google Hangout, GoToMeeting): New staff and members can live chat with training staff, with or without video.
- Co-browsing or screencasting (e.g., Oracle): Co-browsing lets experienced party staff perform virtual demonstrations for new staff and members.
- Virtual learning environments (e.g., Blackboard, Moodle): A party can upload training resources to online learning environments that allow for interaction with instructors as well as member collaboration. Some, such as Moodle, are free and open source, while others, like Blackboard, are available for purchase.
- Massive Open Online Courses, or MOOCs (e.g., edX, HarvardX, MITx): Many leading universities are offering free educational content to anyone with an internet connection, through MOOCs. Early data on MOOCs suggests that significant work needs to be done to diversify the learning audience and make online education as engaging and interactive as the traditional classroom. Partnerships between academic institutions and NGOs offer one potential model. A recent Harvard/MIT study of nearly 70 such courses found a rising share of female, U.S.-based, and older participants. Courses such as these could help party staff increase their skills in basic organizing, fundraising, management and other useful activities not specific to political parties.
- Webinars/Webcasts (e.g., GoToWebinar): A party can schedule and live stream online training seminars that allow viewers to watch a presentation and interact with the presenter.
- Wikis or Blogs: Wikis and blogs allow new party staff and members to read and modify training materials. These platforms allow for collaborative modification, but no synchronous interaction.

The rise of VOIP tools such as Skype and Google Hangouts have created new opportunities for live online video trainings. They combine several of the advantages of online video and in-person trainings by allowing participants to join from any location with an internet connection (preferably with a minimum download speed of 512Kbps and a minimum upload speed of 128Kbps). But, again, in low-tech environments, video chat applications might not be available consistently or at all.

# Core Concepts | NDI

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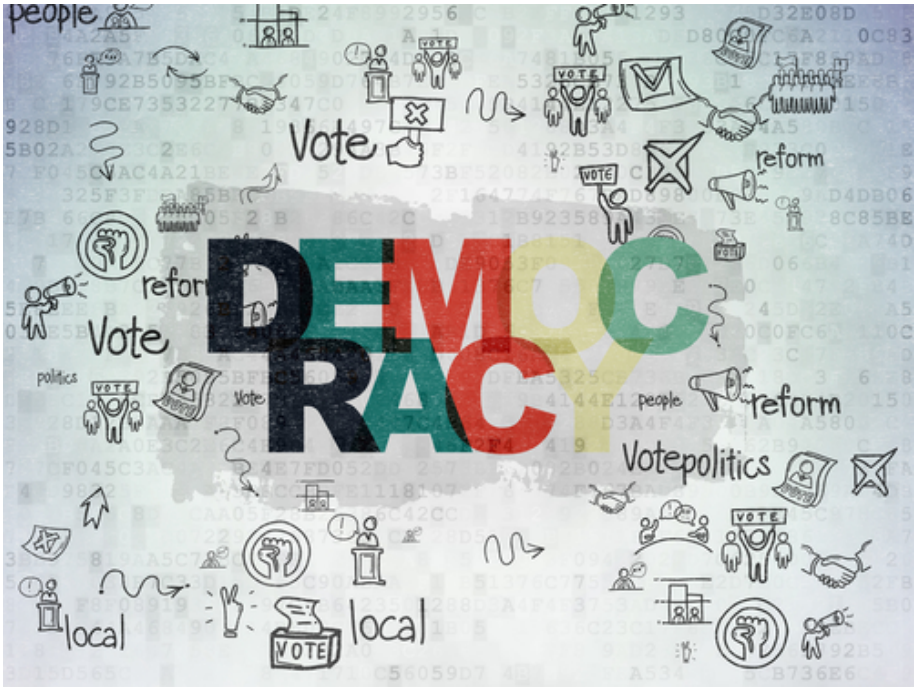
**Core Concepts**

## Database

A well-structured and comprehensive database provides the foundation for a candidate or party's efforts to communicate with and track voters. All other, more sophisticated technology stems from the database and is virtually ineffective without the information in the member database. This tool allows a party to keep track of its members and the party's interactions with them. For example, a party could use its member database to determine whether a person has volunteered their time, contributed money or attended party conventions in the past. Those who have contributed or volunteered in the past are most likely to contribute or volunteer in the future, and as a result, donor and member lists are important assets; building them into the party database makes them more usable.

However, without effective data collection, databases are not particularly helpful. Faulty or incomplete data collection may lead a political party to draw erroneous conclusions, or could leave important gaps, limiting a party's ability to act on the gathered information. Good data collection will help a party draw a comprehensive picture of voters that can
shape all aspects of party-constituent interaction.




If the the information goes beyond demographics and finance, it can also be used to target party resources in an efficient manner. For example, if a party collects information on how constituents consume information (e.g., on social media, via radio, by reading the newspaper) and tracks trends in consumption based on age and location, it can target its message to specific demographics. Instead of paying for outreach on all media outlets, for instance, the party can send a targeted message via one media platform to young people in a specific region, and another targeted message to rural middle aged women via a different media platform.

Member databases are generally used for tracking interactions with party members, while voter files are used to track the electorate at large and help the party better use its limited resources. However, practically speaking, there is little reason to keep separate databases of members and voters. In fact, in most cases it may be more convenient and efficient to maintain all of the data in a single database. A party's goal is to recruit as many voters as possible to the party: any voter is a potential party member. A single database makes it easier to shift a voter's status from potential party member to actual member. For example, the most likely people to become party members are the family of existing members, and an integrated database of members and voters allows the party to systematically identify family members of those who already support the party.

Similarly, there is little technical reason to maintain separate databases of voters and financial supporters; however, there may be organizational or legal requirements that dictate the two be kept separate. For example, in the United States, political parties maintain separate databases of financial contributors in order to comply with legal transparency and reporting requirements. If there is no such legal prohibition, it is more efficient to maintain a single database.

# Database Options in Low-Tech Environments | NDI

tech4parties.org/129-2/database-options-in-low-tech-environments/

**Database Options in Low-Tech Environments**

The database is a political party's single most important tool. Although technology provides ever more sophisticated options for prioritizing which constituents a party interacts with and when, even a party in a low-tech environment needs to decide whom to engage and when. When a party is faced with these types of technology challenges, member training becomes even more important, as mistakes can take longer to catch. For instance, a party might use printed lists that cannot be updated regularly, so several activists may have to input data onto the same hard copy document before they can update a central database.

**Card Files:** The first voter files were index cards. Each card contained the voter's name, gender and contact information, and a record of each contact. Candidates or activists could sort the cards by address and consult the card before knocking on a voter's door. They recorded the conversation on the card and followed up appropriately by phone or mail. Although it was time consuming and awkward, it was effective in small areas. While card files may be cumbersome and difficult to sort into phone or mail lists, they are manageable if there are responsible, well-trained members to organize them. These files can be useful for direct voter contact and for smaller parties, or at the branch office level. For an explanation and a checklist of a basic voter file's requirements, please see this worksheet.

**Spreadsheets:** Spreadsheets are easily available and can be effective for a single precinct or a small geographic area. Each important field in a spreadsheet should be a separate column; fields might include first name, last name, address, phone, party or candidate preference, gender, and results from contact attempt(s). Activists can then sort the data by address so that they know who they will be talking to, and party officials can sort the spreadsheets by contact attempts in order to conduct appropriate follow up. More specifically, a party could re-attempt to contact constituents who were not home or follow up with members who promised to make a contribution. The ability to sort and count quickly makes spreadsheets a powerful tool, but they require active management.

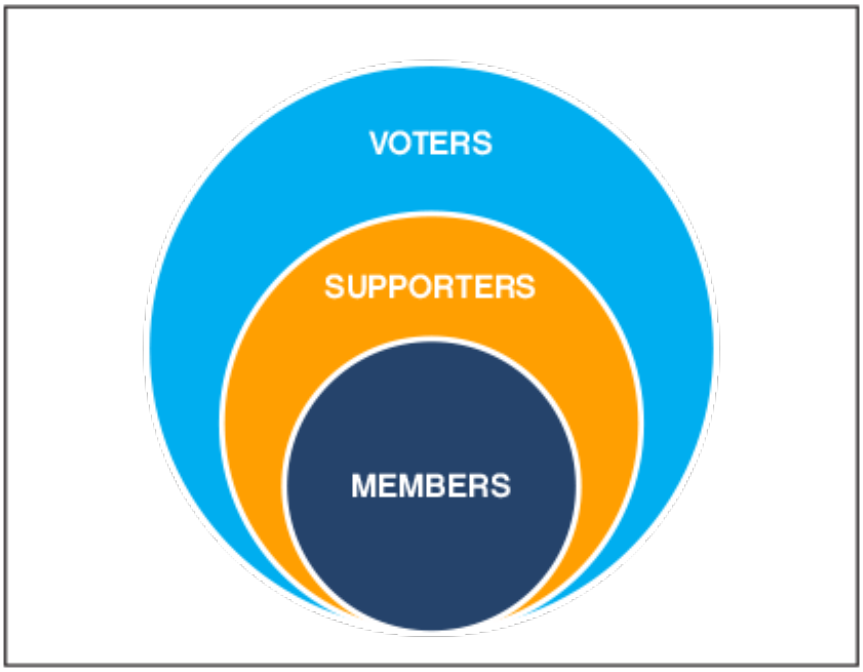
**Database options in low-tech environments:** The database is a political party's single most important tool. In a low-tech environment, a party might use printed voter lists, card files or spreadsheets instead of an online membership database.

**Database**: A single database of party members and voters allows a party to keep track of its members and recruit new ones. Using its database, a party can record previous interactions with members in order to target those who have previously volunteered or donated.

# Audiences | NDI



**Audiences**




When a party has a message to deliver, it must have various strategies to ensure that the message reaches its intended audience clearly and concisely. The audience is whoever receives party messages, whether through direct messaging or via the news, social media, or other indirect methods.

### Party Members

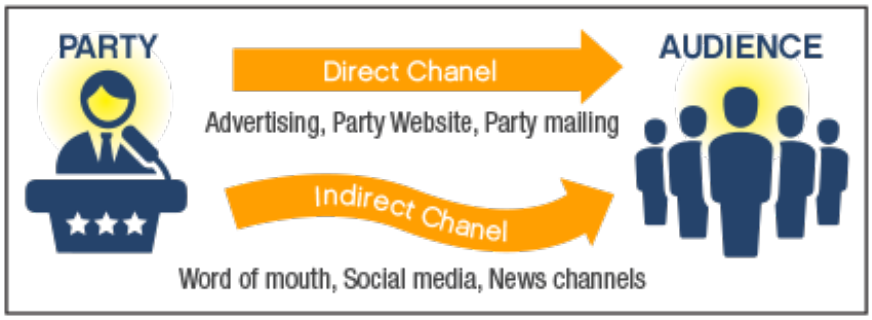
Party members are most likely to agree with the party's message. As a result, a party should use its members as heralds, supplying most of their information and tailoring it in a way that is concise, easy to remember, and easy to pass along. In particular, the party should supply its members with a range of messages about party policy, so that they have a clear understanding of the party's platforms and priorities. Providing this range of information can allow parties to target certain issues that may resonate with specific populations, such as women or youth. Among other things, tech tools can help members spread the party's message to their personal networks, and can help members compile and share information. For example, if a party posts a message on Facebook that resonates with a member, it will be easy for that member to share the post with his or her Facebook community. Additionally, the party can email members and ask them to post something specific to their Facebook or other social media page about an issue the party is promoting. However, the party message should remain consistent on all mediums, so that supporters don't have to search through multiple platforms to find what they are looking for.

### Party Supporters

Supporters are likely voters who have not committed to spreading the party's message or participating in member activities. It is important to make all information available on the party's website so that supporters and interested voters can research its platforms there, but the party might also send them messages. However, instead of bombarding them with all of the party's messages, it is important to closely target what supporters receive, making sure that the messages align with their interests. For example, if a supporter is passionate about the environment, the party should send him or her messages about its environmental platform. In contrast, sending that supporter messages about small business reform, unless he or she has shown interest in that topic, would be unhelpful and unnecessary. Too much information can overwhelm and discourage party members.

Messages to supporters can only be effectively targeted when information about them has been collected and maintained, including age, address, gender, policy preferences, and interests, in order to understand their priorities. Without this information, targeting is impossible and the messaging will suffer. This is another area where technology, such as sophisticated CRM software, can help a party where and when appropriate.

### Voters




Finally, a party must consider the voting population in general, including undecided, wavering or floating voters. It is best for a party to address the general population consistently, ensuring that all levels and branches of the party say the same thing. Most voters receive information about the party from indirect channels like national news sources or social media platforms. The party must therefore have an outreach strategy to better control its message as it filters through these mediums. This strategy can help ensure that voters hear the same clear, concise, substantive message through an indirect channel as they do through a direct channel. Strategies include press conferences, press releases, leadership interviews, and official talking points, among others.

**Audiences:** A party should have specific strategies for communicating its message clearly and concisely to voters, supporters and members.

**Members:**

- act as party heralds and are more likely to get party info directly;
- the party should package the party message making it easy for them to share.

**Supporters:**

- receive party information from both direct & indirect channels;
- they should receive targeted messaging, so the party needs to know their interests.

**Other Voters:**

- receive most information is through indirect channels, so the party message must be consistent;
- the party must identify and use the information channels that the intended audiences use.

# Security | NDI

tech4parties.org/129-2/security/

**Security**

## Tech Security and Political Parties


Every organization that uses computers and cell phones needs to think about security, but this is particularly important for political parties. A party maintains a large volume of information, such as personal data about party members, that is potentially valuable to political rivals, hackers and possibly the government. Many parties operate in dangerous political environments in which their opponents, or even government actors, will not shy away from tactics like hacking or theft. In the most dangerous political settings, poor security could expose party staff or members to some sort of government retribution or physical harm.

To protect themselves and their resources, parties should consider security in all aspects of their technical operations, from the individual staff and member level to party-wide networks and software. There are three levels of tech security: individual, organizational and application. This section describes all three in more detail.

## Individual-Level Security

Security begins with individual party members and staff. Many corporations and government agencies have had vital computer networks compromised because a single staffer clicked on the wrong email attachment or gave a vital password to someone who called on the phone posing as a technician. Training and the organization-wide enforcement of good security procedures can help a party avoid these potential security problems.

Any staff or party member who uses party computers or accesses party systems through cloud-based applications like those of Google Drive should receive basic security instructions. They should know to:

- Never reveal passwords to anyone not authorized to have them.
- Never allow access to software or computers to people not authorized to use them.
- Never disclose security practices to people outside the party or those unauthorized to know about them.
- Always change passwords regularly, particularly when a piece of software prompts them to do so.
- Never use simple passwords such as “password” or “12345”; these are a frequent source of security compromises.
- Update computer operating systems, antivirus software and other types of software when the system prompts updates, remaining wary of suspicious and potentially malicious update prompts that might be phishing attempts.
- Beware people calling the party office and asking for a password, even if they claim to be tech support staff.
- Beware of clicking on links or opening attachments in emails unless the destination or file is known to be safe. Note: .exe files arriving by email are particularly dangerous because they are pieces of software ready to run when clicked.
- Log off from accounts when an application is not in use, including specific software applications and computer user accounts. Depending on computer operating systems and network requirements, staff might need to turn computers off when not in use.
- Maintain the physical security of party offices. In short, lock the doors. Not only can political rivals steal computers to gain access to party data, but thieves can take valuable digital devices as well.

These basic security practices apply to contractors, subcontractors and consultants, as well as party staff and members.

## Organization-Level Security

Individual-level security is the first step, but a party must also consider organization-wide practices.

- Party staff, members, consultants and contractors should only have access to the computers and software required for their roles in the party. When possible, each person should have unique software logins, accounts or profiles; multi-user username/password combinations are vulnerable to abuse.
- Many software packages have varying access levels depending on the user's role, and a user should only have access to *necessary* levels. For example, a grassroots member-management system might allow some people to view member information without allowing them to alter or update that data. Higher-level accounts might allow data entry or alteration, and administrator-level accounts might allow the account-holder to change the software's basic settings.
- Disgruntled former employees are a frequent source of security problems. A party should change passwords and delete user accounts when people leave the office or party. This practice applies to every computer or software application the person used.
- A party should screen new employees and vendors carefully to ensure they have no history of undesirable behavior that could harm the party.
- To the greatest extent possible, a party should secure its offices and other physical locations against theft or spying.
- Likewise, a party should train its staff to be particularly careful with party-owned computers; a stolen laptop or tablet might give access to important networks, documents or data.
- A party should implement organization-wide requirements for computer users to change passwords at regular intervals.
- If a party is working with a tech vendor that is also working with other political parties or organizations, the party should determine whether the vendor has internal procedures to prevent the improper passing of information from one team to another.
- Cloud applications are, by their nature, accessible from anywhere in the world. A party should take particular care to train its staff and/or members in username/password security for any cloud software (such as Google Docs) that the party uses.
- When possible, a party should put a dedicated internal technology team in charge of its computers and software. If staff are not available, a consulting firm can substitute. But technology security should be someone's defined job – it cannot be an organization-wide afterthought.

### Application-Level Security

Finally, a party must consider security at the network and application level. The intricacies of application-level security might be beyond most party staff's capabilities, but the party's technology team and/or technology vendor(s) should understand its vital importance.


- Technology staff and vendors must be aware of the security risks or considerations of any technology they recommend, create or install for a party. They must make party decision makers aware of any potential problems and present a plan to circumvent those problems.
- A tech team must secure individual computers, both physical and remote, or cloud computer networks against unauthorized intrusions. Technology staff should monitor and update "firewalls" and other digital security barriers.
- Technology staff should set up the correct levels of application access for staff, members and others when they configure software applications. Users should only be able to utilize the features and view the information that their roles demand; these roles and the accompanying levels of access require careful planning.
- Tech staff must take particular care with administration-level accounts and the accompanying usernames and passwords. Once staff installs and configures an application, they should change these passwords in order to prevent vendor staff (or others) from inappropriately tampering with the software in the future.
- Data backup should be a part of the security process. Technology staff should store information on an archived network in case the network is compromised and the data corrupted. The data archive itself must be securely protected.
- A party and its vendor should establish a regular process to ensure that organization-wide software applications remain up to date, with the

latest software “patches” regularly applied and upgrades installed. This consideration applies both to proprietary and open-source software, as well as to any custom applications the vendor has created to meet the party’s specific needs.

- If a user can remotely update or access software via application programming interfaces (APIs) or other data gateways, the software’s vendor must ensure that these are protected against unauthorized access.

If a party truly fears that its data, networks or computers have been compromised, it should consider bringing in a specialized security firm. The party might also consider preemptively hiring a security firm to audit the party’s technology for security considerations. This process can include the use of “white hat” hackers – skilled tech staff who attempt to break into systems in order to identify potential security risks. Of course, the party should conduct a thorough background check on security specialists and other technology vendors.

### Personal Security

Even if it is only to support a political group, joining an internet community such as Facebook or Twitter opens a person up to feedback, both positive and negative. This is particularly true for women, who can become the target of online attacks that range from name-calling to direct threats of violence. Female party members and supporters who join online communities should think through the following questions:

- What are the gender-specific issues with this online platform with regard to privacy, safety and security?
- Would using this technology put me, as a woman, in particular danger?
- Are there ways to mitigate personal risk?

# APIs | NDI

tech4parties.org/129-2/apis/

**APIs**

APIs (Application Programming Interfaces) are built into many software and cloud applications, where they set the specifications that outside programs can use to interact with the application. For example, a supporter-data-management/CRM system could have an API that allows a mobile app to upload information to the database directly from a phone; this is a popular grassroots canvassing tool in the U.S. APIs simply allow one program to access or alter data in another, as long as it follows the API's specifications and has the necessary login information or other credentials.

The API question is important for any data management system. Voter data systems frequently use APIs to allow other programs to input or export information in the form of spreadsheets and databases, and APIs are built into most Constituent Relations Management (CRM) tools currently on the market. Although they can extend a particular system's capabilities and allow disparate systems to collaborate, they raise obvious security questions because they can allow access to vital and often confidential data. If a party is considering a system that employs APIs – particularly in a negative security environment – it should pay close attention to how those connections are secured and how an opponent could use them to steal or sabotage information. Asking the software vendor about security and APIs is a good first step.

