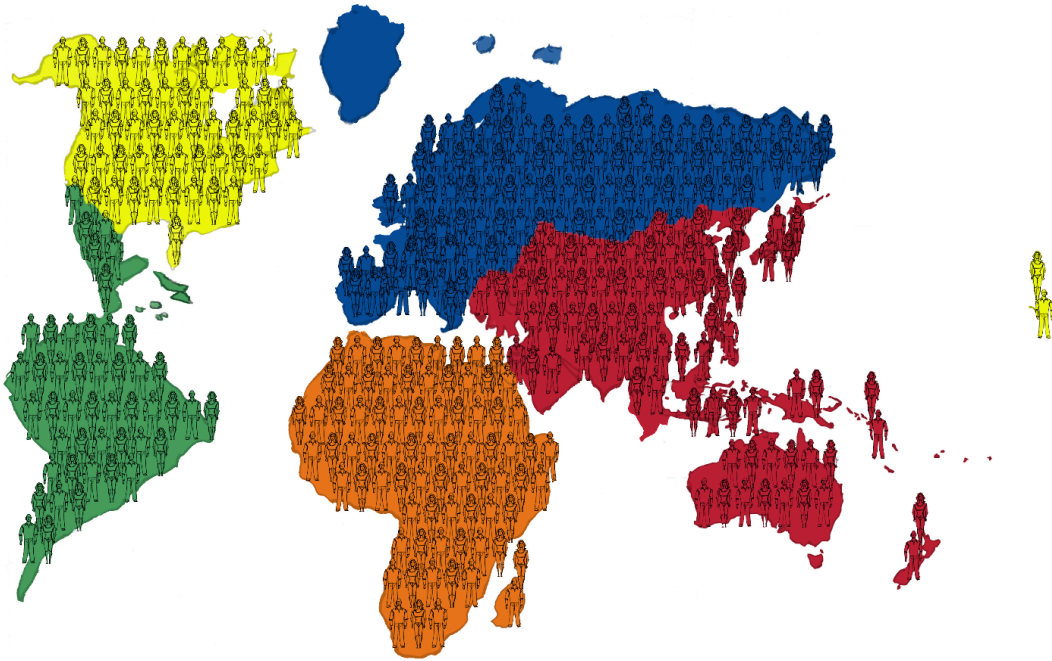# "CAMPAIGN PLAYBOOK"

Introduction

Welcome to the At-Large Campaign Playbook. The purpose of the Playbook is to act as a resource for At-Large volunteers, looking to execute a member mobilization for feedback, education or message amplification.

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At-Large as a Grassroots Organization

At its core, the At-Large Community is a grassroots organization, with its Regional At-Large Organizations (RALOs) at the center. The RALOs elect the majority of the members of the At-Large Advisory Committee (ALAC) as their representatives to the ICANN community, while focusing on "outreach and engagement" in their region. RALOs are made up of institutional members, called At-Large Structures (ALSes) and individual members and while some become involved directly in the ICANN community, the majority are engaged in their own agendas and are involved because of a specific interest in the DNS. The ALSes, in turn, have their own members which results in a healthy collection of members in the overall At-Large community.

Grassroots organizing involves people being drawn together by something they have in common, which has both personal and community consequences. They grant themselves the authority to solve the problems they face or create the future they desire.

Here are the key principles:

1. **Community-Centered:** Grassroots organizing starts from the ground up, empowering everyday people to address local issues.
2. **Collective Action:** Individuals unite to advocate for change, whether through fundraising, petitions, canvassing, or protests.
3. **Relationship Building:** It's about connecting with people, mobilizing resources, and taking action together.
4. **Empowerment**: Grassroots efforts empower people to take control of their lives and create positive change

Collective action lies at the heart of any vibrant civil society because civic engagement requires individuals to work together as part of a group. When people come together, they can achieve more than they could individually.

Here are some key points:

1. Community Engagement Matters:
   • Data-driven and evidence-based practices offer opportunities for impact.
   • Avoid top-down approaches; engage community members directly in social change efforts.

