

Networked Change

How progressive campaigns are won in the 21st Century

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About Us

The stars of this story are the campaigners and movement builders on the front lines of today's most important social change efforts. With their diverse backgrounds and skills, they stepped up to face injustice and to fight systems with much greater wealth and power. In the process, they did the hard work of trial and error to discover the approaches needed to win against all odds. Our ultimate intention with this report is to support them and inspire others to follow their lead.

The authors...



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Having pioneered distributed organizing tactics as global coordinator of Adbusters' Buy Nothing Day in the late nineties, senior NetChange strategist **Tom Liacas** went on to the private sector where he developed expertise in social media marketing and online stakeholder dialogue. His insights on the power of networked social movements have led him to speak repeatedly before the leaders of major NGOs and Fortune 500 companies. He also writes frequently on these subjects for The Guardian, Mashable and Mobilisation Lab.

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Executive Summary

The Networked Change Report maps out the strategies and practices that made today's most successful advocacy campaigns work, while so many others failed to create lasting change on the issues they address.

We started by identifying advocacy campaigns over the last ten years that achieved significant *impact* insofar as they forced changes to corporate or government policies or created widespread attitude change. To reflect the needs of most progressive organizers, we put special emphasis on groups that started with relatively few resources and went on to achieve substantial victories – a capacity that we are calling force *amplification* in this report.

The final study sample, a total of 47 campaigns, is largely North American and includes campaigns from all sides of the political spectrum, a wide variety of more traditional causes and finally, corporate campaigns that mobilized their client base.

Institutional heavyweights, grassroots upstarts and directed-network campaigns

As we sorted through our data, three groupings emerged based on organizational scale, structure, and impact.

In this three-tiered classification, *institutional heavyweights* such as the NRA, AARP and US Chamber of Commerce are older organizations that function in a top-down manner, run very efficient and effective pressure campaigns and apply considerable acquired clout and capital to successfully influence government legislation.

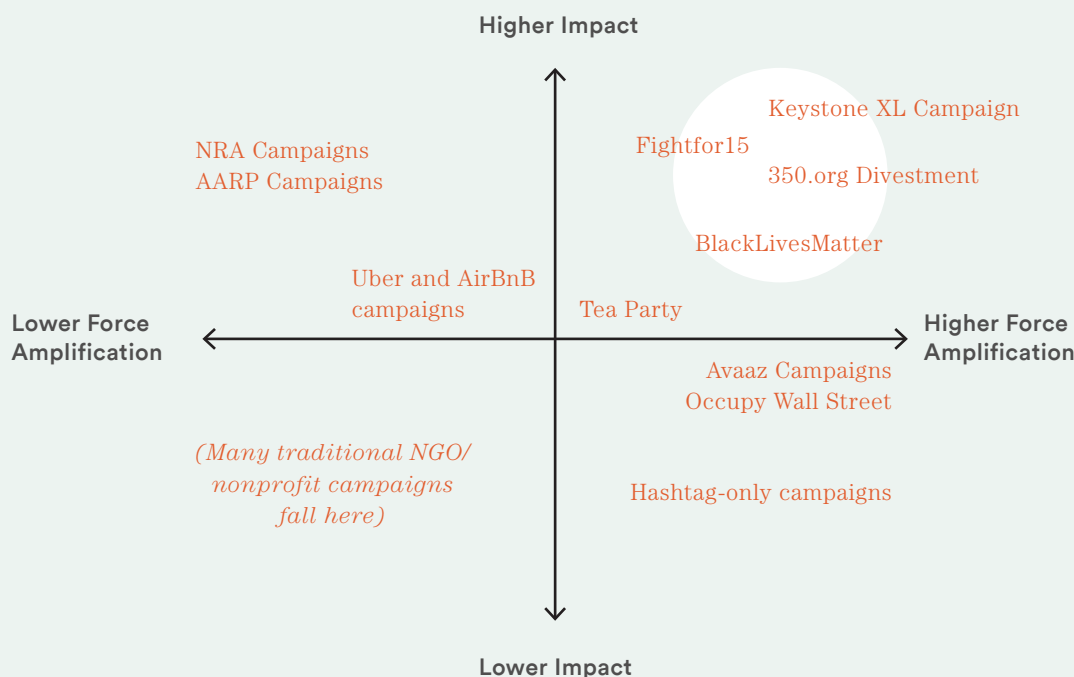




Grassroots upstarts, such as the Occupy Wall Street network, Arab Spring uprisings and many hashtag-driven campaigns, typically have few resources at the outset and are largely driven by self-starting supporters who coordinate actions through a very open and horizontal decision making structure. These movements and campaigns succeed in creating dramatic growth and raising a wider discourse around the issues they champion but often fail to create sustainable systemic change.

The third group, what we call *directed-network campaigns*, performed exceptionally well in terms of both impact and force amplification and are therefore the largest source of strategic insights in this report. Exemplified by cases such as the Fightfor15, Not1More and the Keystone XL campaign, they are typically led by a central body that frames the issues and coordinates energies towards shared milestones but also leaves a fair amount of freedom and agency to grassroots supporters and a diverse network of inside and cross-movement allies. Starting with relatively few resources, these campaigns mobilized complex organizational structures and an engaged supporter base for sustained periods of time and achieved some degree of policy and cultural change.

Fig 1: Matrix with several campaign case studies classified according to their Impact/ Force Amplification qualities with directed-network campaigns top right

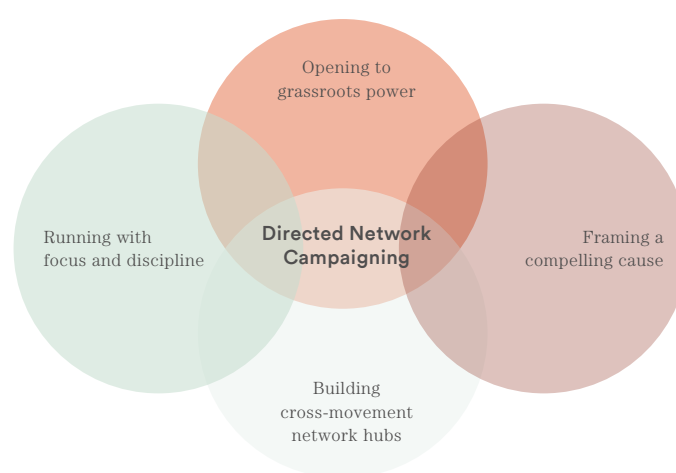


4 Principles common to directed-network campaigns

Having identified this relatively new yet highly successful category of campaigns, we wanted to ensure that this report served as a practical tool for both traditional and grassroots campaigners to integrate best practices into their work. With this in mind, the bulk of the report is spent unpacking the strategic and tactical approaches common to the highest-performing cases in our study group.

The four Principles below represent the main pillars of directed-network campaigning. In Section 2 of the report they are further detailed into operational *approaches*, which lay out concrete tools, tactics, and practices employed to operationalize the principles.

Fig 2: Four strategic principles common to directed-network campaigns



Why directed network campaigning gets the goods

Our experience and research into wider cultural trends leads us to conclude that directed-network campaigns succeed because they are aligned with new sources of self-organized people power but maintain enough centralized structure to focus it on clear political and cultural targets. In other words, they successfully marry new power with old power.