**Security:** Every party maintains a high volume of sensitive, personal information. To be secure, a party must implement security policies for individual staff members, the organization as a whole, and its network and applications. Trained staff and members, restricted levels of access, reliable vendors, and an in-house tech staff can all contribute to tighter tech security.

**APIs**: APIs, or Application Programming Interfaces, can extend a system's capabilities by allowing outside programs to interact with a database. However, technology teams must make sure the API connection is secure, because APIs can lead to unauthorized access.

# Preliminary Analysis for Technology

tech4parties.org/preliminary-analysis-for-technology/


A party is a competitive organization. It competes with other parties in elections to gain a greater share of power; in the legislature to turn its policy priorities into law; and in the collective pool of voters to woo potential members and fundraisers. In this environment, a political party is constantly trying to gain a competitive advantage. Before thinking about specific tech tools, a party should take into consideration how different party members access and use technology (disaggregated by age, gender, location, etc.) to ensure the tools can reach their intended audience.

In the current Information Communication Technology (ICT) environment, there are a number of valuable new tools that can do just that. They can help a party organize, communicate and engage with members and voters. However, it can be tempting to look at modern technological tools as simple, low-cost solutions to a broad range of problems when, in fact, many are neither easy nor cheap. Even simple, “free” ICT tools require substantial staff time to establish and maintain, and they often have significant hidden costs. This worksheet can help a party better understand what short- and long-term costs are involved in a tech-based project, considering acquisition, setup and ongoing expenditures.

Political parties often focus their attention on the newest, most visible tools or those that receive the most media attention. However, tool selection should be the last in a series of steps that include investigating party needs and goals; examining whether ICTs can help meet those goals; and determining which types of ICTs are appropriate for the environment and audience, with a particular focus on the time and financial commitment that may be required. These steps can be broken out into four broad questions:

This section will help guide a party as it answers these questions, and provides links to resources on this site and elsewhere on the web that contain additional information.

# What Problem are We Trying to Solve?



Gaining a clear idea of the problem at hand is critical: ICTs provide tools to solve *specific* problems. Clearly defining the problem will help a political party select appropriate technologies and provide a basis for the goal-setting process to come. One common technique for identifying organizational problems is a strengths, opportunities, weaknesses and threats (SWOT) analysis. There are different ways to conduct a SWOT analysis and there are many public domain resources that outline how to do so, including:


Identifying the problem to be solved not only addresses weaknesses; it can also prompt capitalization on strengths or investment in new opportunities. For instance, a party with strong outreach capabilities may identify an underserved segment of the population; it may subsequently seek to develop policies addressing the group's concerns to develop support among its members. In this case, the problem might be that no political party adequately represents segment "x" of the population. In this example, the party neither addresses nor rectifies a weakness in its practices or capabilities, but rather takes advantage of an opportunity to harness its strengths and capitalize on a newly identified opportunity.

After a thorough SWOT analysis, a party should have a list of potential problems to be solved. Only specific problems are useful. For example, "We do not communicate well enough with our members" is not a specific problem. Member communication is complex and involves the management of contacts, messaging and message dissemination. However, a party that is struggling with member communications might determine that it can improve by consolidating its member lists into a single database, rather than a series of individual files held at branch offices. This would allow the party to centralize its communications to ensure that its entire membership receives the same message and that it has standardized practices for gathering and tracking feedback. In this case, the problem the party is looking to solve might be, "We communicate inconsistently with members because our contact lists are decentralized and not maintained in a standardized format."

Ideally, this assessment should be part of a broader strategic planning process, where party staff and activists come together to carve out a vision for the party's future. More information on strategic planning can be found in the International Institute for Democracy and Electoral Assistance (IDEA) Manual on Strategic Planning for Political Parties. Of course, parties may not always have months to commit to an extensive strategic planning process. However, if it is not part of a broader organizational assessment, the results of the SWOT analysis should feed directly into the goal-setting and planning process. Solving the problems identified through the SWOT analysis should remain at the center of the technology strategy. As they proceed through the process, political parties should always be asking, how does this contribute to solving our initial problem?

Broadly speaking, party activities are divided into three areas: outreach, policy development and management. The segment below briefly summarizes each. Although these categories do overlap — for instance, member outreach might feed into the policy development process — these categories help a party develop targeted questions to address during its SWOT analysis. The questions are not intended to be exhaustive, but should help a party develop its own set of questions. The how tech can help page discusses outreach, policy development and management in more detail, as well as the types of ICTs that help a party improve its operations in each area.

**Outreach:** A party constantly communicates with members, supporters, voters and constituents. At election time, it broadcasts campaign messages via mass and social media, at events, and during door-to-door canvasses. At other times, it recruits new members, communicates policy positions and/or legislative successes to members, supporters and potential donors, and updates members on important party news. But a party should conduct all of this outreach with feedback in mind. Outreach must be a two-way street; a party should have its finger on the pulse of what matters to citizens and supporters, in order to act on their preferences. Feedback mechanisms allow a party to keep abreast of citizen concerns and to better understand:

- To what extent is the electorate aware of the party?
- To what extent is the electorate aware of the party's proposed policies?
- How are citizen preferences communicated within the party?
- Does the party act on citizen feedback? If so, how?
- Who within the population is not being reached or is unable to give feedback (e.g., women, youth or racial minorities)?

For more information, see the outreach section in how tech can help.

**Policy Development:** A political party competes with others for office based on its policy positions and then competes to implement those policies once in office. Once it has identified voters' key concerns and problems, it must use its expertise to develop policies addressing those concerns and problems. The party must consider:

- What mechanisms it uses to determine member/citizen policy concerns;
- How to better incorporate member or citizen feedback in identifying which policy areas to address;
- How to better incorporate member feedback in the process of developing the policy itself and mechanisms for best gathering that feedback;
- Whether all members have an equal chance to contribute to the feedback process or whether members from certain regions are over- or underrepresented;
- Whether the process equitably represents marginalized populations, including women, people with disabilities, ethnic and religious minorities, LGBTI communities, and youth;
- Who develops policy proposals;
- If civil society groups, academics or other topical experts should be consulted;
- Who makes the final decision to adopt a policy position and the process that person or group goes through; and
- Will the policies benefit all members equally (e.g., women, youth, ethnic minorities, or urban/rural populations)? If not, how can that be changed?

For more information, see the policy development section in how tech can help.

**Administration:** A party must have strong management and should clearly structure its internal administration. Components might include the management of paid staff and members; accounting and financial compliance; fundraising; decision-making processes; knowledge management; and training and communication with party staff, activists and members. Targeted questions a party can ask about administration during a SWOT analysis include:

- Who is responsible for managing the party's day-to-day activities?
- What is the role of the party's branch offices? Who manages them and to what extent does information flow freely between the national office and the regional ones?
- Who administers the party's finances? Is the party in full compliance with all national and regional rules? Are expenses tracked to prevent waste or fraud, and if so by whom?
- Does the party provide training to encourage and develop promising talent within the party structure?
- Are women included in the party management structure? If yes, how? If not, why not? How can the party provide more support to allow women to be a part of the management structure?

For more information, please see the management section in How Tech Can Help.

Technology tools help solve specific problems, so a party must clearly define a problem before selecting tools. Performing a SWOT analysis is a good way to identify specific problems. In turn, a party can incorporate those problems into a strategic planning process to set and plan the accomplishment of party goals. To develop targeted questions to address during its SWOT analysis, a party should consider the three main areas of party activities: outreach, policy development and management.

# What Are Our Goals? | NDI



**What Are Our Goals?**

Goals typically address weaknesses, with the aim of eliminating strategic disadvantages, building on strengths to develop strategic advantages, utilizing new opportunities and/or minimizing perceived threats. For example, an established political party that performs well among older voters but not as well with youth might target its recruitment to voters under 40 years of age. It might also seek to build more loyalty with older citizens by involving them in party life through newsletters or by developing mechanisms to consult them in party decisions.


Goals should flow from the problems identified during the SWOT analysis. To use the two sample problems discussed above:

- "The party communicates inconsistently with members because contact lists are decentralized and not maintained in a standardized format" might translate to a goal of "centralize contact lists and standardize communications with members"; and
- "No political party adequately represents segment 'x' of the population" might translate to a goal of "consult with segment 'x' on their needs and priorities, develop policies that address that segment's concerns, and communicate them to that segment."

Goals are important for any new ICT project because they:

- Focus attention on the problem the party is trying to solve, rather than the technology itself;
- Provide benchmarks for assessing the ICT intervention's efficacy; and
- Help eliminate scope creep.

For example, if a party's goal is to increase its support among young voters, and it hopes to use social media to do that, then it can research which social media sites young voters are using. After a given period, it can assess whether young voters have responded to efforts using the selected medium and whether that has translated into more votes or an increase in young members. Finally, maintaining the goal of targeting young people prevents the party from tackling tangential projects, such as creating an additional social media group for pensioners or social workers.

Technology can help a party identify who is not being reached, and consequently help the party strengthen its outreach to those groups. For example, if opinions coming in on a party's Facebook page are overwhelming from men and those via email are mainly women, perhaps a party can increase communication to women by reaching out directly through email communication.

One common acronym used for goal setting is SMART. This means that goals should be:

- **Specific**, or well-defined and focused. For example, rather than simply "Get more votes," a goal could be "Increase vote share among women and youth in Province X."
- **Measurable**, otherwise the end is indefinite. For example, "Open more branch offices" is an endless goal. By contrast, "Open five new branch offices" provides a definite, reachable target for party staff.
- **Attainable** and realistic. For example, every party wants to garner a majority in the legislature, but a small party that received a five percent vote share in the last national election is unlikely to do so. The party could set a more attainable goal by instead aiming for a 40 percent increase in the number of seats it holds. Further, voters and the media measure the party by the stated goals of party leaders. If the goal is to win 20 new constituencies but the party only wins ten, then it failed even if those ten seats represent a substantial improvement.
- **Relevant** to the party's overall objectives and strategic vision. A party should develop a long-term strategic plan and set all goals accordingly. For more information on strategic planning, see IDEA's Strategic Planning for Political Parties
- **Time-bound**, so that there is a clear deadline for goal achievement. Creating a clear timeline also helps parties select interim goals and plan periodic assessments. The plan page discusses these concepts in more detail.

Party goals should address the problems identified in SWOT analyses and during the strategic planning process. Goals can address weaknesses, build strengths, take advantage of new opportunities and minimize perceived threats, among other things. Adhering to the SMART criteria is one way to set well-defined, attainable goals.

# What Types of Technology Can Help?



Once a party has conducted a SWOT analysis, identified the problems it wants to address and developed SMART goals, it should have some idea of the steps it can take to achieve those goals. New technologies can help a party achieve some of its goals, but not all. For example, a party might have long-standing organizational challenges that it needs to address; in some cases, it might not have the capacity to implement an ICT program. After an assessment, if a party realizes that one of its weaknesses is a lack of focus and expertise on policy development, it might need to change its processes, reorganize, or identify and hire policy experts. Although technology can help accomplish some of these steps, simply utilizing new technology is not a primary strategy.

Once it establishes clear goals, a party should assess the time and resources — both financial and human — available to achieve those goals. If there is an an upcoming election, for example, the party might not have enough staff or member time to devote to a new initiative. In this situation, the party has to allocate resources carefully. The worksheet on selecting tech tools helps parties think through important considerations when choosing new technologies.

The steps outlined above can help decision makers within the party identify tech tools that can lead them to accomplish their goals within their means and their specified timeline. These steps also help decision makers decide if a tool is unrealistic for their party because they do not have the available time or resources or if ICT solutions are simply not a good fit at the present moment. ICTs cannot solve every problem; in fact, if improperly applied, they can create expensive new problems.

If a party believes it needs to improve its member engagement in order to perform better in an upcoming election, for instance, then it should identify tactics for engaging members. If these tactics require new tech tools — such as a member database, an email newsletter or a members-only section of the website — then the party should discuss those options and determine if it has the resources, manpower and time available to use them. If, in this example, the party wants to improve its connections with young voters, and it identifies Facebook as a viable outreach tool, then it must determine whether there is a qualified staff member who can dedicate a percentage of his or her time to the Facebook page. If staff time is limited and no one can work on the page beyond setting it up, the party should look for another solution.

A party should also assess its local technology environment to determine whether ICTs are a good fit. If the majority of young people do not have a smartphone or other access to the internet, then Facebook is not the right solution in this instance. The section on understanding your tech environment can help a party make these decisions.

After identifying problems and developing goals, a party must select the technology tools necessary to achieve those goals. Temporal, financial, labor, technological and environmental constraints can impact the tool selection process. See the worksheet on selecting tech tools for more details.

# Selecting ICTs and Tools



After examining its needs and environmental and financial restrictions, a political party must finally decide what specific tech product will be useful. This manual discusses a range of tools, from email to voter files, but not every tool will fit every goal or every party; the right tool depends on the party's goal, resources available and ICT environment. For this manual's purposes, party activities fall into three broad categories — outreach, policy development and management — and a tool's appropriateness depends on which of these areas is relevant to the party's goal.

Several resources are available to assist parties in determining which tool is the best fit for their needs. This matrix lists some of the categories and subcategories of party activity, and outlines what types of tools can facilitate each. The How Tech Can Help page on this site discusses in more detail each of the main areas of party activity and how technology can be useful. The toolbox page outlines some of the specific tools helpful to a party. Finally, the worksheet on questions to consider when choosing technologies highlights key questions a party should answer before embarking on an ICT program.

Of course, selecting the type of tool is not the final step. Once a party decides what kind of tech tool it wishes to use, it must select a specific product. For example, if a party decides to start a centralized member database, it must decide whether to use a free product like Google Docs, a Microsoft product like Access or a customized (but likely expensive) product. The section on essential considerations and the following worksheets will help parties navigate some of those complicated choices.

**Helpful worksheets for tool selection:**

- Cost: A series of questions parties should ask themselves to ensure that they are aware of all short- and long-term costs related to a potential tech solution.
- Custom vs. Off The Shelf (OTS) Software: A series of questions to help parties think through the pros and cons of both custom-made software — which is specially developed by a vendor — and off-the-shelf software, which is ready to be used as soon as purchased.
- Proprietary vs. Open Source Technologies: An explanation of the differences between proprietary systems, usually purchased from a vendor and specifically designed to fit the party's needs, and open source technologies, which are free to use and adapt and are available online.
- Questions to Consider When Choosing Technologies: Questions that help parties plan ahead to avoid common pitfalls and challenges when adopting new technologies.

When selecting a specific type of ICT or tool, a party should consider how the tool addresses each of the three main party activities. To decide which specific *product* is best, a party should consider cost, the pros and cons of both custom and OTS software, and whether it wants to purchase software or use open-source technology.

# Essential Considerations



Before embarking on a technology project — even a small one like putting up a Facebook page — a party should consider several important factors.

### Environment

Technology projects must function in the environment(s) in which the party plans to use them: for example, an internal communications tool will not do much good if it requires an online connection unavailable to many users. Additionally, if a party is in a country with spotty electricity and lacks a generator for backup, relying on technology may not be cost or time effective. Likewise, technology needs to match the security environment that a party operates in; if the government in power is spying on the party's work or is actively trying to undermine it, application security will be a central concern. For more information, please see the understanding your tech environment section. For a list of different tools that can help parties enhance internal communication, please see the Common Internal Communications Channels worksheet.

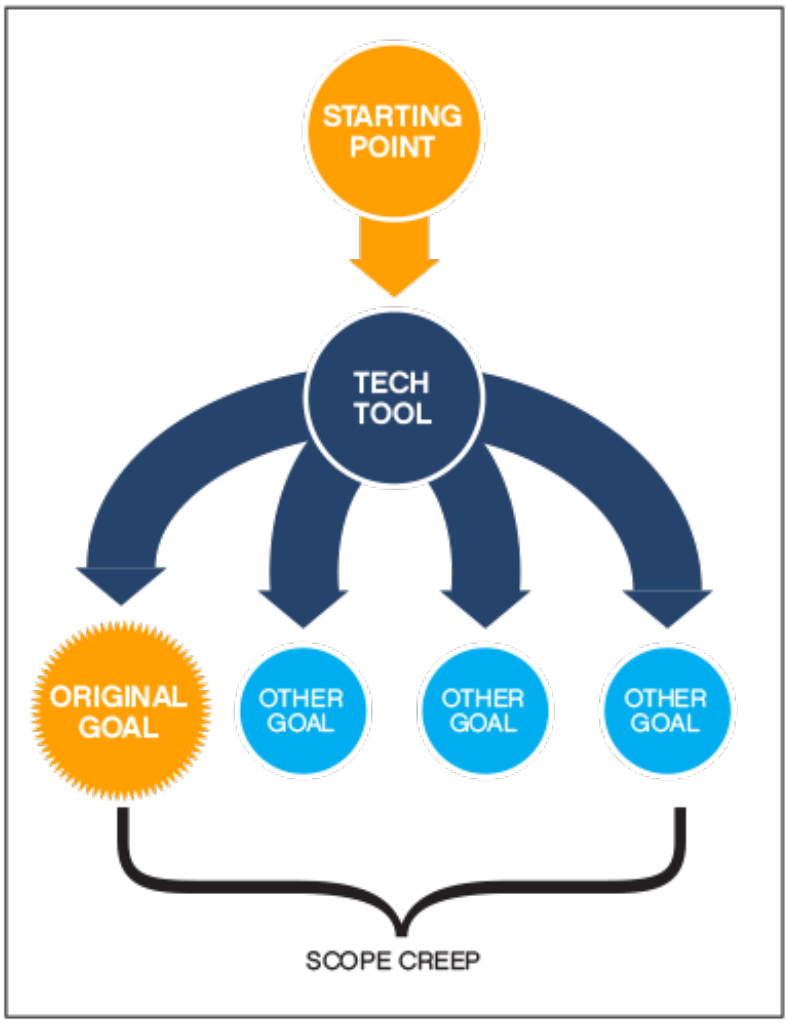
Technology projects rely on another kind of infrastructure: human skills. People design, build, configure and maintain software and hardware, and the types of projects a party can successfully undertake depends significantly on the strength of the technologists upon whom it can call. If a party chooses to enlist a type of technology that only a handful of people in the country have expertise with, the party would not be able to maintain the technology over time if those people become unavailable. A party should carefully match the technologies it chooses to the talent available to build and maintain them. For more information on understanding different environments and the challenges therein, please see the section on common tech environments.

In many cases, even when technology tools and personnel are available, the cost of employing them can be prohibitive. Parties need to consider the hidden costs of a given tool, from hiring vendors and purchasing the product to the cost of employees utilizing the tool over the long term. These costs can detract from other party efforts, and are often overlooked during busy campaign periods. To better understand the short- and long-term costs involved in hiring a tech firm, please see this worksheet; to better understand the hidden costs involved in using custom-built tools versus open-source technologies, please see this worksheet.

Another important consideration is whether technology reaches and is available to women. For example, in some cases women can not go into public internet cafes, do not have control of the use of a mobile phone or simply are not taught how to use computers. Assuming equal access to technology in any environment may mean the party's message is not reaching much of the population. For more information on women and technology, see NDI's report on Women, Technology and Democracy.

### Levels of access

What levels of access will the system require? A party must assess if the program will be a staff-only application, used exclusively on desktop computers in the party's headquarters, or an online application that many different users can access remotely. Additionally, depending on the tool's purpose, a party may consider giving members of the public access, as well. Some tools have different levels of user access, with basic users able to use some features but not the full power of the tool. Many data management systems, for instance, allow lower-level staff to access information but not edit it. These questions have obvious security implications.




### Features

Once a party has identified the specific goals of a technology project, it should work with technologists to develop a clear list of features to be included in the project. For example, a mobile phone app for party members might include mechanisms for viewing the party's policies or platforms, watching videos of party events, voting on party initiatives, obtaining talking points for outreach and persuasion, and accessing a GOTV training curriculum.

Details matter. If each main feature has several sub-features, the lower-tier attributes should also be defined carefully. Disagreements over expectations are a common source of problems between technology vendors and their clients, and beginning by clearly defining the features the party expects to receive as part of a particular technology project can help avoid confusion and conflict as the project proceeds.