2. Community Power and Collective Agency:
     • Community power is about building collective agency.
     • People can be more powerful together, leading to systemic transformation.
3. Strategies for Community Engagement:
     • Organize individuals for collective action.
     • Ensure all voices are heard in inclusive decision-making.
   • These strategies build social capital and foster change.

In summary, collective action and community engagement empower people to create positive change by working together.

The At-Large Loop

The At-Large Loop Project is intended to strengthen the At-Large community capacity for consensus building and message amplification. When you strip away all of the buzzwords, the role of the At-Large community is the Identification and Amplification of Individual End User Interests. These activities take place inside the ICANN meeting and policy development context and in direct communication with the community and the broader population of end users.

For the past several years, the At-Large community has formalized and strengthened its processes for participation in ICANN policy development and reform efforts. Virtuous feedback loops have been developed to establish positions, within the Consolidated Policy Working Group and Overhead, Finance and Budget Working Group, identify shepherds to active participation and support those volunteers through updates and feedback.

The next step is to strengthen our outbound communications channels to establish similar feedback loops to both broaden our base of opinions when forming policy and broaden our reach with educational or promotional campaigns. This will involve experimentation with various communication tools as well as procedural discussions for eventual compilation into this "Campaign Playbook."

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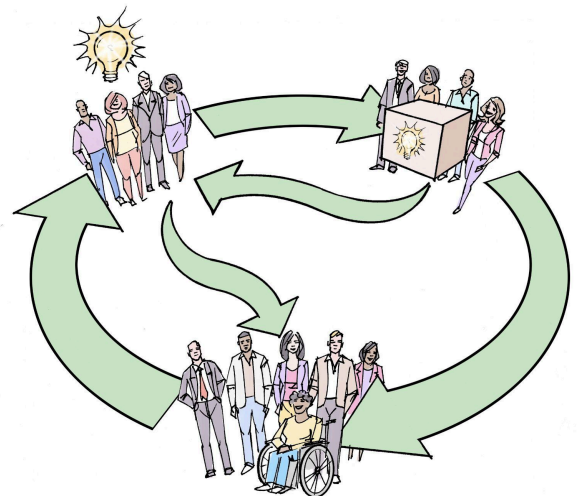
A Manual for At-Large Volunteers

The primary audience for this "playbook" are the volunteers that make up the At-Large Community, particularly its elected leaders. Ideally, this "living document" contains the collective knowledge of the community so that those who need to launch a campaign may do so knowing they are using tried and true techniques to get the attention and efforts of the broader end user community the At-Large seeks to represent.

The Playbook is divided into 2 sections:
● Campaign Purposes
● Amplification Campaign

Campaign Purposes

There are two broad purposes for campaigns: identification and amplification.