By opening to new models of organizing in a *network society*¹, directed-network campaigns generate greater public engagement and achieve rapid scale with relatively few resources at the outset. With an executive structure that establishes strategic direction and carefully manages resources, these campaigns have what it takes to survive in an advocacy landscape now saturated with information and calls to action that compete for our attention.

This new model has now reached a scale where it is extremely relevant to those working for social change and to those funding such work. It is our hope that the findings in this report will enable accelerated implementation of best campaigning practices by progressive movements of all sizes.

Methodology

The Networked Change Report's primary research goal was to determine what makes some of today's most successful advocacy campaigns work, while so many others fail to make an impact.

"Success" in our model is defined in two ways. First, it is measured by "impact", namely clear changes in corporate or government policy and / or widespread attitude change as a result of campaign activity. Second, impact is measured in relation to the base resources of the organization or network leading the advocacy efforts. Here, by measuring how much a campaign achieved given its capacity at the outset, we add "force amplification" as a key factor. Therefore, in our model, groups that started with relatively few resources and went on to achieve substantial victories are viewed as even more successful than large legacy organizations that achieved similar results with substantial pre-existing membership and resources.

The 47 case studies isolated for this report were all deemed "successful" according to the criteria above. Looking across the political spectrum, we reviewed progressive causes such as BlackLivesMatter, Fight-for15, Not1More, the movement to stop the Keystone XL pipeline as well as conservative powerhouses such as the NRA and the Tea Party and recent corporate campaigns by Airbnb and Uber.

Our study group was mostly North American and therefore the campaigns studied emerged in environments benefitting from democratic freedoms and relatively high levels of education, digital literacy, communications expertise and financial resources rela-

tive to groups operating in different parts of the world with different political and socioeconomic contexts.

The data that formed the basis for the report was gathered through research that was in depth and in many cases first person and hands-on. The study sample is composed of 47 campaigns that were examined over several years. Of these, the authors participated in frontline campaign work on 16 cases. They interviewed campaign directors in 11 cases, and performed detailed literature reviews for the remaining samples. A full catalogue of all campaigns studied as well as the research approach applied to each is presented in Appendix C.

In a first pass through the data, study cases were evaluated according to the extent of their policy or attitude change impacts and then reclassified according to the organizational resources available to the campaigns at the outset. These filters produced a three tier classification of campaigns described in Section 1 and isolated a class of campaigns called "directed-network campaigns" which were deemed especially valuable for our study since they responded to our success criteria both in terms of their impact and force amplification.

To organize the research, we used a pattern matching approach that identified recurring practices in the campaigns studied and then isolated the most common to directed-network campaigns. The operational approaches revealed by our study were then grouped under four thematic principles. Each approach is explained in some detail in the report with anecdotes to illustrate how they were implemented by groups in our study.



Introduction: New power, new challenges

This report springs from our straightforward intention to accelerate innovations that work in social change organizations.

Like many of our peers, we started to notice a long time ago the consulting we did for social change institutions had relevance and ripples far beyond their digital strategy, programs, and teams. Digital was the way into a much bigger conversation about innovation, about where an organization was vital and growing and where it was weak and what its staff, supporters and political environment were asking it to evolve to next in order to have more impact.

On and off over the past decade, bright lights of exciting new forms of campaigning and movement building blinked on, then seemed to disappear again. A whole new sector of “digital-first” online organizing groups took hold and grew exponentially across nearly every issue space, though it wasn’t always clear what relevance their petition-driven models had for the rest of the sector. We were involved with some exciting experiments in “networked” or “open” campaigns, but the model didn’t replicate widely.

During the Arab Spring uprisings, Occupy Wall Street and the wider waves of economic protest at the beginning of the decade a feeling had emerged – however misguided – that you didn’t need organized resources to change the world. All it took to raise a movement, it seemed, was a spark, a call to action that rallied sufficient numbers of followers, and online mobilization would do the rest. The role of the traditional NGO in all this was becoming increasingly uncertain.

But for the few edge cases that took the world by storm, there were still countless social change issues that never gained traction. What’s more, several of the movements born around 2011 came in fast but also faded just as quickly. In doing so, they left behind a fragile legacy and one that has been mostly overwritten since, in the case of several Middle Eastern protests.

“It is definitely easier now to seize a national advocacy moment but converting that moment into a movement requires strategy and resources. 30 years ago, I think the resources were easier to come by, but the moments were harder to seize. Now we have excellent opportunities for moments, but often struggle to leverage them effectively.”

- David Karpf, Associate Professor, George Washington University School of Media and Public Affairs.



This is the paradox of campaigning in the 21st century. With the new possibilities offered to us in a *network society*², raising a critical mass of supporters in a short amount of time has never been more possible. At the same time, with the complexity of the world’s “wicked problems” and the scarcer resources now available to nonprofits, rallying the support and attention of people to your cause while building enough power to create systemic and lasting change has never been more challenging.



In the past five years, however, something shifted as younger organizations and even some larger NGOs began to run on an innovative mix of grassroots self-organization and top-down strategic leadership. As a result, a considerable number of groups and movements in North America are now punching above their weight and scoring concrete, systems-busting victories. In 2016, the most talked about campaigns – #Fight for 15 (\$15 minimum wage), BlackLivesMatter, Keystone/Tar Sands/Climate and Bernie Sanders’ election race – are all living proof that it is possible to run networked people-powered campaigns that are focused and effective at the same time.

In this growing body of cases, the right mix of timing, strategy and approach is leading to game-changing successes. While still emergent and experimental, we believe it is possible to unlock the “recipe” behind the successful rise of such breakthrough campaigns and a good part of this report is given to unpacking the concrete approaches these high performers used to operationalize their winning strategies.

It is our hope that the synthesis of this research delivers a clear and powerful blueprint for winning modern advocacy campaigns. Though the focus here is campaigning, the core learnings are more largely about transforming social change approaches to capitalize on new possibilities and cultural expectations the 21st century landscape provides. As such, there is a much within this report that can also be applied to the practices of nonprofit management, fundraising and organizational change.





Section 1: Overview of findings

Institutional heavyweights, grassroots upstarts and directed networks

Our report focuses on the campaigns, movements and organizations that broke through during the past decade, generating enough traction to start a wider national or international conversation around the issues they championed and in most cases, enough sustained power to create lasting change.

Looking at the body of successful campaigns we analyzed, we can roughly fit them into three groups: established institutional heavyweights, grassroots upstarts and what we are calling directed-network campaigns. The table below summarizes our observations on these three types of campaigns and campaigning groups.