### Scope creep

One reason specifications are important is the problem of "scope creep," in which a project designed to solve one set of problems gradually and almost unconsciously morphs into something much larger. For instance, the party might ask to add features one-by-one during the development process, and while individually, none require much additional time or resources for the technologists to implement, collectively they might change the direction of the project significantly. Parties should therefore be aware of each little addition and make sure that over time, these small additions and delays do not cause significant changes to the project's budget and timeline.

While scope creep is obviously a problem for technology vendors, who wind up performing additional work without a prior discussion on costs, it is also a problem for the political party: scope creep is a major cause of missed deadlines and late projects. Having a clear specification document at the beginning can keep projects on time and within budget. Further, having clearly delineated goals will also help prevent a party from making changes that do not contribute to the predetermined strategy.

Before starting a project, a party must consider its technological and security environment, whether it will include different levels of access, specific project features, and the possibility of project scope creep.

# Planning and Rollout

tech4parties.org/planning-and-rollout/

Once a party has developed its goals and determined which ICTs can help it meet them, it must devise an implementation plan, which is essentially a roadmap for what needs to occur for a goal to be met.

Well-designed goals are specific, measurable and time-bound. If a party has been diligent in its goal-setting process, it should already have an endpoint in mind for its implementation plan. Consider a party whose goal is to centralize its member database and transfer it to a cloud-based system within two years. After setting that goal, the party would develop an implementation timeline. First, the party would create a list of the steps required to reach its goal; each step would be a discrete task on the path to the overall goal. Those steps might include:

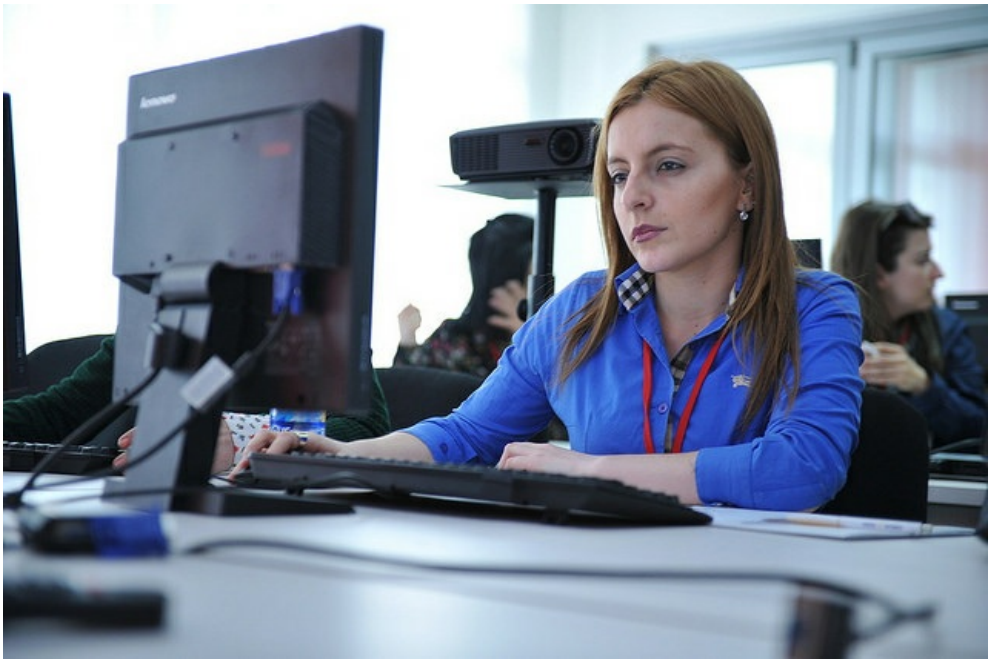
- Purchasing the software package;
- Completing any required customizations;
- Training branch office staff on how to use the system;
- Training system administrators on how to manage and update the system; and
- Loading member data from the national headquarters and all 20 field offices into the system.

Once it has listed the necessary steps, a party can work backwards from the endpoint to determine which steps need to be completed by what time. In the above example, in order to centralize all data in 24 months, the party would need to know when the software must be purchased, how long the customizations would take and their deadline. Using this information, the party would be able to create an implementation timeline. For more information on implementation timelines, click here.

A good implementation plan details who is responsible for each element of the plan. It is relatively unusual that one person would have the sole responsibility for implementing the entire plan. More commonly, an individual or small group is responsible for each discrete step. It is critical to ensure that the people assigned to each task have the skills, expertise and experience to accomplish it. In some cases, it is necessary to bring in outside experts or provide training for staff. For example, it is unlikely that a political party would have a staff member with the expertise to customize a database software package. However, once the customization is complete, staff members could learn to train members on how to use the system.

The final element of the plan is the budget. Budgets outline the financial commitments required to implement a new project. A party must remember that the up-front cost or monthly service charges of a new software program are seldom the only expenses associated with a project. Staff time, training, maintenance and upgrades are just a few of the additional costs that a party should consider. This worksheet asks parties questions to help them think through all possible expenditures, in order to ensure they have as reliable a budget as possible. A typical budget might include the following elements:

-



Hardware costs;

- Software development/acquisition costs;
- Internal staff time, both immediately and over the long term;
- Training;
- Long-term maintenance; and
- Future upgrades.

For a more detailed list of expenditures, please see this worksheet.

Unfortunately, many technology projects exceed their budgets. An old rule of thumb is to take the initial budget, double it, and then add 20 percent to arrive at the real cost. To avoid this, it's absolutely vital to set clear goals, specifications and timelines. Even when the system is installed and the party reaches its goal, it will have to continue investing in the technology; there might be ongoing maintenance fees, for example, and the party will have to train new staff on how to use the system. Successful technology projects don't "just happen": they are the product of good planning, good management and clear goals.

### Interim goals, iterative projects and phased rollouts

Some technology projects are built all at once, but it often makes sense to build them in stages. For instance, a comprehensive party data management system might start with a single piece — perhaps a party membership database. With the initial segment in place, the project might progress to building other pieces of the party's data infrastructure; each section will have its own specifications, timeline and budget.

Please see the following worksheets for more details about coming up with a specifications (specs) document, a timeline and a budget.

- Specifications documents ("Specs"): This outlines what should be included in a specs document and gives tips for ensuring that the document is a comprehensive, useful tool for the party.
- Project timeline: This worksheet includes considerations to ensure that the project is not delivered too late or missing an important event, such as an election day. It also includes a very simple sample timeline and tips for creating a real one.
- Budget: This is a list of questions to help parties think through all of the long- and short-term costs associated with adopting a new tech tool.

A project might roll out in stages, with more capable iterations replacing early versions. Many website projects roll out iteratively, with more complete versions of the site replacing the simple initial version, which may be just a single page. Iterative projects are not complete "out of the box": they evolve. This renders them easier to put on hold if necessary and allows for the entire effort to change direction as needed. Again, each stage in the process should have clear specifications, a timeline and a defined budget.

Another approach is to roll out technology to different audiences in sequence. For example, a party might apply a branch office management system to a single province or region first so that it can identify and fix bugs, and so staff can gain experience before the entire party moves to the system. In this case, the first users serve as a test case for the technology before the party commits to a full-scale rollout. This approach is also useful if a party is unsure the technology is appropriate; it allows the party to test a particular technology on a smaller scale.

Beginning with a test case can be a good way to ease senior leadership into new technologies; the leadership might resist party-wide change but welcome smaller, more exploratory projects. After testing the technologies on a small scale, the party can decide whether to invest in them for the broader organization.

# Periodic Assessments

tech4parties.org/planning-and-rollout/periodic-assessments/

Once a party starts the new ICT implementation process, it should conduct periodic assessments to make sure the project remains on track. Well-defined goals and clear timelines are important to this process. However, even after it achieves its goals, a party should continue to assess its projects to ensure that they are still useful and true to their original purposes. If the party did not start by setting a clear measurable goal, this assessment is more difficult.

The assessment process can vary depending on a project's nature. However, some elements should remain constant. Prior to project completion, a party should assess its progress against the timeline it set during the planning phase. It might ask the following questions:

- Have all of the schedule's intermediary tasks been completed to date?
- If not, why not?
- Are there adjustments that can be made to ensure that remaining tasks are completed on time?
- How have costs compared to those projected in the budget?
- Is the project on track for timely completion, or does the timeline require an update?
- Will the project require more time, resources or money to complete than initially planned?
- Does the project reach its target audience? If not, why not, and what part is missing? What can the party do to reach this audience?

The periodic assessment should not stop once the project is complete. If ICT tools help a party achieve its goals, then the party must also take the time to assess the details of their impact. For example, if a political party chooses to set up a Facebook page to provide an avenue for youth engagement, then the assessments should not stop once young voters are using the site. The party should continue to assess whether that engagement translates to offline action such as votes or increased party membership, and whether young voters are still engaging on that channel or have moved to another social media site. The party should also assess whether young men and young women are using the Facebook site equally, or if there is a gender gap in usage and why.

Assessments are much more effective when planned in advance. Forward planning allows a political party to consider the types of assessment questions it wants to ask and from whom it should gather feedback. Further, party operations can be chaotic, especially at election time or other busy moments in the party calendar. Advance planning of the assessment process makes it more likely that the party will have time and resources available for this important task when necessary.

Due to unknown variables, it is rarely possible to perfectly follow a project timeline or budget. However, having a clear goal, a planned route to achieving said goal and periodic assessments will help party staff stay on track as they work to incorporate new tech tools into their daily routine. While it may be easy to brush these steps off — as they require extra time and effort — they are critical in keeping party staff accountable for the work that needs to be accomplished in both the long and short term. Failure to go through the proper planning steps often results in projects taking longer than expected, going over budget or failing altogether.

**Planning and rollout**: A party must plan a project's implementation before executing it. A good implementation plan lists ordered steps, details who is responsible for each element and includes a budget. Sometimes each segment of the plan will have its own implementation process, and sometimes a party will choose to roll it out in iterations or phases.

**Periodic assessments**: Even after it achieves its goals, a party should conduct periodic assessments to ensure the project is still useful and achieving its original goal, charting its progress against the original timeline.

# Worksheets | NDI

tech4parties.org/worksheets/

**Worksheets**

## Basic Voter File Requirements

To be effective, a voter database must have unique voter identification numbers, a dedicated administrator, and a set of forms that are easy for activists to use. Above all else, the database should record each voter's name, address, and polling location. However, data collection is challenging. A party can buy data, collect it directly from voters or by observing them, or acquire an election body's official list.

## Common Internal Communications Channels

Internal communications help parties encourage efficient collaboration. Some common channels of internal communication include email and email listservs, custom or private social networks, conference calls, internet-based phone calls, SMS, and videoconferencing.

## Cost

A party must account for the acquisition, setup and ongoing maintenance costs of adopting new technology, in both the short and long term. For example, it should consider the costs of software and hardware purchases, installations and security. And although some data storage and software updates are free, others cost money and require security.

## Custom vs. Off-the-Shelf Software

To determine whether a project requires ready-to-use off-the-shelf (OTS) software or custom-built software, a party must consider the project's needs and budget. Factors such as vendor-led installation, customer support availability, and the OTS software's fit with the party's current and future technological environment and security needs should guide the party's decision. If OTS software cannot meet project goals, the party should consider whether custom-built software and software-building vendors could meet the project's goals and budget.

## Project Timelines

A party must consider a project's realistic timeline, which should include extra time for testing, evaluation and delays. It should outline short and long term milestones throughout the timeline, and should be divided into ordered segments that work toward a specific deadline. The party should mark segments for review if necessary, and should assign and train staff according to segment and sub-segment goals. It must incentivize compliance and expect the unexpected.

## Proprietary vs. Open-Source Technologies

Open-source technologies are available to the general public at little to no cost, while proprietary technologies are owned by vendors and sold to organizations. Open-source technologies often require adaptation, customization or configuration before use, a process that can demand significant staff or vendor time; they also often lack comprehensive documentation and technical support, which can also raise costs. Proprietary technologies can tie a party to a particular vendor; however, that vendor might be incentivized to provide long-term support to the party.

## Questions to Consider When Choosing Technologies

A party should consider a project's short- and long-term goals, determine how the technology can fulfill those goals and adapt to new ones, and carefully review the technology's political, legal and cultural limitations.

## Specifications Documents ("Specs")

Project specifications, or "specs," should outline a project's objectives in great detail. A good spec might include the project's goals, constraints, features, examples, budget and/or timeline.

## Targeting Voters

A party must identify its supporters and undecided voters. The total number of party supporters plus the targeted groups of undecided voters should surpass the party's goal of total votes needed to win. When identifying voters, a party should consider each voter's region, age, preferred channels of communication and level of party support. It can do this through voter contact or public opinion. In the end, a party should be able to identify likely voters and know how to best communicate with them.

## Tech Firm Selection

In order to choose the right technology vendor, a party must consider the vendor's expertise, experience and references relative to a project's goals. The party should also consider potential conflicts of interest with the vendor and whether the vendor adheres to the party's legal and moral standards. Vendors should have the capacity to work on the project and maintain it over time.

## Understanding the Tech Environment

A party must keep its target audience in mind when adopting new technology and conducting research is key to this task. It should consider whether

and to what extent a communications tool is popular, whether the audience has internet access, and whether legal, cultural or socioeconomic issues affect the chosen communications tool. Once a party understands its tech environment, it must adapt its communication strategy. In high-tech environments, smartphones and the internet are near-universal. In low-tech environments, internet access is rare, SMS is the most common form of communication and radio is key. The party must remember that both environments can exist within the same country, necessitating a mixed strategy.

# Basic Voter File Requirements

tech4parties.org /worksheets/basic-voter-file-requirements/

*This worksheet can be used to help a party decide if it has the minimum necessary resources needed to build and utilize a voter file, in both its central office and branch offices. For more information, please see Selecting ICTs and Tools.*

The databases is the basic building block of all political party technology. Once a party starts tracking data and adding to it over the years, the database will gradually become more robust. However, building it is the easy part: collecting the data itself can be challenging.

When database and voter files were first built in the United States, they were simple files that allowed for the sorting of data that could then be printed in useful formats: for example, door-to-door walking lists printed in address order, phone lists, mailing lists, or district or neighborhood lists for election day operations. For more information on member databases, why they are important and how a party can use a database in a lower tech environment, please see the corresponding sections.

A simple database requires several things to be effective:

1. A unique identifying number for each voter to make sorting and matching data efficient.
2. A dedicated administrator to make sure that data entry is done in a consistent and timely manner.
3. A set of forms that are part of the system, so that the list of addresses for door-to-door canvassing, phone lists, etc., look the same every time and are easy for activists to use.

| | |
|---|---|
| **Essential Data** | • Name of each eligible voter;<br>• Physical address of the voter; and<br>• Polling location where the voter is eligible to vote |
| **Important Data** | • Age;<br>• Annual income;<br>• Ethnicity/race;<br>• Gender;<br>• Occupation;<br>• Party or candidate preference;<br>• Phone number; and<br>• Vote history. |

1. If possible, acquire an official list of eligible voters from the election management body;
2. Buy data from a cell phone company;
3. Collect data organically by talking to constituents and recording their responses; or
4. Collect data on election day by observing which voters show up to vote.

# Common Internal Communications Channels

tech4parties.org/worksheets/common-internal-communications-channels/

A party or campaign will often share information between offices on a daily basis, meaning that internal communications are a critical part of party or campaign operations. However, organizations often struggle to find the correct internal communications balance between information overload and information silos. While they can also be used in external communications with supporters, these ICTs can help parties facilitate better intra-party collaboration and can streamline internal communications processes.

| Tools | Strengths | Weaknesses |
|---|---|---|
| **Email** | • The core one-to-one and one-to-many communications channel of the internet.<br>• Easily facilitates conversation among staff and activists. | • Constituents and supporters can get overwhelmed by the number of emails and may not open or read them.<br>• Messages sent out to many recipients may end up in a user's "spam" mailbox. |
| **Listservs** | • Can create an online/virtual community.<br>• Allows multiple people to communicate amongst themselves. | • Unless regulated, responses may be sent to all members of the listserv, causing mailboxes to become overcrowded.<br>• Difficult to regulate conversation: can be used to discuss topics not related to the listervs' topic. |
| **Custom/private social networks** | • Can allow members to speak with many of their peers simultaneously.<br>• Creates space for discussion between members. | • Members must have reliable internet access and an account with the network being used.<br>• Limited control over functionality and data. |
| **Conference calls** | • Several participants can be connected on a single phone call.<br>• Facilitates planning and collaboration between party staff and activists. | • Can be expensive, and party must pay bill.<br>• All members of the call must know when the call is scheduled and be near a phone at the right time. |
| **Voice Over Internet Protocol (VOIP)** | • More cost effective than traditional landline.<br>• If there is decent internet, all members of the group can use the internet to speak to each other through the program for free. | • The person making the call must have decent internet access or the call will be choppy. |
| **Videoconferencing** | • Can turn phone calls into visual experiences, allowing people to see each other as they talk. | • The sound and image can be choppy if the internet connection is not very fast.<br>• Both members of the call need to have a video camera and decent access to the internet in order to participate. |
| **SMS & SMS Apps** | • Facilitates quick communications in rural or low-tech environments.<br>• All cell phones — both old and new — have the ability to receive SMS messages. | • Can only send a limited amount of information.<br>• Those receiving a message must have a working cell phone and cell service. |

# Cost | NDI

tech4parties.org/worksheets/cost/

### Cost

Many technologies become much more expensive than expected when all associated costs are taken into consideration. For a party to be sure that it is prepared for all short- and long-term costs, it must ask itself these questions:

- What is the real cost of a potential tech solution, taking into account the software purchase, creation or customization, as well as its installation, training and staff time?
- Will the technology require additional hardware, such as computer network servers, hard drives, or smart phones, and if so, will that hardware need to be hosted in a physical location owned or rented by the party? This hosting may incur additional security costs, such as security software upgrades; additionally, the hardware will have to be replaced in the future, as most computers last only about five years before they become too outdated to be compatible with current software updates.
- Will the project require online data storage, and if so, how much? Be sure to understand the security implications of storing party data online.
- Will the technology require significant online bandwidth? Be sure to research the price of improved bandwidth if needed.
- Will the technology require software updates in the future, and if so, what is the direct cost and does it include staff/vendor/consultant time?
- If a project is being implemented incrementally, with new features being added over time, can early technology choices influence the longer-term costs? Be sure to include the cost of all desired upgrades and their associated requirements.

A party should consider three cost categories: acquisition costs (buying the tool's necessary hardware and software); setup costs (the price of installation and professional training); and ongoing costs (hardware and software maintenance, and ongoing labor).

| Types of Costs | Price |
|---|---|
| 1. Computer | 1. $1,000 |
| 2. Internet modem and router | 2. $200 |
| 3. Accessories: mouse, keyboard, speakers, connector cables. | 3. $75 |
| 4. Software (e.g., Microsoft Office, security program) | 4. $500 |
| **TOTAL** | **$1,775** |
| Setup Costs | |
| 1. 2 days of onsite professional services (at $500 per day) | 1. $1,000 |
| 2. 3 days of administration training (at $1000 per day) | 2. $3,000 |
| **TOTAL** | **$4,000** |
| Ongoing Costs | |
| 1. Hardware maintenance (at 20% of acquisition cost) | 1. $200 |
| 2. Software maintenance (at 20% of acquisition cost) | 2. $100 |
| 3. Labor (at $50 per hour, 4 hours per year per computer ) | 3. $200 |
| 4. Staff time (at $10 per hour, 40 hours per week) | 4. $13,000 |
| 5. Year two staff cost ($8 per hour, 20 hours per week) | 5. $8,320 |
| 6. Software/Hardware upgrade after two years | 6. $800 |
| **TOTAL** | **$22,620** |
| **TOTAL** (one year) | **$28,395** |

# Custom vs. Off-The-Shelf Software | NDI



**Custom vs. Off-The-Shelf Software**

Project planners may confront a choice of whether to purchase and then possibly adapt off-the-shelf (OTS) software or hardware, or to ask an internal tech team or an outside vendor to build custom software. If it is unsure which to use, a party should ask the following questions:

Does OTS software already exist that would meet the needs of the project?