Identification Campaign

An identification campaign, initiated by the CPWG, is an attempt to broaden the participants in a position development discussion, beyond the "usual suspects" of the CPWG. There are essentially 4 possible levels of expansion: to the RALOs, to the ALS leaders, to the ALS members and to the broader end user population. The CPWG should determine the level of DNS familiarity required for input on a particular issue and determine the level of campaign accordingly. For example, if significant familiarity with ICANN and its policies is required but there are possibly regional implications to the position taken by the ALAC, the CPWG should endeavor to get formal input from the RALOs. If a particular topic can be easily explained to those with more limited understanding of the DNS, then some sort of briefing on the topic should accompany a survey, intended for ALSs and perhaps their members. This was the case, for example, with the GEONAMES issue. Finally, if the topic can be made clear to the uninitiated then outreach may take place to the broader end user population via a formal survey, as was the case with the pilot IDN Survey in India. The CPWG has a process of position development so this would require adding a formal step to identify the level of familiarity required to provide useful input.
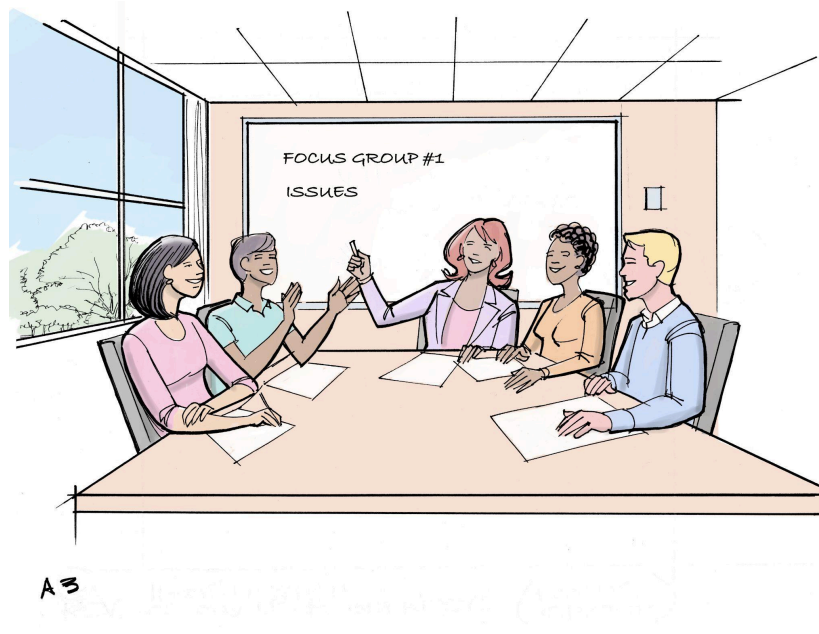
Amplification Campaign

While feedback may occur, the primary goal of an amplification campaign is education and advocacy. Ideally, such campaigns would originate with the ALAC. An education campaign could be set in motion to teach end-users how to protect themselves from and report phishing attacks. An advocacy campaign could be used to promote change such as universal acceptance or the adoption of DNSSEC.

The ALAC should form a Community Engagement Committee or Community Mobilization Committee to field proposals from ALAC members for possible campaigns and make proposals back to the ALAC for final approval. This committee would take the place of the existing ALAC committee for Outreach and Engagement.
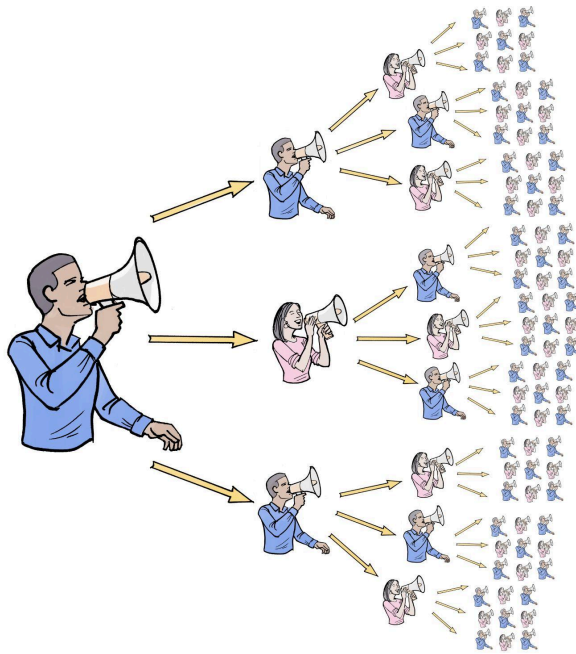
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Campaign Models

For both campaign "purposes," there can be multiple forms of campaigns, including Email Alerts, Phone Tree, Social Media, Webinar, Seminar and Conference Participation. The At Large Loop Project is designed to experiment with different form or models of campaigns to identify what works and what does not as well as how best to generate materials and activity around a particular type of campaign. Ideally, each of these experiments would include some measures of success and metrics so that the relative value vs the effort of each model can be memorialized into the Campaign Playbook.