Fig 3. Case study classification and characteristics

TYPE	EXAMPLE	STRUCTURE	ASSETS	STRENGTHS	WEAKNESSES
Institutional heavyweights	NRA, AARP, US Chamber of Commerce	Central leadership, top-down control	Massive, engaged membership bases and large advocacy budgets	Focused and disciplined, achieve concrete victories	Less nimble, slower to scale and vulnerable to demographic trends
Grassroots upstarts	Arab Spring uprisings, Occupy Wall Street network	Horizontal, “leaderful”	Strong public passion and drive around central campaign cause, inclusiveness + empowerment of participants	Speed, agility and force amplification	Onerous decision-making process, trouble focusing on unifying goals, lack of resources to sustain effort
Directed-network campaigns	Fightfor15, Not1more, Keystone XL campaign, 350.org campaigns, Bernie Sanders election campaign	Central strategic leadership with considerable agency + autonomy for supporters	Established membership and funding + approaches which channel supporter passion and initiative	Speed, agility and force amplification + focused and disciplined, achieve concrete victories	High degree of complexity and relationship management requires new leadership skills + technology



In the heavyweight camp are legacy organizations like the National Rifle Association and the American Association of Retired People. While these groups are recognized powerhouses and therefore not strongly driven to innovate, they have learned over time how to focus their significant resources in moments of battle and drive their members to swarm political and corporate targets with hundreds of thousands of messages, calls and in person visits.

The second group of grassroots upstarts includes Occupy Wall Street and Idle No More. These are movements that started with little or no formal infrastructure and relatively few resources but quickly built up considerable traction and international prominence. While they rarely achieve policy change, they open up vital discourses around issues that were previously ignored by the mainstream and often prepare the ground for future leaders and organizations to make bigger change.

The final group is an interesting emerging model we are calling directed-network campaigns. These are campaigns that build on grassroots power and rally diverse networks of support, but are directed overall by structured organizations with existing resources and capital. In this camp, we place the Keystone XL campaign, Fightfor15, Not1more Deportation, and Bernie Sanders' rise in the U.S. election primaries.

Directed-network campaigns started out with some degree of funding, professional support and established infrastructure and often acquired more resources as they grew and gained traction. In every case, however, they could be considered “underdogs” relative to the political or corporate opponents they were campaigning against and certainly, they did not have the acquired power and membership of groups in the “institutional heavyweight” camp.

From the start, directed-network campaigns were constructed in such a way as to build and encourage grassroots momentum and to give supporters important decision-making power. However, grassroots autonomy occurred within boundaries and central oversight led the campaign and its supporters towards common milestones. As a result and unlike pure grassroots upstarts, these campaigns have all scored clear political or economic victories, often at the same time.

These campaigns achieved success, we believe, because of their ability to open up to the new cultural forces which favor open-ness and grassroots power but also because they framed and strategically directed this power towards concrete policy outcomes. In short, they married new power with old.



The path to directed-network campaigning

With a special focus on directed-network campaigns, we sought to isolate the strategic and operational approaches that were common to all high performing examples in our case studies. As they are recurrent throughout our study group, our logic was that these approaches are universal enough to be adapted and implemented in different settings and towards different causes.

“At Not1More we called our methodology ‘open source campaigns.’ There is a pattern that’s forming that unlocks a different form of potential for truly bottom up, democratic change-making. This breakdown of emergent strategies for collective change is much needed.”

- Marisa Franco, Director, Not1More Deportation Campaign.



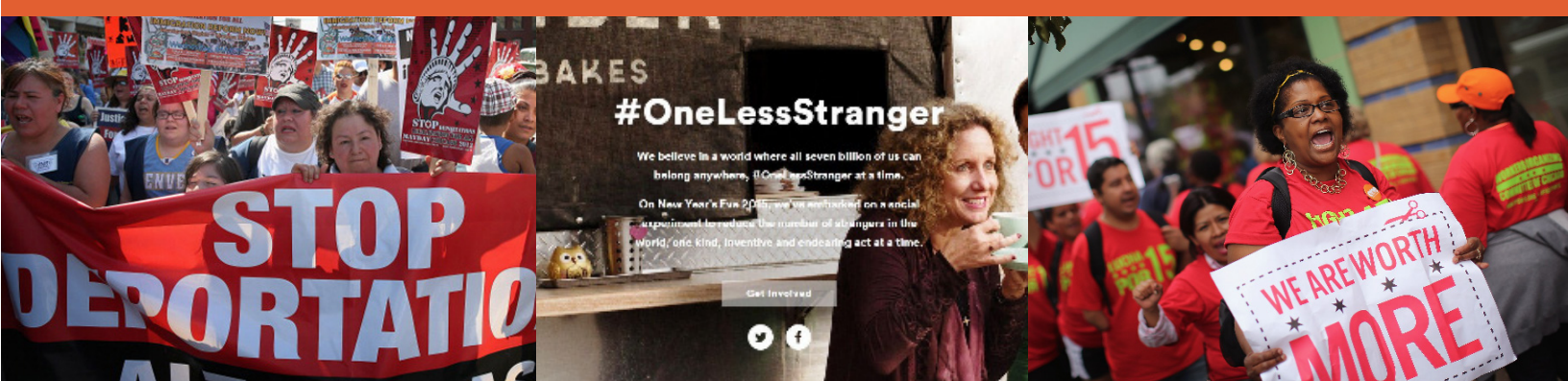
The approaches we highlight are grouped into four separate campaign orientations that we call principles in this report.

The first two Principles, Opening to grassroots power and Building network hubs represent horizontal approaches that leave more power and agency with supporters and build more diverse cross-movement networks around causes.

Principles three and four, Frame a compelling cause and Run with focus and discipline pertain more to the framing, management and proper execution of campaigns – typically areas that rely on the oversight of a central leadership body.

Understanding and implementing approaches from each of the four principles will allow organizers to set up and run directed-network campaigns and in this way apply a model that is consistently achieving high impact and force amplification in today’s challenging advocacy landscape.





Section 2: Principles of directed-network campaigning

Principle 1: Opening to grassroots power

“Looking back from the White House, most progressive advocacy organizations were respected but not always weighted the same. There was usually a calculation about people who are manufacturing support for an issue rather than those who are listening to and mobilizing members.”

- Greg Nelson, Formerly with the Office of Public Engagement, The White House.

Judging by the practices of all top innovators in our study group, true grassroots participation in advocacy campaigns is now a non-negotiable success factor. For one thing, it is essential as a sign of popular support, something that demonstrates power to the intended targets of a pressure campaign. Governments and corporations now cringe when they know that a critical mass is mobilized behind demands and mobilizing that mass can certainly be easier in the digital age when the right approaches are applied.

In a network society, campaigns that mobilize grassroots participation also go much further than grassroots campaigns because they tap into widespread cultural expectations, especially among millennials. Today's empowered free agents and individuals, when called to support a cause or movement, quite simply want to contribute more and have more say over how things are done. Campaigns which give supporters an active role and freedom to customize generate a lot more commitment and enthusiasm and often gain precious insights and innovations by tapping into the collective intelligence of their crowd.

Distributing agency

This approach essentially entails opening leadership and some management responsibilities to a campaign's larger network of core supporters. The fact that many supporters now have the will and the drive to self-start local campaigns on their own is an enormous asset for those who take advantage of this new cultural reality because it enables movements to scale well beyond the financial and geographic limits of their core staff structure.

Typically, groups that run on this model carefully outline roles and responsibilities for their distributed leadership, prepare a digital “toolkit” for self-starters and convene regular check-ins led by central staff to ensure that problems are addressed and that the overall movement is aligned.