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Does that OTS software need to be modified or adapted to meet the needs of the project? If so, to what degree?

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Does that OTS software need to be modified or adapted to meet the needs of the project? If so, to what degree?

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Is the total cost of the OTS software, including purchase, installation, configuration and modification, within the project budget, both in the short- and long-term?

Yes No

If so, does the OTS software have a history of requiring upgrades or changes that might conflict with any modifications made by the party's tech team or vendors?

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Is a vendor needed to implement or support the OTS solution? Is such a vendor available?

Yes No

What support is available from the OTS software company? Do they offer day-to-day customer support, and/or will they install and configure the software themselves?

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Does the OTS software have particular requirements that may be difficult for the party to fulfill? For instance, "cloud" applications are based online rather than on a specific office computer and typically require consistent internet access, which may not be available in all technological settings.

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Does the OTS software meet the party's security needs? If not, will security require additional software, such as a network firewall?

Yes No

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Will the OTS software be able to scale/grow to meet the party's future needs, and will scaling require additional costs such as software modifications, bandwidth or data storage?

Yes No

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Will either a custom or an OTS solution require the purchase of additional hardware?

Yes No

If there are project goals that cannot realistically be met by OTS software, a custom solution may be the only answer. If so, the party should ask:

*Is a vendor available that can create the custom software?*

Yes No

*Can that vendor maintain the application in the future? This process includes installing upgrades and patches to the software, and to any associated systems it requires.*

Yes No

*Is the custom software within the project's cost parameters?*

Yes No

*Is the custom software designed to scale and grow as the party's needs change?*

Yes No

*Is the custom software tied to the vendor that created it? Will other technologists be able to maintain and upgrade it if the original vendor is no longer*

*available?*

Yes No

For more considerations, see the sections on choosing tech tools and on tech firm selection.

# Project Timeline | NDI

tech4parties.org/worksheets/project-timeline/

**Project Timeline**

Time is another vital consideration in technology projects because a tech solution that arrives too late — e.g., the day after a vital election — can have dire consequences. A party should consider the following before the implementation of a tech-based project.

- The length of time it will realistically take to purchase, install, configure, modify, troubleshoot and train staff for a new tech project. Extra time should be taken into account to accommodate unforeseen delays.
- The overall project timeline — that is, what the party will need to accomplish in the short-, medium- and long terms. A party should consider key milestones, such as party meetings and elections, that will influence project timing and possibly shift party priorities.
- Time for testing and evaluating the tool. Rolling out a new technology before properly testing it can be an expensive mistake. This case study looks at two projects, Narwal and ORCA, from the U.S. 2012 presidential election: one tool was tested and ready for the strain of election day and the other was not.
- Establish a project completion/launch date and work backwards. For example, if the project must be ready by November of a given year, establish the project timeline based on that date. Ideally, the project deadline should be set some weeks or months before the technology is absolutely required to work.
- Identify essential project segments and tasks, as well as sub-segments and sub-tasks (i.e., the parts that make up a larger project segment or task).
- Identify dependencies among the segments and tasks. In other words, understand which parts must be completed before other parts can begin or finish.
- Identify which party staff and/or contractors will be required for each segment or task. If tasks are concurrent, be sure that staff are not over-committed.
- Identify segments and tasks that will require review and approval by the client or end user. Build in time for the review process and for changes that may be requested after review.
- Identify training that may be required before party staff can use the technology and incorporate it into the timeline. If staff training will require the technology to be fully operational, that time must be added to the schedule as well.
- Based on the essential tasks and dependencies, establish milestones/interim goals and assign due dates to them.
- Based on milestones, assign dates for review and evaluation of project segments and tasks.
- Build in time for project testing and troubleshooting.
- Prepare an enforcement strategy for the timeline. A timeline won't be effective if people don't stick to it.
- Whenever possible, build extra time into the timeline. Technology projects almost always take longer than expected.

| Date | Task | Notes |
|---|---|---|
| 15 March–28 March | Write up scope of work for vendor and finalize project budget. Research vendors for the project; be sure to consider any conflicts of interest. | |
| 29 March–15 April | Send scope of work and budget to party leadership for thoughts and approval. | Send on the 29th, be sure to receive it back by the 15th. Always build in more time than you think you need. |
| 5 April–15 April | Send out scope of work to vendors and ask for estimate. | Send to at least three vendors. If pricing varies significantly, reach out to see if there is a misunderstanding. |
| 16 April–4 May | Choose vendor and send out contract to sign. | Be sure to include a memorandum of understanding. |
| 5 May–9 June | Vendor works on the project. | Stay updated via phone calls or emails to make sure the vendor is on track and on time. |
| 10–17 June | Troubleshoot and test the tool, making sure there are no glitches, it is user-friendly and can address all the party's needs. | This is an ongoing process; sometimes vendors have a yearlong contract with clients to ensure they are on call if anything goes wrong with the tool in the first year. |
| 10 –12 June | Staff training of trainers on how to use the tool. | Vendor can train a small number of party staff on how to train others to use this tool. |
| 15–26 June | Trainers teach party staff how to use the tool, what the tool can do and how others in the party are using the tool. | These can be ongoing trainings for new staff. |
| 30 June | | Program must be completed by this date for funding purposes. |

# Proprietary vs. Open-Source Technologies | NDI



**Proprietary vs. Open-Source Technologies**

A party often faces another tradeoff when considering whether to use open-source technologies or proprietary ones owned by a particular vendor. Open-source software – typically built and maintained by a community of volunteer technologists – is usually free to acquire, and if its developer community remains active, it may be enhanced by regular upgrades and extensions that add new capabilities without the party having to build or buy them. Widely used open-source tools like MySQL (for data manipulation), and Drupal or WordPress (for website hosting) might already have a large pool of expert users available, giving the party access to a wide base of future support staff.

Open-source software does have downsides, though. Documentation is often scarce, meaning a party might struggle to learn how to use and maintain it properly. And like any off-the-shelf system, an open-source platform might need expensive modifications or customizations before it can meet a party's particular needs. Finally, open-source software depends on volunteer time for long-term development, and if the volunteer experts behind it lose interest, the software can become outdated and eventually obsolete or unusable.

Proprietary systems, by contrast, usually cost money, and some will be prohibitively expensive for a cash-strapped political party. These systems wed the party to a particular vendor, meaning it is subject to that vendor's customer service and must rely on the vendor for long-term development of the product. Sometimes an organization finds itself stuck with a toolset developed by a company that has since gone out of business.

However, companies have an incentive to support the technologies they build, and they are likely to create comprehensive documents and other support materials — such as training videos and tutorials — to help users put it to work. A proprietary software package can sometimes end up costing less than a "free" open-source solution, once all factors are taken into account.

Therefore it is important to consider the following if thinking about using open-source tools: they will often need to be adapted, customized and/or configured before use, a process that can require significant staff or vendor time; and they often lack comprehensive documentation and technical support, which can also drive up the real project costs.

| | Pros | Cons |
|---|---|---|
| **Proprietary** | • Built in support from developer<br>• Support materials and/or trainings are available from developer<br>• Price often includes all modifications and customizations, and can include training and support | • May be beyond the party's budget<br>• Tied to a specific developer, which could have bad customer service and/or go out of business |
| **Open Source** | • Free to acquire<br>• With active developer community, regular upgrades and extensions may be automatic<br>• For popular tools, a large pool of expert users may already be available | • Support materials may be hard to find and/or nonexistent<br>• May need expensive modifications or customizations to meet a party's needs<br>• Relies on volunteers for long-term development, may begin to fall behind the times and become obsolete without continued upgrades |

If the choice is difficult, a party should ask the following questions:

Is commercial software or open-source software already available that would meet the needs of the project better than any alternative?

Yes No

Does the software need to be modified or adapted to meet the needs of the project? If so, are the necessary skills and time available?

Yes No

Is a vendor needed to implement or support either solution? Is such a vendor available?

Yes No

Does the party's tech vendor prefer one option to another? For instance, if the vendor has extensive experience with either the commercial or the open-source option, the company can likely install, adapt and configure it more cost-effectively than if it needs to learn a new system from the ground up.

Yes No

Are philosophical or political considerations involved in the choice between proprietary and open-source software? An anti-corporate party would likely favor open-source options for ideological reasons, for example; a commercial vendor may be off limits if it is working with a rival party.

Yes No

Is the total cost of either option, including purchase, installation, configuration and modification, within the project budget?

Yes No

When all costs are considered, does either option become clearly more cost-effective in the short- and long-term?

Yes No

Does either option have a security advantage? If a commercial vendor is working with other political parties or organizations, does it have internal procedures to prevent the improper passing of information?

Yes No

Does either option have an advantage when it comes to upgrades and software patches, particularly those related to security?

Yes No

Does either software package have a history of upgrades or changes that might conflict with any modifications made by the party's tech team or vendors? Upgrades can sometimes "break" a system that has been heavily customized.

Yes No

Will either option tie the party to a single vendor, or will other technologists be able to maintain and upgrade it if the original vendor is no longer available?

Yes No

What support is available from the commercial software company? Do they offer day-to-day customer support, and/or will they install and configure the software themselves? If so, this capability should be figured into the cost considerations.

Yes No

Does either software package have particular requirements that may be difficult for the party to fulfill? For instance, "cloud" applications are based online rather than on a specific office computer and typically require consistent internet access, which may not be available in all settings.

Yes No

Will either option be able to scale/grow to meet the party's future needs? If so, will scaling require additional costs such as software modifications, bandwidth or data storage? Does either option have an advantage in positioning the party for long-term success?

Yes No

# Questions to Consider When Choosing Technologies

tech4parties.org/worksheets/questions-to-consider-when-choosing-technologies/

Careful planning can help a political party avoid many common tech pitfalls. Party staff, consultants and vendors should consider the following questions before embarking on any significant technology project. For more information on goal-setting and planning, please see the section what types of technology can help?

What objectives will the project help the party address?

How do the project's specific goals fit into the party's broader goals, both in the short- and long-term?

Does the technology tool under consideration fit those needs and goals?

Yes No

Is the particular tech solution adaptable, if party goals change significantly in the near future?

Yes No

Does the tech solution risk tying the party to software or hardware that is likely to become obsolete soon?

Yes No

Are there political or legal considerations to the tech solution? For example, many countries have laws against the collection and manipulation of data on individual citizens.

Yes No

Is it possible that people may resist using a particular technology for cultural reasons? For instance, in some cultures it is not common for women to use mobile phones.

Yes No

Does a particular tech solution require conditions that simply do not exist, such as broadband internet, secure online communications, or the widespread use of smart phones? For more information on this, please see the Understanding Your Tech Environment section.

Yes No

# Specifications Documents (“Specs”)




Project specifications documents or “specs,” provide a comprehensive description of all of the project’s objectives. A good spec includes:

- Project goals, in both the short- and long-term, if appropriate;
- Project constraints, including technological, philosophical and human constraints, among others;
- Expected features, including those available to the user and those only available to the project’s administrators;
- Use cases, which are examples of how the product will be used in practice;
- Case studies, which are examples of how the product *has* been used in practice;
- Maintenance considerations, such as how the party plans to maintain the product without the benefit of the vendor’s expertise;
- A budget, unless the spec is designed to help a vendor determine a budget; and
- A timeline, for the product’s completion and for its implementation.

But a good spec does not just include these items; it communicates them well. Here are some tips on how to create an good spec.

- A spec should include as much detail about the project’s objectives as possible. The price of forgetting an important detail is too high for a party to sacrifice absolute clarity for word count. If the spec runs several pages on a mobile app, PDF or other virtual document, there is no reason to panic.
- A spec must be as explicit as possible. Repetition is not necessarily bad if it clarifies the project’s objectives.
- The language of a spec should address users and/or project developers as if they know nothing about the project. This ensures clarity of product objectives.
- Make sure use cases alternate between a list of requirements and narratives. In other words, some use cases should be “user stories,” in which the spec outlines how a person would use the product. For example, the spec might present a use case in this way: “The user enters the website and clicks on the red ‘Platform’ button, which links to a page containing the party’s platform in bullet points.”

Clear specifications ensure that both the party and the vendor or internal development team share an understanding of the project’s deliverables and timeline. Without a clear spec outline, the vendor might not be able to understand the party’s intentions, and both sides will waste time and resources.

# Using Tech to Target Voters

tech4parties.org/worksheets/using-tech-to-target-voters/

This worksheet will review specific ways in which technology can help a party target voters. For more information on general targeting, please see the Green European Foundation's *Campaign Handbook*: Targeting Voters and these Voter targeting exercises & worksheets.

Targeting is about focusing party resources on persuadable voters. A party does not need to target its own loyal base or another party's base, because those supporters have already made up their minds. Rather, a party should focus its resources on undecided voters. To prepare to target the correct audience, a party should answer the following questions.

Where do undecided voters live?

What are the basic demographics of the majority of undecided voters?

The party should then recognize the groups with which it will engage during the campaign. It must keep in mind that the total number of party supporters plus the targeted group(s) should be greater than the party's goal of total votes needed to win the election; not all targeted voters will vote for the party and some will not vote at all.

*(Party supporters + targeted voters) > Total number of votes needed to win*

### Geographic Targeting

How did the party's candidate (or a similar candidate) perform in recent elections? Identify precincts that had a high percentage of votes for the party (or a similar party) in previous elections:

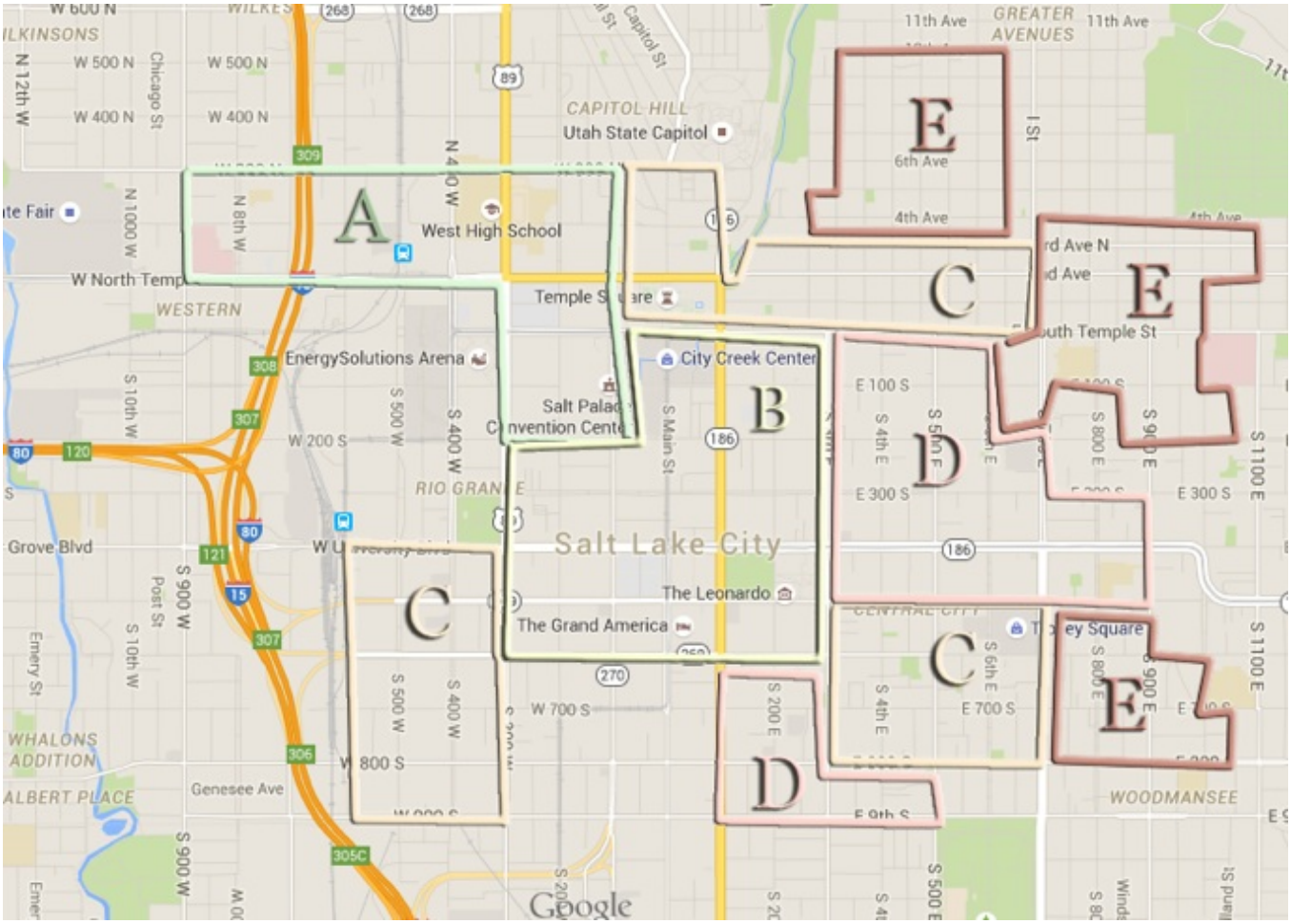
In the regions identified, what are the main channels through which populations communicate and receive information? For example, in the fictional rural region of Texmenia, public opinion found that most:

- 16-25 year olds communicate and get news on Facebook;
- 26-40 year olds communicate via email and get their news from the newspaper;
- 41-65 year olds communicate on the telephone and get their news from the television; and
- 65+ year olds communicate mostly in person, whether at community gatherings or social events, and get most of their information from the radio.

**Modes of Communication**

| **Age Groups** | Rural | Urban |
|---|---|---|
| 16-25 years old | | |
| 26-40 years old | | |
| 41-65 years old | | |
| 65 & older | | |

### Groups of Voters




Once a party identifies its supporters, it should work to identify the supporters or potential supporters who might actually go out to vote.

| | Likely Voter | Potential Voter | Non-Voter |
|---|---|---|---|
| **Likely Supporter** | Solidify support base | Focus on motivating to vote | Possible motivation effort (last priority) |
| **Potential Supporter** | Primary focus for persuasion | Secondary focus for persuasion | Ignore |
| **Unlikely to Support** | Possible communication (low priority) | Ignore | Ignore |

After identifying and choosing the target groups, a party must decide how to attract their attention and inspire their support. A party's message must be concise and interesting, letting voters know what the party plans to achieve for them if elected. A party should target specific demographics and use the communication channels that the previous activity identified in order to reach out to each targeted group.

| Communication Channel | Possible Tech Tools for Outreach | Non-Tech Related Outreach |
|---|---|---|
| Radio | • Interactive Voice Response tools | • Radio interviews and candidate Q&As |
| Social Media | • Online advertising<br>• Video engagement tool such as DemTools' "The Issues"<br>• Campaign social media presence - Facebook page, Twitter account, etc. | |
| Newspaper | • Online advertising on newspaper website | • Op-eds by candidate<br>• Advertising |
| TV | • TV ads<br>• Buying TV airtime for a "call-in" Q&A with the candidate | • Debates<br>• News stories about candidates |
| Mobile Phone | • SMS and SMS apps such as WhatsApp<br>• Mobile phone notification and survey platform like Voto Mobile | • Utilizing phones' FM receivers to pick up radio outreach |

To help form a concise message for outreach efforts, a party should ask:

What are the party's most important issues and why?

What will the party do to resolve these issues?

### Using Polling to Target Data

Good quantitative polling allows a party to identify targeted voters broadly – by age, gender, occupation and region. Using technology to conduct election analyses allows a party to consistently measure the support for each party and estimate the percentage of persuadable voters. A centralized database that party members can access is an essential tool for gathering, storing and sorting reliable, updated and consolidated voter information.

In a low-tech environment, a party can use card files or spreadsheets, which are explained in more detail in the database options in low-tech environments section. In a high-tech environment, a more sophisticated database allows a party to build a statistical model that selects individual voters for direct voter contact; this can help a party predict which voters are most likely to support a particular candidate or issue position. Applying that model to a database of eligible voters creates a particularly powerful tool for selecting which voters to contact. For more information, please see the database section.

While polling can help a political party develop strategies for targeting voters, among other things, it can cause more harm than good if conducted improperly. To ensure the validity of findings and analyses, an independent and properly qualified group should always conduct public opinion research. However, informal surveys can provide helpful feedback on party positions, though they lack the scientific validity of professionally-conducted research.