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Email Alert

Perhaps the simplest form of campaign is an email alert, intended to engage the broader community to solicit either feedback or action on a particular topic. An email alert could be standalone with all the intended information embedded in the email or provide a series of links to outside resources such as videos, Zoom invites or surveys. An email alert would ideally go out to the At-Large list and also to RALOs, with the expectation that it would, in turn, be forwarded to the ALSs who might, in turn, forward to their members, depending on the complexity of the issue.

Some possible ways to measure success would be to have some sort of call to action, such as watching a video, filling out a survey, etc., where statistics could be gathered.

Case Study – Email Alert on Identifying and Reporting Malicious Behavior

Requestor: ALAC
Campaign Purpose: Education
Campaign Model: Email Alert
Call to Action: None
Metric(s): Click through to tutorial videos
Regions: All
Languages: English, French, Spanish
Success: Minimal

DOI – CASE STUDY

ED COOK

Background
The ALAC was interested in seeing two new tools, developed by the ICANN contracted parties, introduced to end users, ACID and NetBeacon.

Execution
Tutorials were created in English, French and Spanish and an email composed to showcase the value of these tools as well as a phishing identification quiz, created by Google. The email was sent to the At-Large general list.

Results
The results were sub par with only X% of recipients clicking through all three links while X% clicked through to at least one.

Conclusion
While more experimentation is needed, it would appear that the At-Large General List is not a particularly "hot" email list, filled with volunteers prepared for a call to action.

Phone Tree

In this type of campaign the RALO leaders are asked to reach out personally to ALS leaders, usually by phone and ask again if they would, in turn, reach out *personally* to some of their members. This is a highly retail activity that requires personal relationships to be effective but, in the case of those relationships, can have the most impact. This type is especially useful if the "ask" is more involved.

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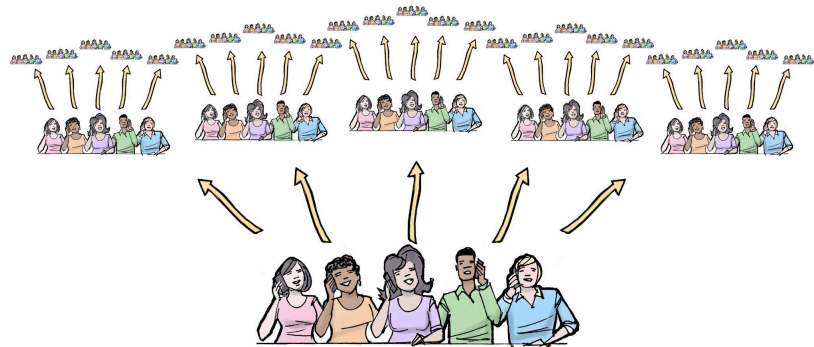
Social Media

This is perhaps the most normal method of outreach and, to date, has not been particularly effective. As numbers increase and incentives are in place, conditions will improve. In the near term, a social media "campaign" is likely to include some paid promotion and some variation on the phone tree methodology to have real impact.
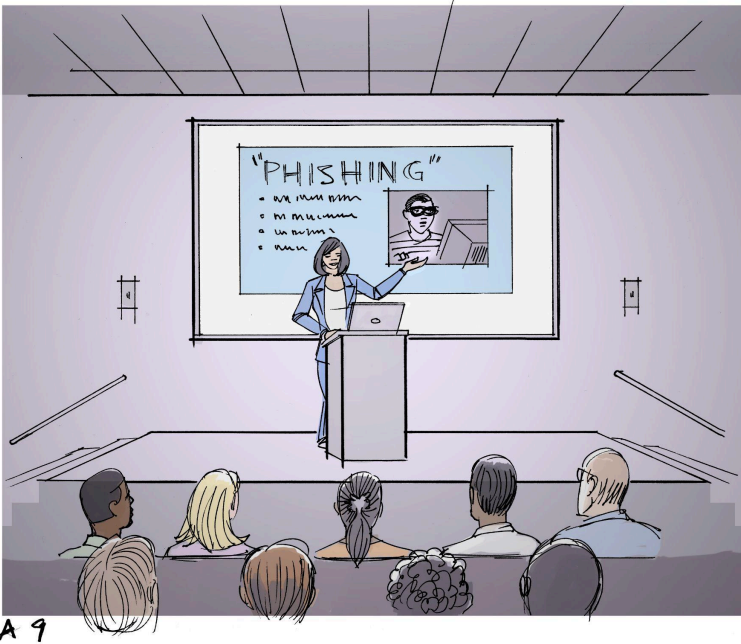