This approach has notably been perfected by anti-street harassment network Hollaback!, which has activated chapters in 26 countries and equips its voluntary local leaders with vision and skills thanks to a well-developed webinar training program³. Currently, distributed agency is also a strategy successfully implemented by the Bernie Sanders presidential campaign, 350.org, the #Not1More movement and the Tea Party.

“Under a command and control structure there is typically a limit to what you can ask of people and to their commitment because all the responsibility of thinking what to do next remains with a small center. In a distributed approach, when more people are more invested, you have more people taking ownership over something and driving it.”

- Michael Silberman, Global Director, Mobilisation Lab at Greenpeace

Allowing for customization and adaptation

While many nonprofits and NGOs have adopted marketing practices from the corporate world in which unity of message and staying “on brand” are essential, the successful practices of several progressive campaigning groups are pointing in the opposite direction.

Groups which allow their supporters to customize and adapt campaign messages and visuals to better suit their local contexts are showing that flexibility pays off in higher engagement rates. They succeed because they are building networks across geographic boundaries that better respect the distinct differences in culture and approach at the local level.

350.org, which runs several global campaigns on climate change in 188 countries allows its local chapters to manage their own identities, messaging and content⁴. Freedom to customize and build distinct local identities is also enabled by the #Fightfor15 and the tar sands campaign, as well as the global network of Hollaback! chapters.



Gathering ideas and content from your crowd

Campaigns that actively consult their audiences and draw on their collective intelligence have access to new assets and power. What would have been an onerous task in the past is now a distinct strategic possibility in an age where two-way communication at the group level is relatively cheap and easy.

“Deeply transformative, world-changing work is next to impossible to find funding for but people power is an infinite resource. The role of a nonprofit is to give people tools and then to get out of their way.”

- Emily May, Executive Director, Hollaback!

Active audience input and listening can take the form of polling supporters on future priorities, letting supporters suggest and initiate their own online petitions, and allowing supporters to generate their own digital campaign content through images and other forms of testimonials. Campaigners that have adopted one or more of these tactics have benefitted from a more involved supporter base, which sees its own story and voice out in front of the movement.

Online activist network Avaaz.org, besides its longstanding member-initiated petition program, also runs a yearly polling program with its over 40 million person audience base to determine strategic directions for the coming year. Other groups implementing extensive audience listening and supporter-led petitions include Sumofus.org, Moveon.org and Groundswell.

Showing your people power

A wide base of grassroots support can be a powerful campaign weapon as well as a self-reinforcing motivational asset if support numbers are made publicly visible to campaigners and pressure targets alike. Corporate or government targets are vulnerable to large waves of public dissatisfaction, especially when this happens in view of larger audiences. Alternately, supporters are inspired and reassured when they can see that they are part of a much larger movement.

Showing people power often begins with online petitions, which gather numbers into the tens or hundreds of thousands until there is sufficient visible support to anchor further online and offline actions around the campaign issue. Alternately and often in addition, campaign supporters are often directed to “swarm” a government or corporate pressure target through online and offline messages and voice their collective desire for social change.



Using people-power as a lever for change, online advocates Sumofus.org typically gather a critical mass of their nine million members around a case of corporate misbehavior through online petitions. Once this process is set in motion and sufficient buy-in has happened, they will organize offline actions to support the petition and drive supporters to swarm their corporate targets both online and in real space at occasions such as board meetings. Similar tactics are employed by Avaaz.org, Moveon.org, #Fightfor15 and Greenpeace.

Principle 2: Cross-movement network hubs

“Whoever masters the network form first and best will gain major advantages”

- John Arquilla, David Ronfeldt, In Athena's Camp: Preparing for Conflict in the Information Age.⁵

To move the needle on an issue in previous decades, common practice was to create a cause-based organization and to build membership and resources through which pressure could be channeled. The ability to create social change in this model was closely tied to the process of growing an institution. With the new possibilities of rapid collaboration and indeed the benefits of working on an issue as a group rather than a single top-down body, network building has emerged as an attractive and efficient new way to build power. Many of the successful campaigns we studied aligned with larger cause networks and devoted considerable energy towards supporting them.

Various aspects of a network society contribute to lowering the transaction costs of building and maintaining wider alliances. The agility of modern communications, for one, allows for rapid appropriation and repurposing of cause messaging by others. On an individual level, affinity with causes rather than organizations⁶ encourages people to rally around issues regardless of previous institutional loyalties. It is therefore less important for a single group to “own” a cause and more important that the cause itself find wider resonance with allied groups.

Campaigns which have succeeded in connecting a wide range of networks and have directed them to collectively exert power have benefitted from the amazing force amplification that results from this approach. Furthermore, from the perspective of corporate or political targets, the pressure coming simultaneously from a diverse patchwork of constituencies, rather than a single interest group, can be formidable enough to drive rapid concessions.



#Hashtag, not brand

Drawing on the works of evolutionary biologist Richard Dawkins, several campaign theorists⁷ have proposed that the most powerful world-changing ideas in today's connected societies should be created as "memes," meaning free-floating packages of thinking and branding that "infect" large numbers of people with a new way of thinking about social problems.

Though many groups yearn to launch campaigns that are taken up by others, letting go of brand identity and ownership is still very difficult. When a campaign is clearly branded as an organizational initiative, there is little chance that it can be adopted more widely. When the campaign is designed to be open from the beginning, to function more like a hashtag and a shared rallying point for a wider coalition of independent actors, this enables a shift from cause campaign to wider social movement, and the result is often much greater impact and reach.

When the SEIU decided to defend the interests of low-paid workers in the retail and fast food sectors, it went well beyond its own unionized membership to create a wider campaign around decent minimum wages for all workers, the Fightfor15, which has since been picked up by groups fighting economic inequality and racial injustice. Few people today even know #Fightfor15 was first created by the SEIU. A similar open approach to campaign ownership has been led by the Sanctuary Movement fighting deportations and the diverse network opposing the Keystone XL pipeline.



“Honeycomb style networking allowed everyone to “own” the movement. A centralized hierarchical structure is more western and top down. The struggle is to be inclusive, which is a more Indigenous style of network, while trying to keep the original mandate in focus, so newcomers don’t come in and completely change the meaning and focus”.

- Leena Minifie, Consultant and artist, Idle No More.

Convene, connect, serve

Managing large networks requires focused central management of communications and coordinated actions between the different nodes and network outliers.

Staff here must operate like air traffic controllers making sure that information is flowing across the network and that moments of shared communication and mobilization go smoothly. They must also map movement assets and identify critical weaknesses or gaps, filling them with shared services, oftentimes digital and PR, so that a larger politically salient narrative breaks through and that network synergies are properly made use of.



“Creating a network (just like industry had) helped create a shared sense of purpose, shared key information and strategies, and created a larger narrative that stood out and eventually won the day. Groups working on their own simply couldn’t have had as much impact as they did together in a coordinated fashion.”

-Tzeporah Berman, Senior Advisor, Tar Sands Campaign.

For several years running, 350.org has managed a diverse international network of self-starting and self-organizing local groups that mobilize around various climate-related campaign moments. To hold it all together, a central communications system using online groups, conference calls and occasional in-person meetings has ensured that information flows between all groups and that energies are directed towards common goals. Similar approaches were employed by the over 60 groups participating formally in the Tar Sands Campaign and the constellation of local groups around the Fightfor15.