# Tech Firm Selection

tech4parties.org/worksheets/tech-firm-selection/

Choosing the right technology vendor(s) is absolutely vital to a project's success. A party needs to ask the following questions when choosing vendors for both short- and long-term projects.

### Expertise

Does the firm have the technical expertise to carry out a particular project? If the party seeks a long-term partner, do they have or can they acquire the skills needed for longer-term goals?

Has the firm worked on similar projects in the past, and if so, what were the results?

Is the firm doing the work in-house or farming part of it out to other firms? If so, what is the relevant expertise of those firms?

### Track Record

What is the company's reputation and how long have the principal technologists been in the field?

Has the vendor worked on projects of this scale and with projects at the same — or higher — level of security? Explain.

Yes No

What was the experience of the vendor's past clients or customers? Ask for references from former clients; a company's unwillingness to reveal names should be considered a warning sign.

### Political Considerations

Is the vendor working with other political groups or parties that may create a conflict of interest? If the vendor is working with other political parties or organizations, ensure that it has sufficient internal procedures to prevent the improper passing of information from one team to another.

Yes No

Do individuals within the company, particularly at a high level, have political relationships that the party needs to take into account? Explain.

Yes No

Does the vendor have a political past or a political identity that may cause a problem, such as individuals with a criminal past working at a high level? Explain.

Yes No

Is anyone on the vendor's staff working with other political groups or parties on his or her own personal time that the vendor is aware of? Explain.

Yes No

Is there potential for personal gain, understanding that nepotism and corruption can play a role in certain environments? Explain.

Yes No

Are there other potential conflicts of interest or political landmines? Explain.

Yes No

### Capacity

Does the vendor have the staff time available to work on a project of this scale? If not, can the company bring in subcontractors or temporary help, and if so, how will they be managed? Be sure to consider the project's security needs.

Yes No

Are there other projects in the vendor's pipeline that could cause delays in work on the party's priorities?

Yes No

### Longevity

Most projects will need to be maintained over time. Will this vendor be able to perform these tasks or is the company's long-term viability in doubt? If the vendor's longevity is in doubt, will other vendors be able to step in and take over maintenance tasks?

Yes No

### Bidding Process

Must the party follow a competitive bidding process for vendor selection? If so, what are the party's needs and budget?

Yes No

Are bids from vendors congruous with the party's needs and budget?

Yes No

Has the party received competitive bids from an appropriate number of vendors? If not, how can it solicit more bids?

Yes No

# Understanding the Tech Environment

tech4parties.org/worksheets/understanding-the-tech-environment/

While technology can assist political communication at almost every level, communication tools are only effective if the target audiences use them. From radio to email to mobile phones and social media, technology-enabled channels can help political parties distribute messages, mobilize supporters and persuade non-members. But the right people must be listening.

Which channels should a party use and how can it use them effectively? The answer varies and a party needs to understand its communications environment before embarking on a communications technology project. When deciding, a party should consider a number of factors.

- What communications tools are widely used? To communicate effectively, a party will need to leverage the communications channels that its target audience already uses.
- How widespread is internet access and use in the target region? Without the internet, most digital tools won't work, so a party must find out what channels people use instead.
- How does the target audience access the internet? If a party's audience is accessing the internet primarily on smartphones or handsets, the party should design its websites or other online communications channels accordingly.
- What are the social or geographic differences in the use of particular channels? In many places, internet usage will be much more common among educated urban citizens than with those in poorer rural communities. Youth, women and other marginalized groups may have limited access to the internet. Factors such as low literacy or disabilities may also prevent some people from using certain websites or from accessing the web at all.
- What are the cultural factors that influence political communications and are there certain types of messages that should not be delivered?
- Are there legal restrictions on the use of certain digital technologies? There can be legal limitations to targeting, for example.

To answer these questions, a party must do its research. It must talk to the people whom it wants to reach in order to determine which news sources they trust and which communications channels they use. It is important for a party to understand each of the different communications environments for its different audiences and how they are evolving. A clear comprehension of this essential background will help a party choose appropriate and effective technologies.

### Common Technology Environments

A party will likely encounter two basic technological environments when it comes to digital and online communications. However, in many countries where the population is heterogeneous, its communication strategy will need to accommodate both.

**High-tech environments:** Tech adoption is at or close to the level of Europe, Japan, the United States and other industrialized countries. The internet is universally available or nearly so, and broadband access is common, even in rural areas. Cell phones are ubiquitous and smart phones are in wide use. Well-funded parties in these environments can employ the latest tools and techniques in their outreach and communications most of the time. However, not everyone in the society will have the same level of technology adoption. In many industrial economies, rural, low-income and minority communities may not have access to fast internet connections, and older voters may not use cell phones (particularly smartphones) with the same facility as younger members of the electorate. The right technology will depend on the particular characteristics of the target audience.

**Low-tech environments:** Internet access is rare or nonexistent. Cell phones may be common, but smartphones are not. The most common form of personal digital communications is SMS text messaging and any digital communications plan will need to center around that most basic mobile technology. In these environments, radio may be the key broadcast medium, facilitated by the FM receivers built into many cell phones.

Various populations' access to and willingness to work with technology may differ within each environment. Many countries have an urban and/or educated elite whose internet adoption rates and usage patterns are similar to those in Europe and the United States, while other communities in the same countries – including urban poor and residents of rural areas – may live in a starkly low-tech environment. In these circumstances, parties will likely adopt a mixed strategy, using Facebook, email and other online channels to connect with internet users, and mobile phones/SMS to connect with people who do not regularly access the internet.

# Toolbox | NDI

tech4parties.org/toolbox/

**Toolbox**

The toolbox outlines basic tools that can help parties achieve their goals. These tools are not right for all parties and they are to be used for different purposes, including outreach, communication, and internal organization. Deciding if a tool is right for a party requires analysis and a thorough understanding of a party's environment, available finances and human resources. Without the right resources, and utilized in the wrong context, these tools may not have their desired outcome and may cost more than the party originally planned.

## Website

A website remains the hub of a party's online presence by persuading, recruiting and organizing party supporters. The party can choose between open-source and proprietary Content Management Systems (CMSs) to store and organize the site's content.

## Constituent Management

A centrally located and standardized list of supporters can help a party securely target them. Constituent Relations Management (CRM) software tracks supporters and provides data that allows the party to target specific membership segments.

## Email

Email is a flexible tool that maintains a high response rate among supporters. Email can support party fundraising efforts, recruit members, mobilize supporters and more. Having supporters provide an email address allows a party to expand its member database.

## Social Media

Social media platforms such as Facebook enable supporters to spread a party's message, can serve as hubs and may empower citizens to hold their governments accountable. But social media does not target all supporters and online supporters might hesitate to take action offline into the physical world.

## Mobile & Smart Phones

A party can use SMS messaging and mobile phone voice features to connect with, mobilize and poll supporters. If smartphones are common among party members, the party can develop an app to push information to and receive feedback from members.

## Radio

In some countries, radio is the best or only means of broadcasting to political audiences. Beyond the traditional radio receiver to hear messages, a party can use radio to reach supporters' mobile phones, which are equipped with FM receivers and it can use digital Interactive Voice Response (IVR) to record and upload audio policy information.

## Online Advertising

In some countries, through channels such as Google, Facebook and YouTube, a party can use cookie-based advertising to direct ads to target demographics online. The party can create a custom audience and, through both cookies and social media behavior, target and advertise to current and potential supporters.

## Short Message Service (SMS)

SMS allows users to send short messages between mobile phones and has become a common tool in low-tech environments. Before incorporating SMS, a party must consider the cost and availability of mobile phones, the presence of an SMS app, and user demographics.

## Office Applications

Simple office technologies like word processors, spreadsheets and presentations are available commercially (e.g., Microsoft Office) and for free (e.g., Google Docs). Free applications like Google Docs operate on the cloud, which sacrifices some functionality for simplicity and the ability to collaborate.

# Websites | NDI

tech4parties.org/toolbox/websites/

**Websites**

Despite the rise of social media, a website can still serve as the hub of a party's online presence. A website is typically both a persuasion tool and a recruiting office; it is a place for the party to employ text, images and videos to make its case in as compelling a way as possible. It will typically suggest avenues for potential supporters to get involved — for example, by signing petitions, joining an email list, signing up to receive party messages via SMS, following the party on social media channels or volunteering to help with party activities. A record of who has signed a petition or elected to receive other communications should link to the party's constituent management database. A good website makes it as easy as possible for potential supporters to become actual ones, and most of the party's online outreach should refer people back to the website to capture their enthusiasm when it is at its height.


Modern websites typically run on content management system (CMS) software packages, which support the collection, management and publishing of content on a webpage. Many CMS packages can be purchased, but parties can also take advantage of excellent open-source options such as Drupal and WordPress. One key factor to consider is ease of use, since staff and/or volunteers must be able to update the website quickly and without much training.

Parties can also create special-purpose websites around particular campaigns and initiatives, including sites that allow users to upload content or access data. For example, women's or youth wings may want to have a separate website, distinct from the rest of the party, that promotes their policies and agenda. For instance, the Conservative Women's Organization, the women's wing of the Conservative party in the United Kingdom, has a website separate from that of the general Conservative Party. The website allows the women's wing to promote its policies, fundraise and gain support, and serves as an independent platform for members of the wing to discuss issues important to them. The website includes:

# Constituent Management

tech4parties.org /toolbox/constituent-management/

The oldest political technology is probably a list: who's with us who's against us, and who can we persuade. In the digital age, spreadsheets and databases expand a paper list's capabilities, but the essential goals haven't changed much: political lists are about knowing who to communicate with and how to reach them.


Many political organizations today rely on basic office applications like email contact lists, Excel or Access (and their open source counterparts) to manage their supporter lists. Unfortunately, having separate documents stored on different computers can create serious problems of keeping track of who's on what list. Having a central, standard copy of a list — stored on a local network or on a cloud application like Google Docs — helps avoid duplication and lost data, though of course that document must be both backed up and protected from prying eyes.

Depending on its technological base, a party can also take advantage of software designed specifically to manage contacts on a large scale and facilitate communications *en masse*. Constituent Relations Management (CRM) software packages help parties keep track of members and supporters (and in some countries, voters who are not supporters). Typically, they also incorporate mass-messaging capabilities, usually using email or SMS but sometimes also including social media.

CRMs have become an essential tool for parties, campaigns and NGOs in the United States, where several such packages are available for organizations to use. CRMs are typically employed to send messages to supporters in bulk, including fundraising appeals, event invitations, requests to sign online petitions and take other online actions, and of course appeals for supporters to vote in elections.

CRM software typically compiles information about supporters as they interact with messages sent through the system. For instance, a CRM will often record which emails a particular person has opened, which links they have clicked in the messages and which online actions they've taken. This data can also be cross-referenced with other information like the person's location or the demographic information (age, sex) known about them. As discussed below, parties can use this kind of data to target their communications with particular segments of their followers.

CRM systems aren't widely available commercially in every country and language, but NDI has developed a version of the open-source CiviCRM platform called CiviParty. This tool can help parties organize contacts and events, send out surveys to supporters through SMS, reach large audiences via email blast or printed mail merge, and track supporter engagement.

CRM software typically allows users to identify and target different segments of their list(s). Criteria often include a supporter's geographic location, demographic characteristics and past online actions. A party might choose to target:

- A particular set of emails or SMS messages to supporters in a given province;
- Male followers with one set of messages and female followers with another; and
- Different groups of voters based on the particular online actions they taken in the past.

Another type of list segmentation is A/B testing, where the CRM system splits a list into randomly generated segments. Party staff then send different messages to the segments and measure the responses. Parties might use A/B testing to identify their most compelling messages or messengers; for instance, it might test different themes, wording or featured party officials on segments of its list before sending the most successful variant to the full list.

# Email | NDI

tech4parties.org/toolbox/217-2/

**Email**

Although it is one of the oldest online communication channels, email remains a cornerstone tool for political parties and campaigns. Relative to other digital options, email tends to have a higher response rate from recipients; emailing people a request that they take a particular action will often yield ten times more responses than a Facebook post targeting an equal number of people. One reason for email's utility is that it blends some of the comparative advantages of other communications mediums, such as the microtargeting of a direct mailer, with the low cost of social media.

Similarly, email can support a variety of campaign functions, including fundraising, volunteer recruitment and mobilization, internal and external communications, and public opinion research, and it can be easily incorporated across other digital platforms. Many of the best campaign websites maximize conversion by integrating numerous opportunities for action, many of which require visitors to provide an email address, immediately expanding a supporter or volunteer database. Furthermore, many people expect to take an action when using email, meaning they could be more likely to donate money, volunteer or sign up for an event.

Additionally, email's accessibility provides citizens with a platform to engage their elected officials and hold government accountable. Most government officials and offices share their email addresses publicly, allowing citizens to communicate their concerns, seek clarifications or demand action. If citizens feel that their voices are not being heard, email provides a convenient platform for them to organize and mobilize like-minded activists, or to share information with a listserv.

Parties and campaigns rarely function within the exact same context, so they must perform adequate analysis and planning prior to implementing new tech tools; however, there are some general best practices to help campaigns improve their email outreach. For more, check out Wellstone's Tips for Email Organizing and the New Organizing Institute's 10 Tips for Effective Emails.

# Social Media | NDI

tech4parties.org/toolbox/social-media/

**Social Media**

In most countries, Facebook has almost completely supplanted other online social networks and is frequently used by a large segment of the population, particularly the educated urban population. Facebook's strength as a political tool is the personal tone of its messages: if armed with the right information and imagery, a party's supporters can make the party's case on its behalf by posting political messages that may persuade friends and family.


In some cases, a Facebook page can replace a political organization's website, serving as the hub of its online outreach efforts. It is important to remember, however, that in this case, communications will be limited to people who use Facebook. Plus, the party or organization will be limited by Facebook's own constraints on how content can be displayed and archived.

Political parties face other obstacles when using Facebook as a political tool: for one thing, Facebook does not show all of the content a party posts to its followers. Instead, the social network's underlying software displays a selection of recent content in users' "newsfeeds," based on what it determines to be "relevant" to those users, though parties and other content publishers can pay to "boost" content and have it seen by more people. Another common problem can be getting people to take action outside of Facebook: it is relatively easy to persuade people to "like," "share" or comment on Facebook posts, but many users resist leaving the site to take other action.

Other social networks such as Twitter, Pinterest and Google Plus may be useful for some political parties, depending on local adoption rates and customs. In many countries, for instance, Twitter is used by a small minority of the population, but those users tend to be journalists, bloggers, activists and other influential people in political society. In that case, parties will likely want to be active on Twitter to reach and persuade its users, because their potential power far outweighs their actual numbers.

Another consideration is that the bulk of traffic to social media sites in many countries comes from mobile phones. A strategy to distribute information via social channels may also turn out to be a mobile strategy. In fact, some political groups organizing among low-income minority communities in the United States have encouraged the use of Twitter as an organizing tool, since it was designed from the start to be used on mobile devices. During the recent protests against racism in Ferguson, Missouri in the United States, organizers used social media to communicate protest plans and announcements.[1] Similarly, although observers may assume that residents of low-income neighborhoods use social media less frequently, an analysis of data in Baltimore, Maryland, also in the U.S., showed similar social media habits across all income levels and neighborhoods.[2]

Social media's accessibility doesn't just benefit parties. These digital platforms have also helped empower citizens, who use them to hold elected officials accountable to their campaign promises and to provide feedback on their tenures in government. Our case study on Mexico's PAN party shows one example of Twitter's usefulness as a feedback platform. Similarly, the platform Reddit has grown in popularity, and in turn, has seen its stock rise within the political sphere. The Podemos Party in Spain used Reddit as the basis for its Plaza Podemos online debate platform, and some elected officials have even taken to participating in Reddit's public "Ask Me Anything" forums, including U.S. President Obama in 2012.

[1] Joshua Tucker, "Tweeting Ferguson: How Social Media Can (And Cannot) Facilitate Protest," Washington Post, November 25, 2014, accessed May 26, 2015, http://www.washingtonpost.com/blogs/monkey-cage/wp/2014/11/25/tweeting-ferguson-how-social-media-can-and-can-not-facilitate-protest/.

[2] Chris Bernard, "Twitter in the Charm City," Idealware, November 8, 2012, accessed May 26, 2015, http://www.idealware.org/blog/twitter-charm-city.

# Mobile & Smartphones

tech4parties.org/toolbox/mobile-smartphones/

Mobile phones have become a truly ubiquitous global technology, revolutionizing economic and social lives in profound ways. Particularly in low-tech environments, mobile phones may be the only digital channel parties can employ successfully to reach a large number of voters.

A mobile communications program typically emphasizes SMS messages to supporters, using them to deliver political talking points, invitations to rallies and other events, and even creating lists of local voters or activists to contact. Parties can also solicit information from supporters via SMS — asking them to vote on party priorities via SMS reply.

Parties can also take advantage of voice features, depending on local conditions (in many countries, voice calls are relatively expensive but text messages are cheap). Parties might hold “virtual town halls” to connect officials with voters or set up conference calls with many supporters at once to rally people before an election or to distribute Get Out The Vote plans and instructions.

In some cases, parties may use automated Interactive Voice Response (IVR) systems to poll members or acquire demographic or other information about them. IVR systems ask people to interact remotely with a computer via touch tones or voice commands (“say or press 2 if national security is your highest priority”), allowing an organization to gather information from many people at once. Combining these various phone features can create a rich experience for supporters: participants who listen to a tele-town hall meeting or a speech delivered via voice call could then receive a text message that asks them to volunteer or take a poll. People who replied to the text would then be called by an IVR system that prompts them to supply information immediately and digitally. This case study explores how Cambodian political parties established an IVR system to make party information more accessible to voters.

Finally, in areas where smartphones are common, parties could consider creating custom apps to facilitate communications with supporters. These can push information out to party members, but they can also function the other way, allowing party members to vote on initiatives, participate in virtual chats with party leaders and submit reports on conditions in the field. Apps are only useful if people adopt them however, and a party will usually need to launch an educational/promotional campaign to encourage its users to install an app and use it regularly.

Most smartphones also contain built-in FM radio chips that allow the phones to receive FM radio broadcasts. Although many large cell phone companies have disabled this feature, FM radio is a free alternative to streaming radio and FM radio listeners can receive important information even when cell phone carrier networks are overloaded or down. If smartphone-equipped voters have access to this built-in feature, then political parties can use the radio to reach out to non-member voters, non-member supporters and party members alike.

Grassroots outreach is often most effective when candidates meet directly with voters; however, as voter contact goals increase – especially on regional, national or larger campaigns – candidates cannot be in every constituency at once, nor can they meet every individual voter. Moreover, it would be inefficient and far too expensive in terms of capital and human resources.

Videos of candidates are one effective way for campaigns to deliver their message to voters. However, when candidates and parties are campaigning in rural constituencies or other areas without TV reception, they must be creative to in getting the video to voters. Some options include:

- Tablets: Equip canvassers with tablets that have videos in lieu of, or in addition to, traditional campaign literature; and
- Mobile screens: Load a vehicle with a big screen, projector, sound system and generator, and then send the activists from town to town or village to village. They can unload, set up and play the video in a common area for all to see.

# Radio | NDI

tech4parties.org/toolbox/radio/

**Radio**

Though it is the oldest of the modern mass communications media, radio remains effective at connecting with political audiences in many countries; in some areas, radio may be the only broadcast outlet available. Reaching anyone in range with a receiver, radio is useful for broadcasting news, speeches, persuasive messaging, Get Out the Vote messages and much more. And despite its age, radio is now in the process of a technological transformation.

Many mobile phones contain FM receivers, extending radio's reach into people's pockets wherever they are. Plus, many radio stations stream their content online, allowing people to follow them from around the world — potentially very useful for political parties in countries with a politically engaged diaspora.