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Webinar

Webinars are perhaps the most frequently used technique for education and advocacy, by the At-large community. Ideally, webinars would be modernized to include a measurable call to action so that there is some success metric other than passive attendance at the webinar.


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Seminar

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Here the idea is to duplicate the efforts by the UASG to create pre-packaged "event in a box," for delivery at the RALO and ALS level. In their ideal form, such boxed events would include:

- Professional quality slides
- Script for the slides
- Recording of the slides being delivered with a Q&A
- Customizable Promotional resources (fliers and video)
- Budget for food and beverage

Ideally, these resources would be available in multiple languages.


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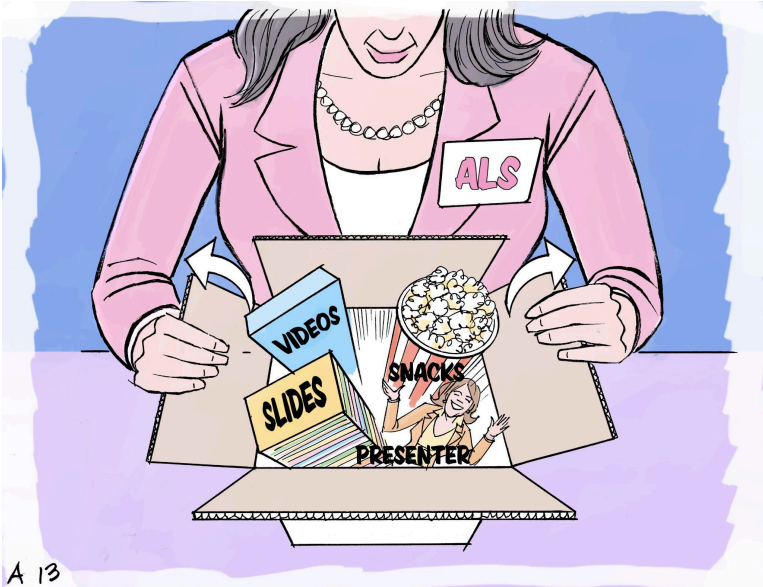
Conference Participation

There may be times where the best strategy is to find people where they are, rather than trying to draw them in. For example, with DNSSEC, a presentation as a local web development conference might be more effective than a seminar promoted by an ALS. However, the same principle applies. Ideally, we would generate a slideshow, script and recorded demo for purposes of widespread delivery. These resources could be the result of a seminar campaign or be created specifically for a conference oriented campaign. [Side note: While "outreach" (ie recruiting) is the purview of the RALOs and one of the primary uses for CROP funding, such efforts would be improved greatly by presence on the conference program and the delivery of a professional grade presentation on a topic of interest to the audience.