Cross movement boundaries

The art of building and maintaining powerful and resilient campaign networks requires empathy and respect for different points of view, theories of change as well as messaging and organizing approaches. Finding common areas of interest and creating mutually beneficial exchanges between often vastly different groups or movements is a core competency of many of the most successful campaigns in the study group.

In a world of hyper-professionalized campaigns and slick PR coming at the media and decision makers from all sides, campaigns that find and lift up those who are most directly affected by issues find their message stands out and their movement grows. Beyond individual stories, network builders must actively seek out “unusual suspects”, groups that are not natural allies but are deeply impacted by campaign issues. Taking the time to reach beyond traditional circles adds richness to the movement but requires acute respect of different power and privilege issues that many single-issue professional campaigns continue to struggle with.

To re-boot the climate movement in the U.S. organizers knew they had to go well beyond core supporter groups in the environmental sector to build greater legitimacy and power. The network that successfully fought to stop Keystone in the US and the tar sands in Canada ended up including groups as diverse as Native Americans (First Nations in Canada) and ranchers, united by common concerns. Large intersectional networks are also being built by the climate movement, through the larger notion of “climate justice” and the Fightfor15, which has found common ground with the Occupy and BlackLivesMatter movements as described above.



“Networked campaigns help us to practice new kinds of experimentation, coordination, and collaboration. With practice they strengthen our capacity for collaborative action and over time help us build functional self-organizing networks that result in a smarter, stronger and more powerful progressive movement capable of tackling our most daunting challenges.”

-Jodie Tonita, Social Transformation Project.

Principle 3: Frame a compelling cause

Organizational loyalty is fast eroding and this has deep implications for nonprofit campaigners. In the past, organizations could count on their membership to follow by reflex when they sent out a call to action. Today’s overstimulated potential supporters, especially millennials, adopt causes and not institutions, when they decide to invest their time in social change.⁸

The need to constantly recruit a new follower base puts pressure on campaigners to become highly adept at winning hearts and minds in an information environment that is already greatly crowded with cause appeals. To do this effectively, they must rapidly provide their audiences with a “why should I care?” statement. Great storytelling that taps into values and cultural mythology becomes a crucial skill in this context.



Storytelling and issue framing is the way to convert spectators to supporters rapidly. Compelling stories, however, need to answer to several criteria. They must touch deep primal concerns shared by the audience and also be framed in a simple and believable way, with a path to victory and a role for the participant.

Focus on action-worthy problems and solutions

The challenge with engaging people to help solve many of the world's problems is that such problems are increasingly complex and can feel overwhelming. A great number of the current advocacy initiatives being promoted are driven by funding or research imperatives and ask the public to support an approach that is too arcane to grasp, too single-issue to make a difference, or to join a fight that seems hopeless from the beginning.

“First things first. Does the problem you are trying to solve really matter to anyone? Is the solution you propose realistic and effective?”

-Marisa Franco, Director, Not1more Deportation Campaign.

By definition, an “action-worthy”⁹ problem is one that connects instantly with the shared concerns of a wide (or niche) audience and motivates them to put energy into finding a solution. When such problems are pitched as causes, however, they must be accompanied with a clear and compelling “Theory of Change,”¹⁰ that is, a solution path bold enough to create big change but achievable in real world conditions with a role that each supporter can play in making it happen. Often, this requires cutting down wicked problems into manageable and “win-able” pieces.

When taking on the issue of immigration reform in the U.S., Not1more Deportation organizers realized that the movement to address it needed to be reframed around deportations, a much more pressing and solvable pain point and a powerful trigger of emotions for the community of supporters. Similar motivations pushed many climate activists to focus on stopping pipelines like Keystone XL as a step towards reducing emissions.



Employ cultural storytelling

Stories that connect with deep emotional currents and cultural archetypes shared by a wide group of supporters are assured a good base of energy to draw upon. Strong emotional triggers can include fear for one's own security and wellbeing but they can also extend to one's wider community through feelings of injustice or indignation.¹¹ Such storytelling goes even further when those directly affected by injustice or environmental crises are delivering their testimonies themselves.

Letting supporters speak up for their own passions and sources of anger and frustration is often the best way to discover which causes are driven by strong emotional currents. At a time when it is easy to listen to audiences for cues and professional public opinion and message framing research is widely available to most causes, campaigns that draw their direction from this data have more chances of being positioned in ways that will drive an energized movement.

To find out which issues and stories are closest to the hearts of their 37 million members, the AARP has set up a research department dedicated to polling their audience. In this way, they can be sure that each one of the campaign issues they devote resources to will have strong pickup and resonance with their base. Avaaz.org, Sumofus.org, Greenpeace, Upwell and Groundswell all run their own versions of a research department informed by member-led petitions and online polling.

Create oppositional framing with heroes and villains

One of the fastest and surest way to mobilize supporters to join is to frame an issue around the threat of a common enemy. Though most issues are multifaceted and complex, there is often a “villain” to be found, if campaign strategists seek to find one. Many of the successful campaigns we studied took this a step further, ensuring a specific company or individual was turned into a “super-villain” and directing a significant amount of attention towards their unacceptable behavior.

Super-villains in oppositional framing are typically politicians or corporations that have tangibly contributed to making the problem worse and can justifiably be targeted with pressure to change their policies. Often they walk right into the role of the bad actor and give campaigners plenty of fresh material to highlight. Even though the villain may only be part of the problem, forcing them to concede will be perceived as a clear victory by all campaign supporters.

As important as the villain is in this framing, heroes complete the picture.

Many of today's most successful campaigns employ a storytelling strategy that casts their grassroots supporter base as the heroes in this story and give them an active role in taking the villain to task. The NGO is the mentor in the story, not the hero, and the language of "you" taking action and eventually prevailing replaces "we".

For years, Greenpeace has framed specific super-villains as the focal points of its major pressure campaigns and has directed campaign energy at these targets, often multinational corporations. Oppositional framing is also employed by groups such as 350.org in its campaigns against Exxon and the Fightfor15 when it focused on the wage policies at Walmart and McDonald's.

Multi-channel masters

At a time when attention spans are now increasingly short¹³ and divided among a vast constellation of online and offline media, often divided by demographic or age, campaigners must orchestrate their most important content flow across many channels simultaneously to make sure their story gets blanket coverage.

The multi-channel approach requires planning and resourcing to make sure that content reaches not only mainstream-media outlets, which have lost market share but are still dominant with public-opinion makers, but online and alternative media, while also being pushed through "owned channels" to an organization's existing supporter base. At the same time, to be effective in social media, key messages must be tweaked to become something that regular people feel compelled to share online, thus creating new waves in people powered media.

The campaign to stop the growth of Canada's tar sands applied a multi-channel approach to shift the national conversation around this carbon-heavy resource. Campaigners here set up high-level mainstream PR, a digital communications strategy targeting alternative media and a network-based content sharing approach that engaged partners including NGOs and First Nations. Other organizations that have mastered the multi-channel approach include the AARP, Greenpeace and the Fightfor15.



Principle 4: Run with focus and discipline



“With Greenpeace’s open approach to planning, we’ve seen a tremendous difference in how a campaign unfolds and how effective it can be in terms of engaging people when you do things like talk to people in advance or prototype ideas with them before you launch something.”