New technologies combine radio with digital and cellular communication channels in other innovative ways. The application Freedom Fone lets people communicate between cell phones by sharing messages through Interactive Voice Response (IVR), voicemail and SMS. For example, political parties could use Freedom Fone to record and upload policy information, allowing supporters to call the IVR system and listen to the audio files. The U.S. Broadcast Board of Governors (the parent of Voice of America and many other radio channels) posts audio and video clips online via its BBGDirect program, where any broadcaster can download and use them in its own programming. Far from killing radio, online technologies have given it new life, new reach and (potentially) new voices.

# Online Advertising

tech4parties.org/toolbox/online-advertising/


Depending on local laws and customs, parties may employ online advertising to spread their messages and recruit new supporters. Potential ad options include Google search ads, ads on Facebook and other social media channels, video ads on sites like YouTube, and display ("banner") ads on content websites such as news, sports and entertainment sites.

Online ads are usually highly targetable. Site-specific ads reach the demographic groups that frequent those sites; for example, ads on a sports website will traditionally appear in front of men, while financial news sites will generally reach upper-income, urban populations. In some countries, ads can be targeted even more specifically, using web browser "cookies" to identify voters individually across a broad range of websites, if the laws allow it. In the U.S., cookie-targeting has become a popular tool to direct ads at particular demographics and/or at people living in specific political districts. In the European Union, though, privacy laws effectively ban cookie-targeting, though a small fraction of the population has opted into the practice.

Social media ads can also be targeted. Facebook advertisers, for instance, can aim content based on users' demographic characteristics, location, interests and past behavior on the site. Crucially, advertisers can also upload a list of email addresses to Facebook to create a "custom audience," which they can then target with ads. For instance, a party might create a custom audience of its own supporters and then use it to hit them with Get Out the Vote ads right before an election.

Once they've created a custom audience, party staff could try Facebook's "look-alike" targeting feature, which anonymously identifies other Facebook users — across a broad range of demographic and behavioral factors — similar to those in the custom audience. Ads can then be displayed to the "look-alike" targets, who in this case are people similar to the party's existing supporters, under the assumption that they're likely to be supporters-in-waiting. Look-alike targeting has proven a useful tool for political groups and campaigns in many countries.

Other online advertising channels have their own unique targeting capabilities, and parties should investigate them carefully if they're considering employing online ads to reach new or existing supporters.

Most Facebook ads are also functionally mobile ads, since so much of the site's traffic comes from cell phones. Other forms of mobile advertising, for instance search ads or ads on mobile content websites, may also provide a useful channel for persuasion, recruiting and GOTV. Mobile ads will typically link to a web page that echoes the message from the ad.

In the United States, Terry McAuliffe, the 2013 Democratic candidate for governor of Virginia, prioritized advertising through Google as part of his campaign's overall digital strategy. With the help of digital media marketing firm Bully Pulpit Interactive, the McAuliffe campaign ran only the most effective ads through Google Search, starting almost a year ahead of election day. The campaign targeted key audiences by designing ads that appealed to specific demographics, such as African Americans, women, and youth. Google's ability to reach different platforms, including both mobile and desktop web and video searches, allowed the McAuliffe campaign to know exactly which group each ad targeted. For example, the campaign ran youth-oriented ads ahead of certain videos on YouTube. Although the campaign headed into election day with a lead against opponent Ken Cuccinelli, it never tempered its digital effort. In fact, it ran search ads directing searches for "polling place" to the McAuliffe campaign website's polling place lookup tool.

In the end, the McAuliffe campaign's digital-to-TV spending ratio was five times higher than Cuccinelli's. McAuliffe's digital marketing push might have given him the advantage over Cuccinelli in what turned out to be a narrow victory. This example demonstrates the value of targeted digital advertising for political parties and campaigns compared to TV advertising, especially in expensive media markets. Like the McAuliffe campaign, other campaigns can use targeted digital search ads to persuade key audiences and turn out voters as part of the GOTV effort.

# Short Message Service (SMS)

tech4parties.org/toolbox/short-message-service-sms/

Short Message Service, or SMS, protocols allow users to communicate by sending short messages (generally of 160 characters or fewer) between mobile phones. SMS outreach and organizing capabilities are improving quickly as mobile phone usage rises, especially in rural or low-tech environments, and it is proving to be an effective tool for engaging youth. A party or campaign should be sure to keep these important points in mind when planning to incorporate SMS in its campaigning:


- What is the cost and availability of mobile phones?
- Is there an SMS application that could be used, such as WhatsApp?
- What are the demographics of mobile and smart-phone users?

After assessing these baseline considerations, a party or campaign should not shy away from innovative uses of SMS messaging. For example:

- India's Aam Aadmi Party made WhatsApp a central tool for mobilizing volunteers prior to the party's 2013 and 2015 municipal election victories in Delhi;
- In the United States, Democratic Party organizers saw a noted increase in completed volunteer shifts in the 2013 Virginia governor's election after adding SMS volunteer shift reminder/confirmation messages, in addition to their standard phone calls; and
- The ORCA project, implemented by United States Republican candidate Mitt Romney's 2012 campaign, used SMS messaging for real-time voter turnout reports.

As with any other ICT solution, and especially with newer or untested technology, it is important to conduct periodic assessments of SMS messaging's impact and effectiveness to ensure that valuable campaign resources are not misallocated.

# Office Applications

tech4parties.org/toolbox/office-applications/

For some parties and organizations, even simple office technologies like spreadsheets and word processors can be transformative. The Microsoft Office suite is standard in most companies and government offices in the industrialized world, but parties unable or unwilling to pay for the Office licenses can now take advantage of several free and/or open source options, such as the Open Office suite and Google Docs. Office applications include word processors, spreadsheets, and presentation programs.

- Basic word processor programs can be used to make legal copies, as well as to write memos, reference documents, and letters on letterhead.
- Spreadsheet programs can help party staff organize, analyze and store data in tabular form. They can perform basic arithmetic and mathematical functions, and can express information in various ways including text, numerals or graphical form.
- Presentation programs display information in the form of a slide show. With these types of programs, party staff can write, edit and format text for the presentation, insert and manipulate graphic images, and view the presentation as a full screen slideshow.

Cloud applications like Google Docs may be attractive to parties as well. They have similar functions as basic office applications but also allow people in different locations to collaborate on a single document. The collaborators must have a decent internet connection, as the documents, spreadsheets and presentations are “live” online. Like other cloud applications, this makes cloud documents vulnerable to any loss of internet access; if the network goes down or the internet connection goes dark, staff cannot access the documents unless they’ve saved a local copy. And, since these are online documents that can be accessed from anywhere, they’re vulnerable to anyone who obtains the correct login credentials.

While Google Docs and many other cloud applications do not support all the advanced features that can be found in a suite such as Microsoft Office, they do tend to offer most of the basic, popular features. As these programs tend to focus more toward informal, internal use, printing quality can be compromised. Additionally, these cloud programs are sometimes slow compared to traditional computer software programs. Even where there is a strong internet signal, they can seem slow to respond and may lag behind what is being typed. That being said, many people find their capacity to allow many people to simultaneously edit a single document, as well as to have important documents available at any internet-connected computer, more useful than that of traditional non-cloud office applications.

# Case Studies | NDI

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**Case Studies**

## U.S. President Obama's 2012 Campaign

In 2012, the two major U.S. presidential campaigns developed new tech tools to boost their chances of victory. On election night, one campaign celebrated its tools' impact, while the other was left wondering what went wrong.

## Italy's Five Star Movement

The upstart Five Star Movement in Italy organized online and held online primary elections to select candidates who promoted the party's populist agenda.

## Net Parties – German Pirate Party & "The Net Party" in Argentina

Responding to what they considered "crises of representation," the German Pirate Party and Argentina's Net Party turned to online platforms in order to increase citizen engagement in the policy development process.

## Denmark's Liberal Alliance – Blockchain Secure Online Voting

The Danish Liberal Alliance used Bitcoin's blockchain protocols to support a secure and transparent e-voting platform for internal democracy.

## South Africa's MyANC Mobile App

Recognizing the growing role that smartphones are playing in South African society, the African National Congress developed a mobile phone application that shares information about party structure, policies and elections. Supporters can comment on items, which provides feedback to party leaders.

## Mexico's PAN Party – Twitter Contest

To highlight the party's achievements while in government, Mexico's National Action Party unexpectedly learned how Twitter can facilitate voter feedback and insight into public opinion.

## Cambodia's CNRP – IVR/Social Media

Although rural terrain and state-run media can make outreach difficult, the Cambodian National Rescue Party took advantage of interactive voice response technology and social media platforms like Facebook to communicate its message to voters.

## EGP – Online Primary to Increase Participation, Fails to Connect

The European Green Party thought that using an online primary would drum up support ahead of the 2014 European Parliament elections. Although its rollout was smooth, a lack of accompanying contextual analyses and strategic planning prevented the primary from being successful.

## Moldova – Social Canvass by GQR Digital

A coalition of three pro-European Union parties won the 2014 elections, but the Liberal Democratic Party's ability to conduct microtargeted outreach on social media helped them win the most votes.

## Spain's Podemos

The left-wing Spanish upstart party Podemos used online platforms to be more responsive to voters' interests, and it paid off during the 2014 European Parliament elections and heading into the 2015 general election.

## New Zealand's Green Party – Crowdsourcing Question Time on Social Media

The New Zealand Green Party introduced an initiative that used social media to crowdsource questions about climate change to be asked at Question Time. Once all of the questions were compiled, the party chose ten and opened an online poll asking citizens which ones were most important to them.

# ORCA vs. Narwhal in the 2012 US Presidential Race

tech4parties.org/case-studies/orca-vs-narwhal-in-the-2012-us-presidential-race/

The 2012 U.S. presidential election provides two distinct examples of campaign technology innovation. One demonstrates the benefit of effective and strategic planning, while the second shows the pitfalls of an over-hyped technology.

During the campaign period, both the Democratic and the Republican candidates developed new tools. Project Narwhal, President Barack Obama's re-election campaign's attempt at a real-time full data integration system, was largely hailed as a revolutionary success, while Project ORCA, Republican presidential candidate Mitt Romney's campaign's vaunted get-out-the vote application, proved to be troublesome.[1]

During the 2008 elections, Barack Obama's campaign staff recognized that they collected significant amounts of voter information in their field, finance and other departments, but lacked a central depository where the information could be stored, shared and accessed by staff and volunteers. To fix this shortcoming, the 2012 campaign created Project Narwhal, a consolidated central database that could help microtarget persuadable voters.[2] With detailed voter information records available to campaign staff and volunteers, the Democrats gained a competitive advantage by targeting messages and resources toward persuadable voters' specific interests. The Obama campaign's strategic ability to use Narwhal as the backbone of a system to enhance voter contact through data centralization, systems integration, and microtargeted messaging proved significant during the campaign period.

While Narwhal was in development, Mitt Romney's campaign was hard at work on Project ORCA, a web-based application for volunteers that campaign officials felt would turn out all supportive voters in key states.[3] Fundamentally different from Narwhal, ORCA was developed as a poll-monitoring web-based application.[4] ORCA would allow Romney campaign volunteers to report polling-place turnout data in real time, helping strategists track and redirect Get Out the Vote resources efficiently to underperforming districts. Instead, technical problems such as volunteers' difficulties accessing the correct URL, a broken password reset tool, and eventual system-wide crashes, as well as a poor volunteer training regimen, hampered reliable access to ORCA.[5] As the dust settled on election day, rather than increasing the efficiency of turnout operations, ORCA proved to be an ineffective use of campaign resources and a frustrating distraction.

Although both campaigns dedicated resources to developing new campaign technology, the 2012 U.S. presidential election exemplifies the varying influences of innovations in campaign technology. President Obama's campaign benefited from the development and implementation of Project Narwhal because officials understood its propensity as a force multiplier for face-to-face voter contact, and because they allocated the requisite amount of resources and human capital ahead of time in order to test the system.[6] The Democrats succeeded with Narwhal because it connected well with the campaign's strategic objectives of tailoring its message to those voters who would be most likely to connect with it.

Meanwhile, the Republicans felt they had enough electoral support and they simply needed to focus on turnout. However, the Romney campaign's election day travails reflected overconfidence in an unprepared system. ORCA, designed as a GOTV aid to facilitate instant communication between volunteers and campaign staff, had neither the capacity to handle volunteer demand on election day nor the trained staff to compensate. Hamstrung by technical and operational hiccups, campaign officials' confidence in ORCA's ability to influence results proved a strategic miscalculation.

ORCA provides a cautionary example for political parties. New technology does not in itself guarantee victory; effective technology strategy requires integration with established campaign tactics, and successful implementation necessitates adequate resource allocation for testing and training.

- Technology, implemented poorly, creates problems rather than solutions;
- Narwhal maximized the Obama campaign's data management system, allowing workers to improve contact with voters;
- The lackluster strategic planning process ahead of ORCA's implementation — particularly campaign officials' failure to appropriately stress-test the system — severely limited the technology's election day impact.

[1] "How Romney's ORCA was Defeated by Obama's Narwhal & Dreamcatcher," Daily Kos, November 10, 2012, accessed November 25, 2014, http://www.dailykos.com/story/2012/11/10/1160145/-How-Romney-s-ORCA-was-defeated-by-Obama-s-Narwhal-Dreamcatcher#.

[2] Richard Stallman, "Did Hipster Tech Really Save the Obama Campaign?" Wired, June 4, 2013, accessed November 25, 2014, http://www.wired.com/2013/06/did-hipster-technology-really-save-the-obama-campaign/.

[3] Alexis C. Madrigal, "When the Nerds Go Marching In," The Atlantic, November 16, 2012, accessed November 25,2014, http://www.theatlantic.com/technology/archive/2012/11/when-the-nerds-go-marching-in/265325/.

[4] Ibid.

[5] Stephanie Marcus, “Mitt Romney’s Project ORCA Failure: Broken ORCA App Cost Him Thousands of Votes,” Huffington Post, November 10, 2012, accessed November 25, 2014, http://www.huffingtonpost.com/2012/11/10/mitt-romney-project-orca-broken-app-cost-thousands-votes_n_2109986.html.

[6] “Did Hipster Tech Really Save the Obama Campaign?”

# Moving Away from Traditional Party Politics: Italy's Five Star Movement

tech4parties.org/case-studies/moving-away-from-traditional-party-politics-italys-five-star-movement/


In response to economic pressure, government gridlock, and recent scandals, Italian voters have become increasingly dissatisfied with their political establishment in recent years, as exhibited by lower voter turnout, decreased political party membership, and a decline in political activism. Voters have begun to look past traditional parties for new groups that will represent their interests in government. One such group is the Five Star Movement (M5S), a populist party led by Beppe Grillo that aims to devolve responsibility for decision making from government to citizens; however, while the party effectively identifies underrepresented citizen interests, it lacks the resources and structures of traditional Italian political parties.[1]

M5S has dedicated itself to increasing citizen participation through direct democratic means, keeping the price of participation low. As a result, M5S organizes extensively online and holds online primary elections so all voters with internet access can participate, thereby increasing accessibility and improving the party's responsiveness.

As a new political party in a country whose population has been losing interest in politics, M5S faced political and financial hurdles. Maximizing limited resources, Beppe Grillo and M5S identified online organizing as an effective approach to connect with and engage activists and voters, without needing a regional committee structure or large amounts of funding. Moreover, organizing online made it easier for voters to participate within the party. One important tool M5S used for online organizing was Meetup groups, which allowed supporters to find and connect with like-minded individuals online, and then organize local meeting groups or organize for local elections.[2] These Meetups formed the backbone of the organization by empowering local Meetup organizers to be activists.

The M5S blog serves as the party's online headquarters and main platform for sharing party news and updates. The party uses web-based direct democracy and online organizing tools to provide an economical and accessible platform for the party to communicate with and engage supporters. Its online presence has allowed M5S to cut traditional expenses — such as large national and sub-national committee structures — in favor of cheaper online organizing, while also making it easier for citizens to participate in Italian politics. Heading into the 2013 Italian Parliamentary elections, M5S took full advantage of its online structure by holding an online primary election, the first in Italian history.[3][4] Voting was open online for three days in early December 2012 through the campaign's main website. Only a small number of party members were eligible and had registered to vote in the primary — voters needed to upload identification documentation online ahead of the election — but they could vote from anywhere with internet access. Over 1,400 candidates declared for the 945 available seats, and each candidate received a personal page on the party's website where they could post their campaign information for voters.[5] Voters could cast up to three votes.[6] However, despite M5S having over 200,000 members, only slightly more than 31,000 registered to vote and fewer than 21,000 members actually voted.[7] In comparison, 3.1 million voters — around 30 percent of the coalition's total support in the 2013 general election — participated in an open primary held by the center-left coalition Italy, Common Good in November and December 2012 to select their candidate for prime minister.

Although turnout for M5S's December 2012 online primary was low, the party's innovative use of technology to encourage engagement and intra-party participation paid off during the 2013 parliamentary election, when M5S won 25 percent of the vote nationally, becoming Italy's most powerful opposition group.[8]

M5S advocates in favor of direct democracy for both Italy and Europe, criticizes establishment politicians and parties for government gridlock and alleged cronyism, and claims its direct democratic procedures are more transparent than parties' traditional methods. However, Beppe Grillo maintains significant individual control over the party. Interested candidates for parliament on the M5S ticket must meet strict candidacy restrictions. Moreover, holding elections over the internet is not without potential technical pitfalls or information security risks. M5S members interested in participating in the 2012 elections first had to submit identification documents for verification through the website, a potentially daunting first step.[9] Furthermore, voting was conducted through the party's website without third-party monitoring, meaning the voting process was conducted with limited transparency and extensive trust that results would not be tampered by outside influences.

While M5S worked to create policies and agree on intra-party procedures through online polling, once in Parliament, the party began to splinter, and MPs who veered away from the party were punished by Grillo, in direct defiance of M5S's established procedures and norms.[10]

M5S focuses heavily on using technology to engage voters and increase the accessibility of party functions such as primary voting and policy development. This approach to direct democracy has helped the party grow its membership and electoral support, despite limited resources. Moreover, M5S's meteoric rise in electoral support demonstrates that political parties can use innovative approaches to ICTs and online organizing to better engage with voters on issues that affect them.

- Online organizing allows start-up political parties and campaigns to organize with a more flexible structure than established parties;
- Responsive parties can use online organizing and ICTs to disseminate their messages directly to the supporters they need to mobilize.

[1] Lorenzo Del Savio and Matteo Mameli, “Anti-representative Democracy: How to Understand the Five Star Movement,” Open Democracy, July 4, 2014, accessed Arpil 23, 2015, https://www.opendemocracy.net/can-europe-make-it/lorenzo-del-savio-matteo-mameli/antirepresentative-democracy-how-to-understand-fi.

[2] Jamie Bartlett, “How Beppe Grillo’s Social Media Politics Took Italy by Storm,” The Guardian, February 26, 2013, accessed November 25, 2014, http://www.theguardian.com/commentisfree/2013/feb/26/beppe-grillo-politics-social-media-italy.

[3] Alan Johnston, “Italy’s Five Star protest party makes waves,” BBC News, December 7, 2012, accessed July 28, 2015,

[4] Maria Lanzone, “The ‘Parlamentarie’ of 5 Stars Movement: a new instrument of (online) participation?” ECPR General Conference, September 2013, accessed June 1, 2015, http://www.ecpr.eu/Filestore/PaperProposal/146cd107-fcc0-4b07-8b03-d26348249be5.pdf.

[5] Maria Elisabetta Lanzone and Stefano Rombi, “Who did Participate in the Online Elections of the Five Star Movement (M5S) in Italy?, Causes, Features, and Effects of the Selection Process,” The Open Journal of Sociopolitical Studies, March 15, 2014, accessed November 25, 2014, http://www.academia.edu/6412961/WHO_DID_PARTICIPATE_IN_THE_ONLINE_PRIMARY_ELECTIONS_OF_THE_FIVE_STAR_MOVEMENT_M5S_IN_ITALY_Causes_Features_and_Effects_of_the_Selection_Process_with_Stefano_Rombi_in_Participation_and_Conflict, 175.

[6] Ibid, 175.

[7] Ibid, 175.

[8] “Italy’s Five Star Movement: Falling Star,” The Economist, December 9, 2014, accessed November 25, 2014, http://www.economist.com/news/europe/21635792-beppe-grillo-says-he-tired-and-his-movement-tired-his-autocratic-leadership-falling-star.