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APPLICANT SUPPORT
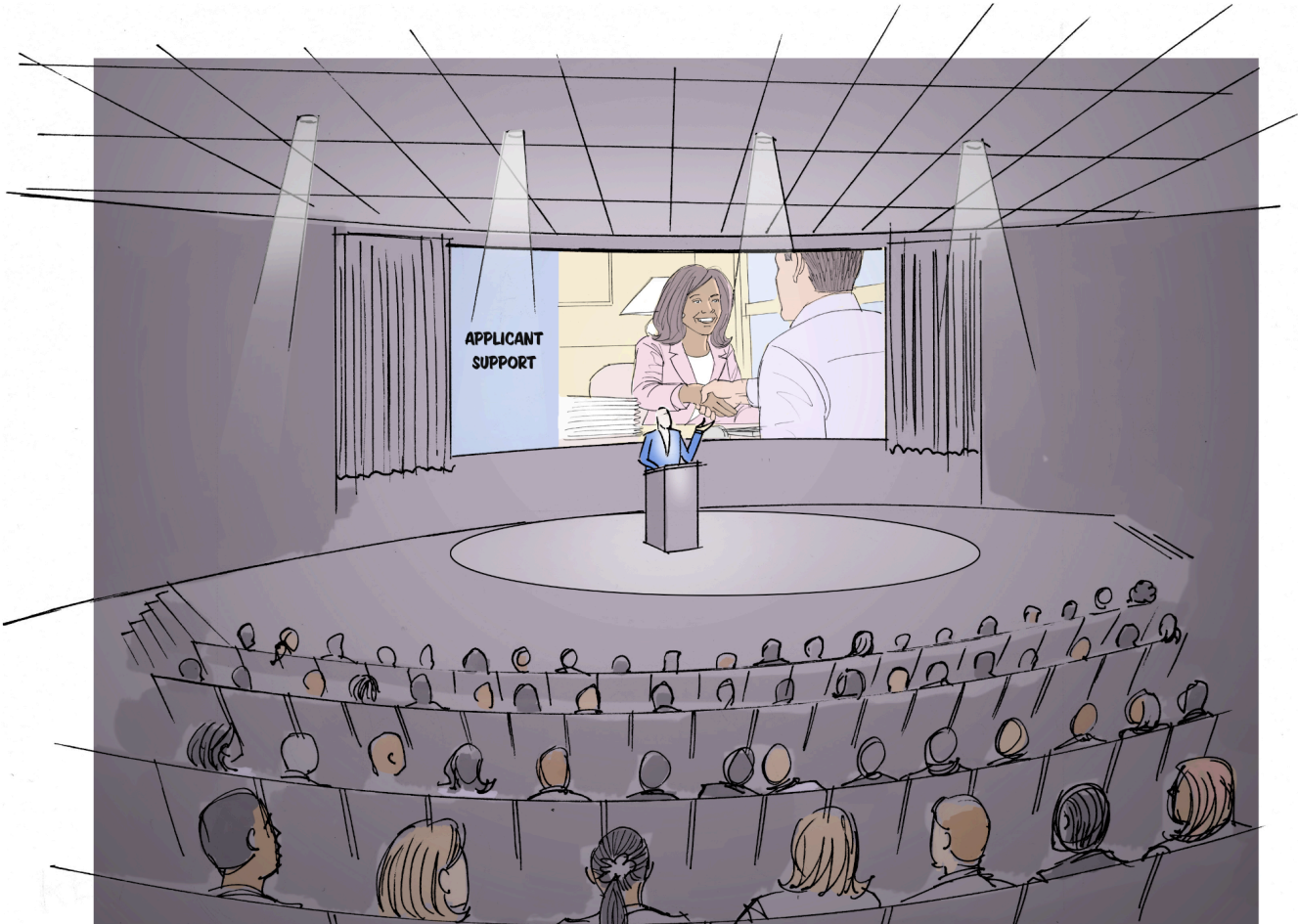
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Campaign Organization

There are two primary ALAC subcommittees, engaged in the evaluation and execution of At-Large Campaigns: The Community Engagement Subcommittee and the Capacity Building Subcommittee. Generally speaking, requests for campaigns come to the CEWG for evaluation, which in turn makes recommendations to the ALAC for approval. Once a campaign is approved by the ALAC, it is socialized with the RALOs for any region-specific feedback. Once the broad strokes are established the CEWG manages the execution of the engagement campaign, including the development of metrics for success.