-Michael Silberman, Global Director, Mobilisation Lab at Greenpeace.

Advocacy campaigns are often trying to exert pressure on targets that are much better resourced, often by a factor of 10 and sometimes 100 to 1. When a government or corporation launches a counter-campaign through PR and mass media channels, activists must marshal their staff, budgets and content wisely. When possible, this calls for leadership by seasoned campaigners with a keen sense of timing, relationships and resource management.

Besides field experience, there are now other ways that campaigning organizations can make informed decisions about which advocacy tactics to deploy and when to deploy them. With the right platforms and listening processes, campaigners can now draw on testing, data modeling and product development approaches, often drawn from the world of for-profit technology firms.

Running much like tech startups, data-driven campaigners run small experiments on audience segments to optimize their campaign messaging before launching to a wider audience. They also track performance carefully and learn valuable lessons on timing and campaign growth patterns, constantly improving processes from one deployment to another.


Be agile, test often, fail fast

As campaigners seek to optimize their approaches and make the most of their typically meager resources, they are turning more and more to the tech world for inspiration where startups have developed interesting methodologies to address these same challenges.

Taking a product development approach to campaign design,¹⁴ organizers are led to work on rapid “iterations” of their plans and messaging with daily status check-ins between point people in various departments. Using test audiences and feedback mechanisms to gather input, modern data driven campaigners can “test run” framing elements with target audiences and adjust for maximum impact when the campaign will be fully deployed. When campaign “prototypes” fail to generate engagement, campaigners must also be ready to let go of their often precious held ideas so they can focus on what is actually working on the ground.



Behind the online petitions that millions have signed through Avaaz.org and Sumofus.org are extensive tracking systems that are used to perform A/B testing of campaign messaging on sample audiences. They then bring performance analytics back to campaigners who only dedicate full resources to campaigns that have demonstrated traction in their test runs. Similar systems are also run by Groundswell through its member-initiated online petition platform and Moveon.org, arguably the first group to have developed a “culture of testing”¹⁴.



“The culture of testing creates a new feedback loop that promotes organizational learning. It helps us to try new tactics, evaluate new strategies, and listen more effectively. If you aren’t testing, then you aren’t listening. And if you aren’t listening, how can you expect to adapt to a changing media and political environment?”

- David Karpf, Associate Professor, George Washington University School of Media and Public Affairs.



Focus your energy on key moments, organize vs. mobilize

A common cause of campaign failure is the exhaustion of resources and social capital by running in a state of constant high urgency, and then being unable to focus a campaign’s full power on a target when a tangible opportunity for a win finally appears. This typically occurs when there is no conscious division between an “organizing” phase versus a “mobilizing” one.¹⁶

When organizing, a campaign is steadily building relationships, resources, trust, and power. It is a time for experimentation in campaign tactics, narrative development, as well as network and base building. In this model, mass mobilization, major advertising buys, and other avenues that “spend” your power are largely withheld until a clear opportunity for a “winnable moment” on the issue arises. Determining the right moment for mobilization centers around the emergence of winnable moments during which stored campaign capital can be spent in an intensive but time-limited push that creates an unstoppable force.

“You can’t always be mobilizing. Without a clear end date or win state, you’ll just burn through people and build a machine you constantly need to feed just to stay at the same scale. Hold back your power until you’re at one of those 1/0 state moments, then go for broke.”


- Geoffrey MacDougall, VP Advocacy Consumer Reports, former VP Mozilla Foundation.



Though movements for a free and open Internet have been fundraising and building networks of support since the late nineties, they only rally the active participation of their allies during moments of truth such as milestone dates for proposed legislation which would lead to a more restricted and commercially dominated Web. In the fall of 2014, as the FCC considered regulations that would give more Internet bandwidth to telecommunications giants, the battle for “net neutrality” mobilized the support of 40,000 partner websites whose calls to action were heard by 2 million supporters and forced public officials to back down.

Play the long game and be resourced for the challenge at hand

Unseen by most observers, many of the most successful major advocacy campaigns we studied spent years building up power, scaling their networks and honing their story away from the limelight, before they broke into national consciousness and scored dramatic victories. There are as few “overnight success” stories in the world of campaigning as there are in the arts.



“There is a myth that creating deep-seated social change is somehow all about winning. Those are the stories we see in the media, but any good organizer will tell you that organizing is all about resilience. You’ll get hit in every direction you can imagine - but if you keep getting up, and trying again, eventually you’ll win.”

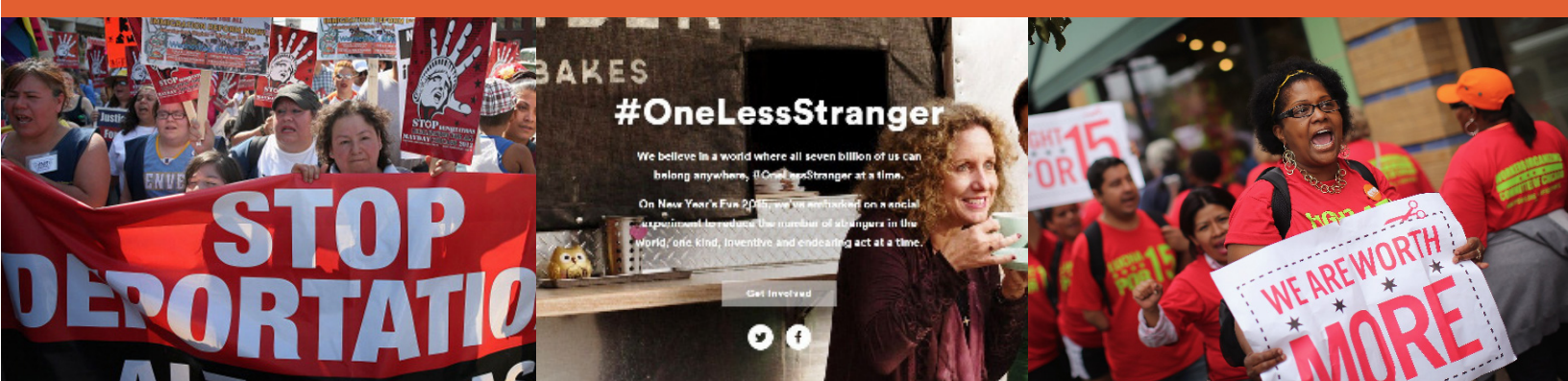
- Emily May, Executive Director, Hollaback!



At the same time, many organizations campaigning on multiple fronts and their funders are too impatient with certain programs when they do not produce intended short-term results. They tend to scrap big campaigns just as they are getting to a point where crucial relationships and scale are kicking in. If the issue being addressed is complex and entrenched, organizers must plan to fight for years rather than months and have the necessary resources and support put aside to allow them to tough out a fight over the long haul.

Though its surprising victories such as forcing Walmart and McDonald’s to raise minimum wages drew major media attention in 2015, the Fightfor15 campaign had in fact been active in many cities across the U.S. since 2012. It took over two and a half years of sustained campaigning and considerable organizational financing to get to a place where this movement was a force to be reckoned with. Similarly, the Keystone XL campaign, which began in 2008, spanned a Presidential election and other major protest milestones to finally culminate in Obama’s veto of the pipeline project in late 2015.