[9] Lanzone and Rombi, 175.

[10] “Italy’s Five Star Movement: Falling Star.”

# Net Parties - German Pirate Party & ``The Net Party`` in Argentina

tech4parties.org/case-studies/net-parties-german-pirate-party-the-net-party-in-argentina/

A direct democratic system allows individual citizens to vote directly on legislation, rather than electing a representative or delegate to govern on their behalf. Two political parties — the Buenos Aires Net Party in Argentina and the German Pirate Party — identified an area where web-based direct democracy platforms could impact political parties and systems by bringing supporters directly into the policy development process. Frustrated with government gridlock and a lack of transparency, these parties believe that involving voters directly in government can lead to increased citizen participation, transparency and accountability. As Pia Mancini, a founder of the Net Party, said, "We believe that democracy is not just a matter of stacking up preferences, one on top of each other, but that our healthy and robust public debate should be, once again, one of its fundamental values."

Both parties believe that the internet provides a unique medium to do precisely that. The Buenos Aires Net Party programmed its own software, DemocracyOS; the German Pirate Party operated online through chat rooms and discussions on collaborative document-sharing software called PiratePads, an open-source software similar to Google Documents. Since the pads were online, users were connected with members from Pirate Parties across Europe.

The Buenos Aires Net Party was created after its leaders identified a "crisis of representation" in the city government. [1] The party sought to use the internet and technology to increase civic engagement and transparency and mitigate the crisis. Party members designed and developed DemocracyOS, an open-source, vote-and-debate software.[2] Synchronized with legislation being debated or voted on by the Buenos Aires City Legislature, party members could comment on and discuss the policy proposals and then vote for, against or abstain.[3] Should a Net Party candidate be elected to office, they pledge to vote in line with the results of DemocracyOS polls.[4] Although DemocracyOS demonstrates an innovative approach to direct democracy and citizen engagement, it has some challenges. One sticking point is privacy, since users must register for and use DemocracyOS under their real identity;[5] meanwhile, only around 70 percent of Buenos Aires has regular internet access, and infrastructure improvements are unlikely in the short term.[6]

The German Pirate Party began as an open digital movement pushing back against intellectual property laws, but grew quickly because of the party's stringent emphasis on transparency and collaboration.[7] The national party uses online platforms called PiratePads, a combination of collaborative documents and chat room platforms, to engage members in debate and discussion about politics and policy.[8] Capitalizing on the principles of liquid democracy, a dynamic hybrid of direct and representative democracy, the German Pirate Party holds a convention that is open to all members, where votes are held to establish the party platform and policy positions.[9] Liquid democracy is a structure whereby an individual can choose, at any time, where they wish to be on a spectrum between direct and representative democracy; the voter may decide to cast a vote directly, or may delegate their vote to another voter who can then cast a vote on their behalf.[10] When decisions need to be made during online discussions, the Pirate Party applies an algorithm to weight the preferences of the discussion and determine the result.[11]

The Pirate Party has had some electoral success, winning seats in regional government and sending one representative to the European Parliament, but it is still a relatively small party. In 2009, membership in the Pirate Party increased quickly in a short period of time, burdening the party with bandwidth challenges online and logistical challenges offline. If the party continues to expand quickly, it will likely struggle to maintain open conventions, and its online platforms could become overwhelmed by traffic and become more vulnerable. Furthermore, since policy decisions are voted on, the party could suffer from a dearth of strategic planning that could prevent it from gaining support.[12] However, the party's dedication to transparency and ability to engage voters has assembled a diverse coalition of supporters.

The founders and leaders of the Buenos Aires Net Party and the German Pirate Party successfully and effectively identified areas of civil disengagement and responded in unique ways: by developing new technology — DemocracyOS — or repurposing available online platforms — PiratePads — to better connect with and re-engage voters. Being involved directly in the policy development process helps voters feel that their voice is heard, provides buy-in to the final policy, and fulfills the party's fundamental role in democracy. Simultaneously, however, it requires that individual voters take the time to be responsible actors, either by educating themselves on issues or by delegating decisions to someone with knowledge. Providing forums for citizens to debate, discuss and revise policy proposals gives voters the impression that it is possible for their voice to be heard.

- Interactive digital platforms can help political parties become more responsive to citizen interests by decreasing the threshold for participation in policy development;
- The Buenos Aires Net Party programmed DemocracyOS as an online platform where policies would be debated and voted on;
- The German Pirate Party used pre-existing online collaboration tools to discuss, debate and develop policy proposals;
- Before implementing a purely digital policy or decision-making system, political parties should be aware of key contextual factors such as internet penetration, use and reliability.

[1] Rebecca Chao, “The Buenos Aires Net Party: Weaving a Bridge Between the Click and the Vote,” TechPresident, January 13, 2012, accessed December 12, 2014, http://techpresident.com/news/wegov/24660/buenos-aires-net-party-weaving-bridge-between-click-and-vote.

[2] Jeff Campagna, “Argentina’s Drag & Drop Democracy,” The Daily Beast, March 12, 2014, accessed September 9, 2015, http://www.thedailybeast.com/articles/2014/03/12/argentina-s-drag-drop-democracy.html.

[3] Ibid.

[4] Rebecca Chao.

[5] The semi-anonymity provided on the internet impacts political ICT in two very different ways: 1) perceived anonymity is a powerful force for “trolls” who seek to inflame other users; and 2) perceived anonymity also increases accessibility for marginalized populations hoping for political participation.

[6] Michael Scaturro, “Designing an Operations System for Democracy,” The Atlantic, July 19, 2014, accessed December 12, 2014, http://www.theatlantic.com/international/archive/2014/07/designing-an-operating-system-for-democracy/374526/2/.

[7] David Meyer, “How the German Pirate Party’s ‘Liquid Democracy’ Works,” TechPresident, May 7, 2012, accessed December 12, 2014, http://techpresident.com/news/wegov/22154/how-german-pirate-partys-liquid-democracy-works.

[8] Ibid.

[9] “Germany’s Pirate Party, The ayes have it,” The Economist, April 28, 2012, accessed December 12, 2014, http://www.economist.com/node/21553484.

[10] David Meyer.

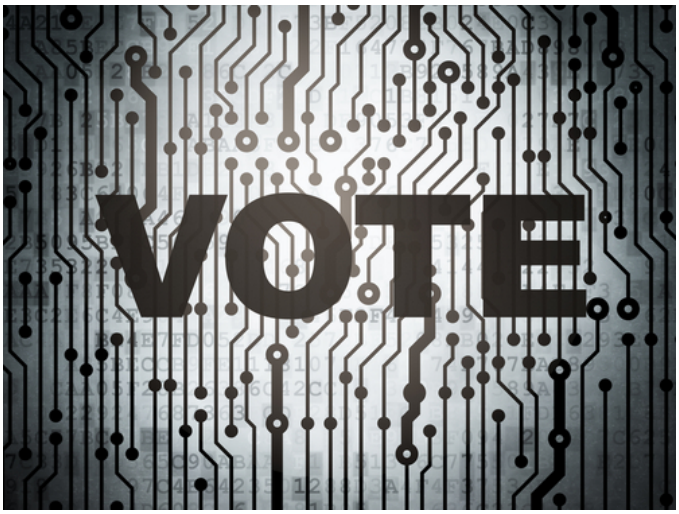
[11] Eric Westervelt, “A Party on The Rise, Germany’s Pirates Come Ashore,” NPR, June 6, 2012, accessed December 15, 2014, http://www.npr.org/2012/06/06/154388897/a-party-on-the-rise-germanys-pirates-come-ashore.

[12] Ibid.

# Denmark Liberal Alliance - Blockchain Secure Online Voting

tech4parties.org/case-studies/denmark-liberal-alliance-blockchain-secure-online-voting/

As civil society and government continue to digitize their services, many observers have wondered when political parties will get their 21st century facelift. Although cyber security fears remain prevalent, secure and transparent online voting may soon become a reality. In 2014, Denmark's Liberal Alliance party announced that it planned to use blockchain technology for secure electronic voting (or e-voting) at its annual meeting. While the party released limited information regarding the intra-party election or its results, this exploration of blockchain technology could lay the foundation for secure e-voting in the future.




The blockchain protocol functions similarly to a public database. Blocks, like database cells, store data — which, in an e-voting system, are votes — and then are encrypted. Meanwhile, if a blockchain is operating within a network, each system will obey the same encryption process, allowing the systems to proactively ensure the accuracy of each block. When blocks are created, they include a hash: a unique number that corresponds specifically to that block. Should a block be tampered with in any way, the hash would change.[1] The blockchain ensures the integrity of votes because each block's hash would be altered if someone modified the contents.

Multiple small projects seek to create similar mechanisms and, eventually, an effective, scalable platform for future blockchain e-voting systems. [2] Although the use of blockchain technology for voting is still in its infancy, there is significant potential for secure and transparent e-voting in the future. Because these new voting technologies change the way many elements of the electoral process are conducted, internationally recognized election standards must also adapt in order to safeguard electoral integrity and encourage the public's trust in their use.

- Blockchain technology could provide a secure and verifiable e-voting platform for internal party decision making or national elections;
- High-functioning democratic political parties are experimenting with ICT solutions to increase public access to voting.

[1] "Block Chain," Bitcoin Wiki, October 22, 2014, accessed January 14, 2015, https://en.bitcoin.it/wiki/Block_chain.

[2] David Parker, "Blockchain Voting Used By Danish Political Party," CryptoCoins News, April 24, 2014, accessed January 14, 2015, https://www.cryptocoinsnews.com/blockchain-voting-used-by-danish-political-party/.

# South Africa's ANC - Mobilizing Mobile Users

tech4parties.org/case-studies/south-africas-anc-mobilizing-mobile-users/

Youth voters comprise a significant voting bloc for political parties to target and engage. That's particularly true in Africa, the Middle East, South Asia, and Pacific Island nations, where a large proportion of the population is under 35. In South Africa, the African National Congress (ANC) hoped to use technology to better connect with youth voters and encourage political engagement. The party felt that developing a mobile phone application could be an affordable and effective way for South African mobile phone users, especially youth voters, to learn about the party's structure and policies, and gain information about upcoming elections.

When the party first developed the "MyANC" app, officials tested it in the Western Cape province of South Africa and reached more than 400,000 users, the majority of whom were between the ages of 17 and 25.[1] MyANC aggregates content from the ANC's various digital platforms into a mobile app where users can easily read party news, find voting information, and view multimedia content. Providing this information through the MyANC app helped voters learn more about the ANC's policy proposals and upcoming events, participate in opinion polls, and sign up to volunteer.[2] After a successful pilot test in which MyANC engaged large numbers of youth, access to the app was expanded, allowing national reach.

With the expanded release, MyANC became the centerpiece of the party's digital identity, not just on the Mxit social platform,[3] but also across popular social media platforms. One of MyANC's unique characteristics reflects the party's understanding of the importance of two-way communication between a party and its supporters. Not only does the MyANC app provide relevant information to voters, but it also acts as a feedback loop for the party by allowing citizens to respond to items, provide comments to the party, and engage with party leadership.[4] With more than 700,000 downloads, the ANC won an award from Mxit as the most popular political application on the network.[5]

The MyANC app's success stemmed largely from the party's understanding of two specific political variables: the country's large youth population, and a high penetration of mobile phone usage. Recognizing the youth bulge's significance within the South African electorate helped the ANC successfully limit forces that are often pervasive in traditional political parties, such as a resistance to change or a tendency to downplay youth leaders as inexperienced. Similarly, the party recognized different generational styles and exploited them. For example, political parties that try to recruit volunteers through phone banks may find that they recruit large numbers of elderly citizens, but have little success with younger volunteers; however, if the party tries to recruit through SMS messaging as well, they may experience greater success reaching young people. Understanding context, and how groups of voters or volunteers interact with ICT, can help parties improve their outreach results.

- Effective strategic planning led the ANC to identify potential ICT solutions, including a mobile app, pilot test the mobile app's effectiveness, and expand the app to a broader audience;
- Mobile phone apps and SMS messaging connect with young voters "where they're at," often increasing engagement;
- Mobile phone applications help parties share information directly with their supporters, and a feedback feature built into the app can help parties adjust their messages instantly.

[1] "ANC Looks to Mobile App for Votes," TechCentral, 2014, http://www.techcentral.co.za/anc-looks-to-mobile-app-for-votes/45930/.

[2] Ibid.

[3] Mxit is a South African mobile instant-messaging and social network.

[4] Jacques Coetzee, "MyANC Launches New Mxit App for 'Better Citizen Engagement,'" Yahoo News, 2013, http://news.yahoo.com/myanc-launches-mxit-app-better-citizen-engagement-041507849.html.

[5] "ANC Wins Award for Mxit App," Fin24Tech, 2014, http://www.fin24.com/Tech/News/ANC-wins-award-for-Mxit-app-20141103-3.

# Mexico PAN Party's Twitter Contest



In 2011, Mexico's National Action Party (PAN) was interested in gauging public opinion and raising awareness of their accomplishments while in government. Rather than simply disseminating facts, party leaders hoped to engage voters in a conversation and leverage the social network of their supporters to spread their message. PAN organized a social media campaign on Twitter and Facebook to improve their visibility and increase citizen participation. In order to spark a conversation on Twitter, PAN announced that it would launch a Twitter contest under the hashtag #logrosPAN (PAN achievements) from June 1 – June 30, 2011.[1]


To incentivize participation and instigate a competitive spirit, PAN announced that participants would score points by tweeting with the #logrosPAN tag and being retweeted. At the end of the month, the Twitter participant with the highest score would win an iPad and recognition from the PAN party president. Focusing mainly on Twitter — PAN shared accomplishments through Facebook but encouraged participants toward Twitter — party members drafted messages for PAN's Twitter handles, but were shocked to see the overwhelming response from Twitter users.

Over the course of the contest, it was estimated that roughly 2,600 participants mentioned #logrosPAN around 135,000 times, with nearly 69.5 million views. The contest allowed PAN to identify and attract new active and influential supporters on social media. Although party strategists planned the contest to be a positive narrative of the party's accomplishments, they received numerous negative responses as well. This experience helped party leaders recognize that while they had control over their message initially, once it had been released, they lacked control over the platform and the conversation. Regardless, PAN leaders soon realized that negative comments could be helpful because they provided insight into the party's perceived weaknesses and challenges. Careful analysis helped PAN identify gaps in its platform and underrepresented citizen interests. Holding the Twitter contest created a digital space where PAN could talk directly to, and receive feedback from, citizens.

Political parties exist within democracies to aggregate and represent citizen interests. However, in many democracies — both fledgling and established — many parties still exhibit clientelistic tendencies. Fundamentally, representation requires two-way communication between political parties and the citizens they represent. The PAN Twitter contest is an example of how political parties can maximize social media platforms to better reach out to, and receive feedback from, citizens. The potential benefit from social media is multiplied for parties operating in rural and conflict environments where traditional forms of party communications may be less effective or dangerous.

- Social media is an outreach platform where parties and campaigns have control over their message and allows them to target specific audiences;
- The interactive nature of social media means that citizens can provide feedback and engage with parties, campaigns or candidates — i.e., giving free public opinion research.

However, parties cannot always control what social media users say about them so social media campaigns may backfire if there is an overwhelming negative response from the public.

[1] Julian Quibell, "Tuit-Tuit: Mexican Party Holds Twitter Contest to Improve Governance," NDI Tech, 2011, https://www.nditech.org/blog/2011/08/tuit-tuit-mexican-party-holds-twitter-contest-improve-governance.

# Cambodian Opposition Utilizes Non-Traditional Forms of Outreach | NDI



**Cambodian Opposition Utilizes Non-Traditional Forms of Outreach**

Fundamentally, electoral politics is about communication: political parties must hone their message and then successfully communicate it in order to persuade and mobilize as many voters as possible. But in rural constituencies, lackluster roads, haphazard postal systems, and unreliable telephones mean that political parties are hard pressed to communicate with voters through traditional channels.


However, in Cambodia, political parties — and youth wings in particular — have recognized the potential impact of mobile phones and social media technology. About 30 percent of Cambodia's population is younger than 25, mobile phone penetration rests around 90 percent, and the rate of internet use is rapidly increasing, which gives parties new options for creatively connecting with citizens.[1] In particular, parties have used interactive voice response (IVR) systems and social media platforms such as Facebook for effective non-traditional outreach.

In August 2014, five Cambodian political parties — Cambodian People's Party (CPP); Cambodia National Rescue Party (CNRP); FUNCINPEC; Republic Democratic Party (RDP); and League for Democracy Party (LDP) — established IVR systems to make party information more accessible to voters.[2] IVR systems store audio recordings for playback; when callers access the system on their phones, they interact by using voice prompts or inputting numbers on their phone. Citizens can also leave voice responses to prompts. Interested voters can call the IVR phone number to access party policy proposals, candidate lists, or other party information that is stored in the system. Within eight weeks, one party's IVR line had received more than 17,000 calls.[3]

Although IVR systems may not be flashy or hi-tech, they boost communication between democratic institutions and citizens, which is fundamental to a healthy democracy. Highlighting the importance of this technology, U.S. Ambassador to Cambodia William Todd said, "Establishing ways for citizens to interact with the political parties and relay their concerns improves the sharing of information and strengthens democracy."[4] In expanding and developing democracies where the political space may be limited, IVR systems increasingly provide political parties with effective, affordable and accessible platforms for disseminating party information outside of traditional or state-controlled media outlets.

Another way to operate outside of state-controlled media is by using social media platforms. For example, CNRP examined the country's demographics and technology environment and decided that using social media made good political sense. CNRP proactively cultivated a strong social media presence, using Facebook to connect with the more than 700,000 Cambodian users.[5] On its Facebook page, the CNRP offered policy alternatives to the CPP government and successfully organized large scale protests.[6] Connecting with youth voters who distrusted traditional media and felt marginalized by the Cambodian government, the party's messages would often be shared with family members as alternative information sources.[7]

These two non-traditional forms of outreach demonstrate parties' options for communicating with potential supporters in more closed societies. What made CNRP's communication strategy so successful was the party's understanding of the surrounding tech environment. By figuring out that many Cambodians used their mobile phones and Facebook to receive and spread information, CNRP benefited by taking advantage of these tools, which were already being utilized by their members and supporters to spread their message.

- In closed political environments with state-controlled media, social media outreach allows parties to maintain control over their message;
- Mobile phones — voice and SMS messaging — are effective outreach tools for political parties in rural environments;
- Mobile phone and social media outreach is generally particularly effective for youth engagement;
- IVR systems and social media can be used interactively to disseminate or collect information.

[2] William Todd.

[3] William Todd.

[4] William Todd.

[5] Faine Greenwood.

[6] Phoak Kung, "The Rise of Public Opinion in Cambodia's Politics," The Diplomat, October 2014, http://thediplomat.com/2014/10/the-rise-of-public-opinion-in-cambodias-politics/.

[7] Faine Greenwood.

# The European Green Party - Online Primary to Increase Participation, Fails to Connect

tech4parties.org /case-studies/the-european-green-party-online-primary-to-increase-participation-fails-to-connect/


Elections for the European Parliament generally suffer from lackluster citizen interest and subdued voter turnout. Heading into the 2014 European Parliamentary elections, the European Green Party (EGP) attempted to address this by organizing an online primary to select two candidates who would represent the EGP's policy platform across Europe. The EGP hoped the primary would generate enthusiasm among traditional supporters, encourage new supporters, and empower young voters. The goal was to mobilize at least 100,000 supporters to log online and vote.[1] The online primary was a historic attempt at engaging European voters to support the party's candidates; the EGP was the only European party to hold an open, online primary.[2] With EU-wide party membership totalling around 150,000 voters, the EGP's goal for participation was ambitious.[3]

EGP national member parties nominated four candidates to stand for the EU-wide primary; they were announced at the Autumn Party Conference in November 2013 in Brussels, Belgium. Participation in the online primary was simple: European voters 16 years and older could reach the online voting website, register an account, acknowledge that they supported the EGP policy agenda, and then cast their ballot. In addition to the ease of registration and voting, the EGP gave voters ample time to vote for their candidate of choice; the voting phase began on November 10, 2013 and lasted until January 28, 2014.[4]

The Green Primary was as open as it could be; however, as primary voting came and went, the EGP realized that accessibility was not the only variable to consider. The results were announced in early February 2014: Ska Keller of Germany and José Bové of France were the victors, with a total of nearly 22,000 votes cast.[5]

It appeared that democratic fervor was not as reliable a force as expected: turnout was around 22 percent and the EGP fell far short of its goal of mobilizing 100,000 voters.[6] However, while participation was lower than hoped, the party's strategic approach to the Green Primary increased intra-party democratic structures and limited technical glitches, but it misunderstood pan-EU cohesion.[7]

Functionally, the Green Primary was successful. The EGP empowered national parties to nominate candidates, constructive debates were held across Europe, citizens could engage the candidates, and the online voting period lasted nearly 80 days. But the Green Primary demonstrated that open and accessible party nomination processes or e-voting cannot be the only factors when considering an election's success. Instead, to engage voters and encourage them to participate, the stakes need to be higher.