Fig X. Email Alert Evaluation and Execution Process Flow
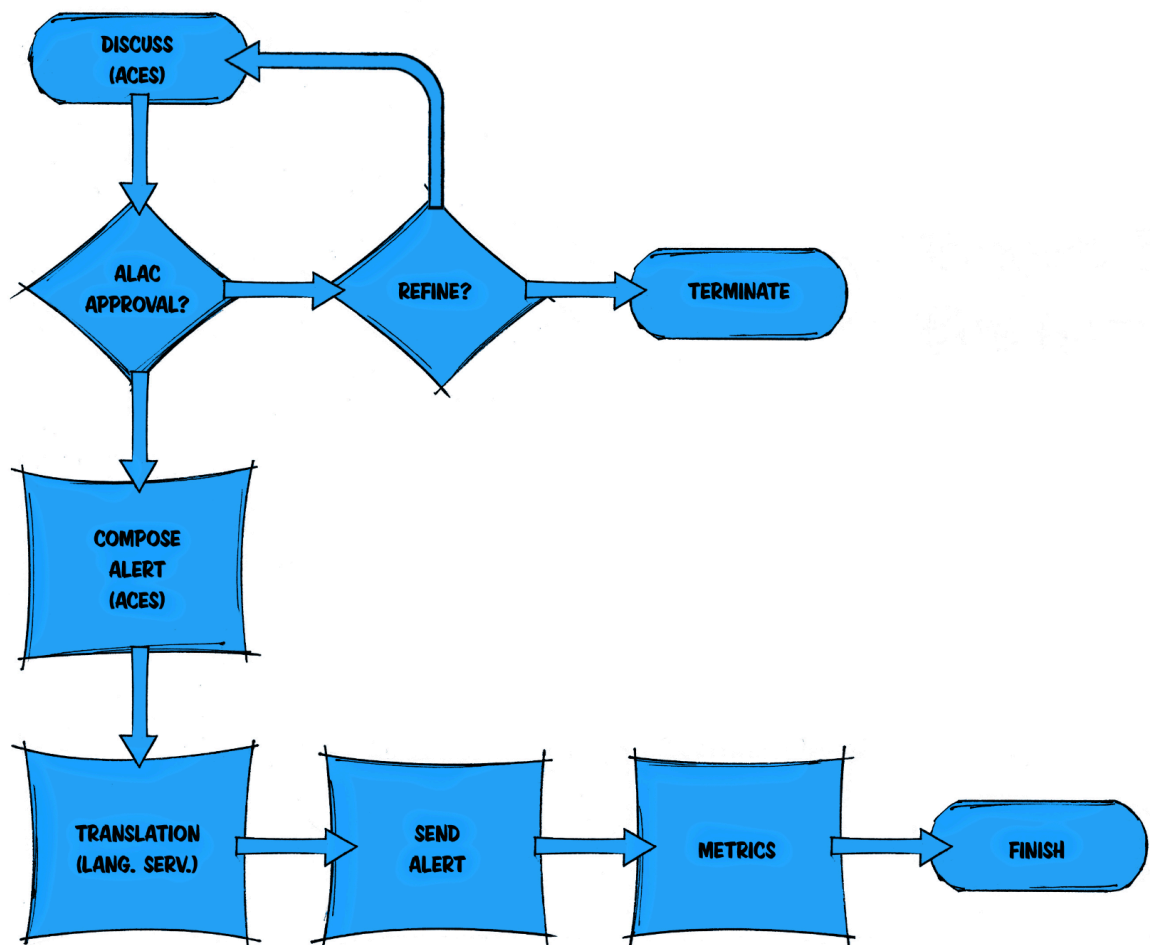