Analysis and recommendations

Our professional experience tells us that most advocacy initiatives are programmed to fail because they arise in environments where campaigning excellence is no longer a priority.

Many of the more established organizations we encounter are hardened into hierarchies that have lost touch with their responsive roots. In their strategy and operations, they have become closed off, top-down and policy driven. With a focus on their own research and policy imperatives, they have also forgotten the art of disciplined campaigning, of fighting to win. They have come to believe that their good ideas can somehow change the world by themselves.

With the institutional tendencies noted above, a good number of modern nonprofits are out of synch with two important cultural forces that define campaigning practice more than ever these past few years: the various effects of a network society on communication and social organization and the imperatives dictated by increasing complexity and competition for mindshare in an information-saturated world.

In a series of works dating back to the 1980s, eminent sociologist Manuel Castells outlined the rise of the network society and its impacts.¹⁷ With technology and culture evolving in lockstep, the emergence of networks over hierarchies as a new organizational form was seen to have profound effects on our sense of individual identity and power as well as our group behavior and our relationships to traditional centers of power.

We see the effects of network society much more clearly today in the erosion of organizational loyalties, the drop in institutional trust, the increasing individual desire to choose, customize and co-create. All are manifestations of this new paradigm theorized decades ago. These



new desires and expectations have clear implications for any campaign strategy that seeks to mobilize people towards a common goal.

Then, there are the new constraints that complexity and scarcity bring to the marketplace of ideas. Consider that there are now more advocacy groups than ever sharing a smaller and smaller base of funding,¹⁸ that public attention spans have been dropping¹⁹ as more causes compete for mindshare and that communications channels have multiplied.

Competitive challenges require greater focus and discipline. They raise the bar for the kind of concepts and execution necessary for a campaign to break through the clutter. They also impose the need to measure out campaign resources carefully. This is where savvy central strategic leadership finds its place in the new advocacy landscape.

Given the above, any progressive campaign launched today needs to align with new cultural trends identified in this report to amplify its influence and also needs to execute tightly to compete for mindshare. The directed-network campaigning model that emerges from our report provides a clear and simple model to build on for organizers wishing to give their campaigns the best chances of winning. The incentives are clear but changing old practices and attitudes is never easy.



Three ways to start directed-network campaigning right now

None of the campaigns we studied reflected all of the approaches highlighted above and the model is not meant to be strictly prescriptive. However, if you are excited by the potential of applying elements of directed-network campaigning to enhance your organization's force amplification and impact, here are three things you can do begin to integrate them into your work, starting right now.



1

Start by knowing where you are: Convene a team of like-minded colleagues who all “get” this new world, are concerned about your current limitations and excited about change. Using this report as a checklist, run your institution or most active campaign through the directed network campaign model, giving yourself a score of 1-5 based on how well you embody each of the principles and approaches. Without an accurate map of this new terrain you are fumbling around in the dark, overwhelmed and with nowhere to start. With a passionate change team of internal innovators and an accurate map, you're armed to start your own internal campaign for change.

2

Shine light on what's working, shore up what's not: Chances are the places where you will find the most vitality and success in your campaigns already line up with many of the approaches in the directed network model. Start by identifying and sharing stories about which tactics are showing solid results and put your attention there to reinforce the approaches within your organization. Then, look at where your work is the weakest. Without overly focusing on problems, look deeper at the underlying issues of culture, structure, values and leadership that are keeping you from becoming better at this. Knowing what you're already good at and what will still prove challenging is a solid foundation for a realistic innovation plan.

3

Boldly apply it to your next campaign: Whether you run it as a secret skunkworks or above board with the approval of directors and funders, it's important to begin to quickly bake some of these principles and tactics into your next, or even existing, campaigns. Don't try to do 10 new things at once. Grow muscles that you already have, and avoid (or address, if possible) the areas you know will be a no-go zone for your institution. Execute well on the innovations you choose, and closely track metrics. Finally, be patient. Transformation doesn't happen overnight. When you're starting to grow your internal movement of converts and gather a basket of stories of impact from new approaches, you're ready to implement these innovations more widely.

Of course the most effective way to transform how your institution runs change campaigns is to run a high profile change effort that engages front line staff, middle managers, and senior leadership in a more wide ranging conversation about what real impact means for your work in the 21st century and how aligned your key staff and functions are with what is showing the most results today (ie. the approaches identified in this report).

Ultimately, this work is about transformation – rebooting our important social change institutions to be more relevant and effective within our current external environment, which is fundamentally different from the era most institutions were founded in and are still grounded in.

The work of transformation is never easy and the same systems barriers that exist in our external work exist within our institutions, our leadership and ourselves.

The world now desperately needs us to be successful helping it shift to a more just, sane and sustainable direction. We wish you courage, clarity and luck on your difficult but immensely rewarding path as an effective 21st century change-maker.



APPENDIX A: Sources of inspiration

The authors would like to thank the following people, as well as the big beautiful Web of Change community, whose insights and feedback were valuable throughout the creation of this report.

Ben Margolis / Cameron Fenton / Carol Newell / David Karpf / Derrick O'Keefe /
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Marisa Franco / Micah Sifry / Michael Silberman / Michelle Reyf / Rosanne Haggerty /
Sara Shor / Ted Fickes / Thelma Jones / Todd Wolfson / Tzeporah Berman

The following were books, blogs, articles events and communities we found useful and recommend to those who want to dig deeper into new campaigning strategies:

Books

A Lever and a Place to Stand: How Civic Tech Can Change the World,
edited by Micah Sifry and Jessica McKenzie. Personal Democracy Media, 2015.

Beautiful Trouble: A Toolbox for Revolution,
a collaborative effort by over 70 contributors. OR Books, 2012.

Digital Rebellion: The Birth of the Cyber Left,
by Todd Wolfson. University of Illinois Press, 2014.

Networks of Outrage and Hope: Social Movements in the Internet Age,
by Manuel Castells. Polity, 2012.

The MoveOn Effect: The Unexpected Transformation of American Political Advocacy,
by David Karpf. Oxford University Press, 2012.

This is an Uprising: How Non-Violent Revolt is Shaping the Twenty-First Century,
by Mark Engler. Nation Books, 2016.

Winning the Story Wars,
by Jonah Sachs. Harvard Business Review Press, 2012.



Articles

“Understanding ‘New Power’,”

Jeremy Heimans and Henry Timms, Harvard Business Review, Dec. 2014.

<https://hbr.org/2014/12/understanding-new-power>

“How We Make Change is Changing: Open Source Campaigns for the 21st Century,”

Marisa Franco, Medium.com, June 22, 2015.

<https://medium.com/organizer-sandbox/how-we-make-change-is-changing-part-i-5326186575e6#.r6cwbimmw>

“The Secret of Scale,”

Peter Murray, Stanford Social Innovation Review, Fall 2013.

https://ssir.org/articles/entry/the_secret_of_scale

“The Mobilisation Cookbook: A Greenpeace Guide to Cooking Up People Powered Campaigns.”