This was the first election where parties could nominate a candidate for the European Commission, due to new mandates under the Lisbon Treaty of 2009. Judging by the results of the 2014 EU election overall, none of the parties mobilized enough support for this new electoral process. [8] Although the EGP's rollout of the technology for the online primary was smooth and well-planned, party leaders did not drum up enough support from their members to maximize the technology's full potential.

- Many parties and campaigns see e-voting as a platform for more accessible decision making and higher citizen participation, but contextual analyses and strategic planning should be used to assess interest and clarify the level of marketing needed to encourage participation.

[1] Sabrina Pabst, "Online Voting Flops for European Green Party," Deutsche Welle, 2014, http://www.dw.de/online-voting-flops-for-european-green-party/a-17395839.

[2] "Press Release: Ska Keller and José Bové Will Lead the Greens in Their European Campaign," European Green Party, 2014, http://europeangreens.eu/news/press-release-greens-select-leading-candidates.

[3] Johannes Hillje, "Green Primary – Pioneering Work is Hard, but Worth it!" Europe Decides, 2014, http://europedecides.eu/2014/02/green-primary-pioneering-work-is-hard-but-worth-it/.

[4] "The Green Primary is Easy!" European Green Party, 2013, http://europeangreens.eu/news/green-primary-easy.

[5] "Press Release: Ska Keller and José Bové Will Lead the Greens in Their European Campaign."

[6] Sabrina Pabst.

# Moldova - Social Canvass by GQR Digital

tech4parties.org/case-studies/moldova-social-canvass-by-gqr-digital/


Moldova's relationship with the European Union was a major issue that was repeatedly highlighted during the country's parliamentary elections on November 30, 2014. While the country's three pro-European parties won a plurality of the votes, the Liberal Democratic Party of Moldova (PLDM) won the most seats of the three. One program in particular that boosted PLDM's performance in 2014 was its digital campaign — specifically, its use of a new social targeting and outreach program designed by GQR Digital called Social Canvass. This innovative application of technology optimized PLDM's digital presence and helped the party better communicate its message to targeted voters.[1]

PLDM's digital campaign using the Social Canvass application allowed the party to effectively communicate its message over social media, specifically Facebook, to targeted voters through paid advertisements and messages. Social Canvass works through social media. First, a PLDM supporter would approve access for the application to their Facebook network. Social Canvass would then collect multiple data points from the supporter's friends' Facebook profiles, analyze the data, and compare it to voter information in order to identify trends and key swing voters.[2] The software would then prompt PLDM supporters on social media to send personal messages to any targeted voters in their network. Using this tool, PLDM knew its money was being spent on engaging key, targeted voters, rather than allocating resources to engage party activists or unlikely voters.[3]

As internet penetration rates continue to rise around the world, political parties in many countries have turned to social media to help them build public support or gain publicity. However, GQR Digital's development of Social Canvass goes one step further, demonstrating a technological innovation in the program's ability to aggregate and analyze data from social media. PLDM's digital campaign with Social Canvass showed that the party understood technology's strategic impact in campaigns: parties are best served by technology that helps them connect directly with voters.

In Moldovan politics, one highly sought after constituency is diaspora voters, comprising between 500,000 and 1 million citizens who are eligible to vote, although diaspora turnout has been significantly lower.[4] In the past, it has been challenging and expensive to communicate messages internationally, and political parties have tended to primarily be concerned with domestic campaigning. However, social media allows parties to target users across borders at a relatively low cost. Further, the Moldovan diaspora have greater access to the internet than citizens living within the country's borders —where only 37 percent have internet access — making social media a cost-efficient means of communication when trying to engage diaspora voters.[5]

The Social Canvass application implemented by the PLDM demonstrates how political parties can leverage the full potential of social media. Developing an effective message requires information about the electorate, and microtargeting that message requires even more. Traditionally, political parties must generate that data actively, through public opinion polling or direct voter contact. Social media provides the potential to flip the dynamic on its head, as voters become the actors. Through their social media profiles, voters actively — whether intentionally or not — share information that informs political party targeting, saving parties time as well as social and human capital. Using tools like Facebook and Twitter Analytics, parties can assess the quality and quantity of engagement, and identify content that resonates. For the PLDM, Social Canvass proved a valuable resource by further streamlining the party's capacity to aggregate and analyze data for microtargeted digital outreach.

- When registering their profiles, social media users share significant personal information that can help parties and candidates draw conclusions about the effectiveness of their messaging;
- Software that aggregates and improves microtargeting can help parties share messages with precisely the audiences with whom they will have the most impact.

[1] "Small Country Uses Big Data to Drive Historic Vote," Greenberg Quinlan Rosner, 2014, http://www.gqrr.com/casestudies/moldova-social-canvass.

[2] Although the EU heavily protects the right to privacy, personal data, and "the right to be forgotten," it explicitly authorizes access to political parties for the purpose of elections. "Protection of Personal Data," European Commission, 2014, http://ec.europa.eu/justice/data-protection/

[3] "Small Country…"

[4] "Moldovan Diaspora Groups Asking for More Voting Stations Abroad," Moldova.org, 2009, http://www.moldova.org/moldovan-diaspora-groups-asking-for-more-voting-stations-abroad-182503-eng.

[5] Viorel Munteanu, "Policy Implication for Attaining Sustainable Development of Broadband Access Technologies in Moldova," ITU Seminar, 2011, http://www.itu.int/ITU-D/tech/events/2011/CrossReg_BWA_Chisinau_October11/Presentations/CrossReg_Broadband_2011_Presentation_P9.pdf.

# Spain’s Podemos | NDI

tech4parties.org/case-studies/spains-podemos/

**Spain’s Podemos**


The Spanish political party Podemos officially registered as a party in March 2014 and enjoyed immediate electoral success; in Spain’s May 25, 2014, European Parliamentary elections, the party won eight percent of the vote and gained five seats, despite polling at less than three percent in the week before the election.[1] Its strong showing has been credited to both strong reforms and its innovative use of technology that turned decision making into an inclusive, transparent process.[2] By focusing on social media and participatory democratic values, Podemos was able to to engage citizens better than Spain’s two traditional major parties — the center-right Popular Party (PP) and the Spanish Socialist Party (PSOE) — had. Furthermore, the party’s focus on crowdfunding limited conflicts of interest, and informal norms encouraged both online accessibility and offline participation.

Podemos experimented with various internet platforms and social media venues to approach Spanish politics differently than other political parties had. For example, since transparency and anti-corruption were key tenets of Podemos’ platform, the party relied significantly on online crowdfunding in order to remain financially independent of corporate and special interests. Between March and August 2014, Podemos raised over $200,000 from more than 10,000 people online.[3] Similarly, Podemos used platforms like Agora Voting, TitanPad, Appgree, Loomio and its own Plaza Podemos to hold inclusive, citizen-led discussions, creating an accessible dialogue on policy development. Using Agora Voting, the party held open, online primaries for the 2014 European Parliamentary elections and to select executive leadership for the Constituent Party Assembly. Although only 33,000 votes were cast, Podemos placed no requirements on party membership, creating an open primary that was truly accessible to the Spanish people.[4]

One of the keys to Podemos’ successful use of ICTs has been its system for piloting new tools. The party is divided into local associations called *circulos*, which often serve as testing grounds for new technology before it is implemented by the national party. When the circulos first met, many members used TitanPad, a collaborative document application that allowed them to share notes or discussions. Furthermore, the circulos tested out Appgree and Loomio, applications which allow users to pose questions or communicate with people within their circulos and receive nearly instantaneous responses.[5] The constant while piloting these innovative applications was Podemos’ Reddit board, Plaza Podemos, an open, online discussion forum where party members can debate policy specifics.

Podemos espoused democratic values by encouraging and empowering grassroots activism, creating structures for members to participate directly in party affairs — e.g., policy development — and operating in a transparent manner. Using the internet, social media, and digital platforms for many party functions created a convenient and accessible structure that has helped encourage participation. Although Podemos is not the only political party in the world to conduct online organizing or use social media, Podemos’ ability to utilize its web 2.0 prowess to address a perceived representation crisis helped the party achieve electoral success, winning five European Parliament seats in 2014, breaking PP and PSOE majorities in May 24, 2015 regional elections, and polling as a top party in advance of Spain’s 2015 general elections.[6]

- Online organizing helped Podemos develop policies in response to citizen interests, increase political support, and encourage supporter participation;
- Crowdfunding lower-value donations from a higher number of supporters can empower supporters by increasing their confidence that their party or candidates are responsive to their needs rather than special interests;
- Local *circulos* connected the party’s national online organization to traditional grassroots activists.
- One key to Podemos’ success, was testing. By piloting new tools and approaches at the local level before, Podemos was able to identify and address any possible technical glitches and other problems before deploying them nationally. While this approach may delay the initial release date, it can save money and time in the long run.

[1] “El PP saca 8 puntos al PSOE y Vox alcanza un escaño,” Libertad Digital España, 2014, http://www.libertaddigital.com/espana/2014-05-18/el-pp-ganara-las-europeas-por-ocho-puntos-y-vox-sacara-un-escano-1276518883/.

[2] Carola Frediani, “How Tech-Savvy Podemos Became One of Spain’s Most Popular Parties in 100 Days,” TechPresident, 2014, http://techpresident.com/news/wegov/25235/how-tech-savvy-podemos-became-one-spain%E2%80%99s-most-popular-parties-100-days.

[3] Ibid.

[4] Ibid.

[5] Kathryn Cave, “Spain: Podemos & the Rise of the New Left Online,” International Data Group Connect, 2014, http://www.idgconnect.com/abstract/8817/spain-podemos-rise-new-left-online.

[6] Katrina Eckweiler, “Podemos, the New Threat on Spain’s Political Horizon,” International Policy Digest, 2015, http://www.internationalpolicydigest.org/2015/01/27/podemos-new-threat-spain-s-political-horizon/ .

# Green Party of New Zealand Crowdsources Question Time on Social Media

tech4parties.org/case-studies/green-party-of-new-zealand-crowdsources-question-time-on-social-media/

Question Time is a central feature in many parliamentary democracies around the world; it provides an opportunity for Members of Parliament (MPs) to ask questions of and seek clarification from government ministers. In April 2015, recognizing that citizens deserved an opportunity to hold their government accountable on issues relating to climate change, the New Zealand Green Party introduced an initiative to crowdsource climate change questions using social media. Announced by Green Party co-leader MP Dr. Russel Norman in a video uploaded to YouTube, Norman indicated the party's motivation for the initiative, saying, "In the age of social media, there's no excuse why the public shouldn't be more involved in asking questions of those in power, who are making decisions which will affect us all.[1]"


Using the Twitter hashtag #myclimatequestion and the party's Facebook page, the Greens empowered citizens to tweet or post any climate change questions they wished to have answered by ministers between April 24, when the initiative was announced, and April 27.[2] After the nomination period, the party identified the "top 10" questions and set up an online poll to select which questions they would ask in Parliament.[3] When Question Time was held on April 29, Norman included eight questions that had been submitted and selected online by citizens during his "Questions for Oral Answer" of the Honorable Simon Bridges, the Acting Minister for Climate Change Issues.[4] After Norman's contributions at the start of Question Time, #myclimatequestion became a trending topic on Twitter in New Zealand, with @TTMobile_nz reporting that it had trended as high as sixth place. [5]

On its own, parliamentary question time is a mechanism through which MPs — especially members of opposition political parties — can hold the government accountable on behalf of their constituents. The Green Party's decision to crowdsource questions on social media from concerned citizens, and to put those questions to the government, demonstrated how social media's interactive format can shape politics. Recognizing that climate change is a large-scale issue with far-reaching consequences, the Greens hoped that citizens' voices would prove influential with their colleagues in Parliament and the government.

- Social media's interactive communications capacity has the potential to connect citizens more closely with politics, parties and the government, and could revolutionize civic participation;
- By utilizing both Twitter and Facebook, the New Zealand Green party increased its audience and facilitated a real discussion, illustrating the utility of these social media platforms;
- The online poll allowed citizens to identify those issues most important to them, and gave them the opportunity to prioritize those questions brought up by other party members.

[1] Stacey Kirk, "Want to hold the Government to account on climate change? Now's your chance," Stuff, April 24, 2015, accessed April 29, 2015, http://www.stuff.co.nz/national/politics/68039399/want-to-hold-the-government-to-account-on-climate-change-nows-your-chance.

[2] "My Climate Question," The Green Party of Aotearoa New Zealand, accessed April 29, 2015, http://action.greens.org.nz/myclimatequestion.

[3] Ibid.

[4] "Questions For Oral Answer: Climate Change Policy – Commentary," New Zealand Parliament, April 29, 2015, accessed April 29, 2015, http://www.parliament.nz/en-nz/pb/business/qoa/51HansQ_20150429_00000001/1-climate-change-policy%E2%80%94commentary; Green Party of Aotearoa New Zealand Facebook, accessed April 29, 2015, https://www.facebook.com/nzgreenparty; "#myclimatequestion," Twitter, accessed April 29, 2015, https://twitter.com/search?src=typd&q=%23myclimatequestion.

[5] "@TTMobile_nz," Twitter, April 29, 2015, accessed April 29, 2015, https://twitter.com/TTMobile_nz/status/593468877260103681.

# Glossary | NDI

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**Glossary**

1. **add-on software**– A software component that adds a specific feature to an existing application, such as a browser extension for Google Chrome or Adobe Flash Player.
2. **bandwidth**– The bit-rate of available or consumed information capacity, or the average rate of successful data transfer through a communication path.
3. **blockchain technology-** A public ledger that holds and proves all network transactions securely. As blocks are added, a recording is added to the chain in both a chronological and linear order. The blockchain history cannot be manipulated, and information can only be added.
4. **CiviCRM**– A web-based, open source suite of computer software for constituency relationship management that manages information about donors, members, event registrants, volunteers, and more.
5. **"cloud" applications**– Application software such as Google Docs that exists in the cloud, meaning users can operate the application from many– rather than one– internet-enabled devices. Clouds can be public, private, or hybrid.
6. Constituent Relations Management (CRM) software – Software such as CiviCRM that specifically helps a political party or campaign manage and track interactions with its members. Although the software can be expensive, it allows the party or campaign to log its interactions with members and volunteers, which is valuable data.
7. **direct democracy**– A democratic system in which the citizens debate and vote directly on proposed legislation, rather than voting for representatives who make legislative decisions for them.
8. **e-voting (electronic voting)**– Voting using electronic systems to cast and count votes through punched cards, optical scan voting systems, voting kiosks, or the transmission of ballots/votes via telephone, private computer networks, or the internet.my belly looks pretty big int hat picture,
9. **GOTV (Get Out The Vote)**– During a political campaign, the last few days up to and including election day are part of the GOTV effort. The effort aims to increase voter turnout on election and involves door to door canvassing and phone calls.
10. Information Communication Technologies (ICTs) – Any applications or devices that enable users to access, store, and transmit information. The term usually stresses the role of unified communications that integrate telecommunications, computer networks, and audio-visual systems, and more.
11. Interactive Voice Response (IVR) – Technology that allows people to interact with pre-recorded or dynamically generated audio responses over the phone through the keypad or speech recognition.
12. **intranets**– Private networks that are accessible only to the members of an organization and contain means of internal communication and collaboration, as well as internal and external resources.
13. **levels of access**– Refers to the different levels of access a user can have to a network. For example, at a low level of access, a party website user would only be able to *see* the party's platform. But at a high level of access, the user would be able to edit the platform and decide where to put it on the site.
14. **liquid democracy**– A form of democracy in which delegates, rather than representatives, have voting power. At any time, constituents can recall their delegates, and often a popular referendum can override delegate decisions. Constituents can, but do not have to, vote on delegated matters, and review delegates' decisions.
15. **list segmentation**– Email list segmentations allow an organization like a party to send targeted emails to segments of its email list subscribers. For example, a party could send an email to members within a certain radius, or only to members who have participated in a recent event.
16. **Listservs**– An electronic mailing list that allows a user to send one email to the list's address, rather than to the address of each of the list's subscribers.
17. **"look-alike" targeting**– An online advertising technique that uses data from CRM software or browsing behaviors to target audiences similar to the advertiser's desired audience.
18. **mobile phone application-** A program developed to run on smartphones, tablets, and mobile devices, and is available through an application distribution. Different kinds of organizations use apps to distribute information to and engage with app users.
19. **Mohalla Sabhas**– 'Town hall' meetings that the Indian Aam Aadmi Party has created to allow citizens to decide their locality's work and development budget.
20. **off-the-shelf**– Available to be bought and sold commercially. For example a party might purchase off-the-shelf software for its database from a retailer, rather than commission a vendor to make custom software.
21. **open-source technologies**– Technologies that are available to the general public at little or no cost for use and/or modification without violating copyright or licensing laws.
22. **phishing**– the activity of defrauding an online account holder of financial information by posing as a legitimate company.
23. **proprietary technologies**– Also known as closed-source, technologies explicitly owned by vendors and sold to organizations.
24. **scope creep**– When a project designed to solve one set of problems gradually morphs into something much larger without a clear agreement for it to do so.
25. **search ads** – A method of placing online advertisements on web pages that show results from search engine queries. Through the same search-engine advertising services, ads can also be placed on Web pages with other published.
26. **Sharepoint**– A Microsoft Office web application that performs various internal functions (usually for organizations) such as intranet, extranet, document management, content management, personal cloud, and more.

27. **smartphones**– Mobile phones with advanced operating systems that connect to the internet, run third-party apps, play media, and take pictures, in addition to make making phone calls and sending SMS messages.
28. **software patches**– Pieces of software that update, fix, or improve a program or its supporting data.
29. Specifications documents (“Specs”) – These documents outline: a comprehensive description of project objectives; technological, temporal, budget, and other constraints; features; maintenance considerations; and relevant case studies.
30. **TAILS-** A secure operating system that aims to preserve privacy and anonymity by forcing all outgoing connections to go through Tor (free anonymous communication software) and blocking direct, non-anonymous connections.
31. **technologists**-Experts in the field of information technology who sell their services, which include installing and maintaining IT, as well as evaluating an organization’s technology needs.
32. **vendor**– Anyone one or any organization that sells goods and/or services. For example, a party might hire an outside technology vendor to design software for its voter management database.
33. Virtual Private Networks (VPNs) – Networks that allow a computer or other network-enabled device to send and receive data across shared or public networks as if it were directly connected to the private network, while benefiting from the functionality, security, and management policies of the private network.
34. Voice Over Internet Protocol (VOIP) – A means of delivering voice communications, fax, and SMS over the internet rather than through regular telephone network.
35. **web browser “cookies”**– Pieces of data sent from a website and stored in a user’s web browser. Every time the user returns to that website, the browser sends the cookie back to the server to notify the website of the user’s previous activity.
36. webinars– Conferences or presentations hosted over the internet, usually in real time, that allow presenters and participants to interact with each other. Viewed asynchronously, webinars act as one-way audio and video webcasts. Webinars are often used for workshops and remote trainings.
37. **WhatsApp**– A subscription-based instant messaging app for smartphones across platforms that allows users to send SMS, image, video, and other messages to other app users over the internet.
38. **Wikis**– Web applications that allow for collaborative modification, extension, or deletion of their content and structure. Wikis are content management systems that have no defined owners and little implicit structure.