<http://www.mobilisationlab.org/mobilisation-tools/the-mobilisation-cookbook/#.V0WvOJEr-JN0>

Blogs

Civicist

<http://civichall.org/civicist>

MobilisationLab at Greenpeace

<http://www.mobilisationlab.org>

TechPresident

<http://techpresident.com/>

Waging Nonviolence

<http://wagingnonviolence.org/>

Communities/ Events:

Netroots Nation

<http://www.netrootsnation.org/>

Personal Democracy Forum

<http://go.personaldemocracy.com/>

Web of Change

<http://www.webofchange.com/>



APPENDIX B: Endnotes

1. “Network society” is a concept most notably developed by sociologist Manuel Castells in [The Rise of the Network Society](#) 1996. Castells argues that networks are rapidly becoming the dominant model for social organization going well beyond the digital to influence individual empowerment as well as economic and political power building and interactions. A shorter summary of Castells’ thinking is available in his 2000 article, “Materials for an exploratory theory of the network society.”
2. See above.
3. Hollaback!’s leader training program is further explored in the following article on Mobilisation Lab: “[The 350.org and Hollaback! approach to distributed campaigning.](#)”
4. 350.org’s open customization approach is best documented around the People’s Climate Marches it helped organize. See: “[Civic Tech and Engagement: How Network-Centric Organizing Made the People’s Climate March](#)” but also this article for the potential pitfalls of the approach: “[The Unfinished Business of the People’s Climate March.](#)”
5. This quote is drawn from a RAND Corporation think piece, part of a series exploring coming threats and new realities brought about by new networked social patterns that was commissioned by the U.S. National Defense Research Institute. Ironically, these papers remain some of the most thorough and most cited explorations of how network society creates new possibilities for activists and advocates. For a full list of publications, see: <http://www.rand.org/search.html?query=netwar>
6. On dropping institutional loyalty among millennials, see the [2013 Millennial Impact Report](#) which observes that millennials “...passionately support causes rather than the institutions working to address them.” The report is summarized in this [Philanthropy News Digest article](#).
7. Memes as tools in activist campaigning are explored throughout Kalle Lasn’s book, [Culture Jam](#) (1999) and also in [Beautiful Trouble’s](#) online resources: [Theory: Memes](#).
8. See note 6.
9. “Action-worthy problems and solutions” is presented as a concept in a two-part series of articles titled “[How we Make Change is Changing](#)” written by Marisa Franco, B Loewe and Tania Unzueta.
10. A full explanation of the Theory of Change frame and how it applies to social change work is presented in “[The Power of Theories of Change](#)” published in the Stanford Social Innovation Review.



APPENDIX B: Endnotes

11. Passions as primary drivers of new social movements is a theme explored throughout Manuel Castells 2012 title, Networks of Outrage and Hope: Social Movements in the Internet Age.
12. The role of the individual activist as the hero of the grand narrative is covered in Jonah Sachs' Winning the Story Wars.
13. On attention spans, research has suggested digital media era has begun to alter attention spans and even the structure and functioning of our brains. The book The Shallows: What the Internet is Doing to Our Brains, is an excellent source. The book is an expansion of the argument Carr made in a 2008 Atlantic article, "Is google making us stupid?"
14. For a good presentation of the product development approach to non-profit campaigning, see: "Product teams: The next wave of digital for NGOs" on Mobilisation Lab.
15. The "culture of testing" is dealt with in detail in David Karpf's 2012 title: The MoveOn Effect: The Unexpected Transformation of American Political Advocacy.
16. The "organizing vs. mobilizing" question is explored more fully in our blog post: [Organizing vs Mobilizing – focusing your campaign to win](#).
17. See note 1.
18. On competition in the nonprofit sector, see: "Effects of Nonprofit Competition on Charitable Donations," by Bijetri Bose, Department of Economics, University of Washington, Seattle. The author notably observes that: "Charitable donations, dependent on the economic realities, have not grown at the same pace as the number of charitable organizations during the past decade, making competition for the charitable dollar a pressing issue for the nonprofit sector."
19. See note 12.



APPENDIX C: Groups studied

Organization/ Movement	Campaign(s) and or Organizational Aspects Studied	Research Method
100,000 Homes	End Homelessness campaign	Worked directly
350.org	International Chapters, Divestment, People's Climate March, KeystoneXL campaigns	Worked directly + Interviews
American Automobile Association	Lobbying campaigns	Literature review
American Association of Retired People	Social Security	Literature review
Adbusters	Buy Nothing Day, Occupy Wall Street kickoff	Worked directly + Interviews
AirBnB	Member mobilization for lobbying	Literature review
Avaaz.org	Various campaigns and organizational practices	Worked directly + Interviews
Ben and Jerry's	Cause campaigns mobilizing customer base	Literature review
Bernie Sanders Campaign	Distributed organizing of volunteers in campaign effort	Literature review
BlackLivesMatter	BlackLivesMatter	Literature review
Change.org	Various	Interviews
ColorofChange	Alec, others	Interviews
Consumer Reports/ Consumers Union	End Robocalls, Stop Comcast Merger, various	Worked directly
CREDO	Iran war campaign, others	Interviews
Daily KOS	Organizational structure and various campaigns	Literature review
David Suzuki Foundation	Blue Dot Tour	Worked directly
Democracy for America	Distributed organizing	Literature review



Facebook	“social good” campaigns	Literature review
Fight for the Future and others	Net Neutrality	Interviews
Food and Water Watch	Fracking bans	Worked directly
Free Press	Save the Internet, others	Worked directly
Service Employees International Union and more	Fightfor15	Interviews + literature review
Global Social Justice Movement	Summit protests of the late 90s, 2000s including Seattle WTO protests	Direct participation, interviews
Greenpeace International	Volkswagen, LEGO+Shell campaigns, Mobilisation Lab	Worked directly + interviews
Groundswell	Sanctuary Movement 2014	Interviews
Hollaback!	Distributed organizing	Interviews
Idlenomore	Ongoing First Nations advocacy	Interviews
LeadNow	Federal election, FIPA, various	Worked directly
MoveOn.org	Organizational practices, member-led petitions and various campaigns	Literature review
National Rifle Association	Lobbying to oppose gun control	Literature review
Not1More	Not1More	Worked directly
Occupy Wall Street	Occupy Wall Street	Interviews, literature review
Open Internet	SOPA/PIPA, Net Neutrality	Interviews, literature review
Patagonia	Employee activist program	Literature review
Pull Together	Fundraising campaign	Worked directly
Rainforest Action Network	Various campaigns	Worked directly



Sierra Club US	Member and chapter model	Interviews
SumOfUs	Organizational practices, fundraising + Newmont Mining, Enbridge Islands, and Starbucks campaigns	Interviews
Tar Sands Solutions Network	Multiple campaigns over 4 years	Worked directly
TckTckTck	Copenhagen climate summit coordination	Worked directly
Tea Party	Organizational structure and group tactics	Literature review
Uber	Member mobilization for lobbying	Literature review
United Nations Foundation	Nothing But Nets	Worked directly
US Chamber of Commerce	Various campaigns	Literature review
Which?	Various campaigns	Literature review
Wikimedia Foundation	Fundraising campaign	Literature review
World Wildlife Foundation	Virunga	Interviews



Let's Talk!

If your institution is ready for change,
we'd love to connect.

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