C1 – EMAIL ALERT WORKFLOW

Fig X. Phone Tree Evaluation and Execution Process Flow
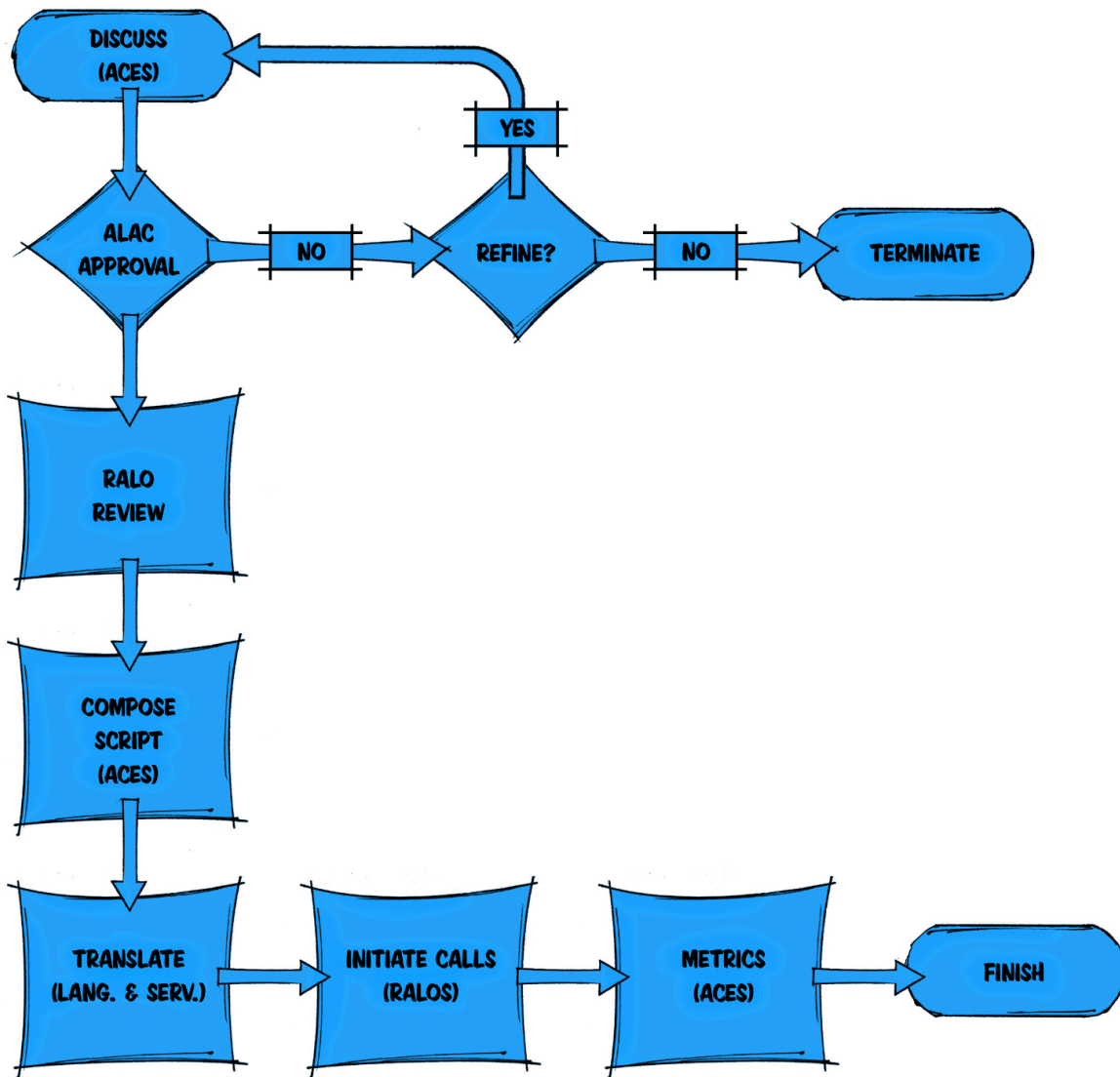

C2 – PHONE TREE WORKFLOW

DISCUSS (ACES) → ALAC APPROVAL
ALAC APPROVAL → NO → REFINE?
REFINE? → YES → DISCUSS (ACES)
REFINE? → NO → TERMINATE
ALAC APPROVAL → RALO REVIEW
RALO REVIEW → COMPOSE SCRIPT (ACES)
COMPOSE SCRIPT (ACES) → TRANSLATE (LANG. & SERV.)
TRANSLATE (LANG. & SERV.) → INITIATE CALLS (RALOS) → METRICS (ACES) → FINISH

Fig X. Webinar Evaluation and Execution Process Flow

C3 - WEBINAR WORKFLOW

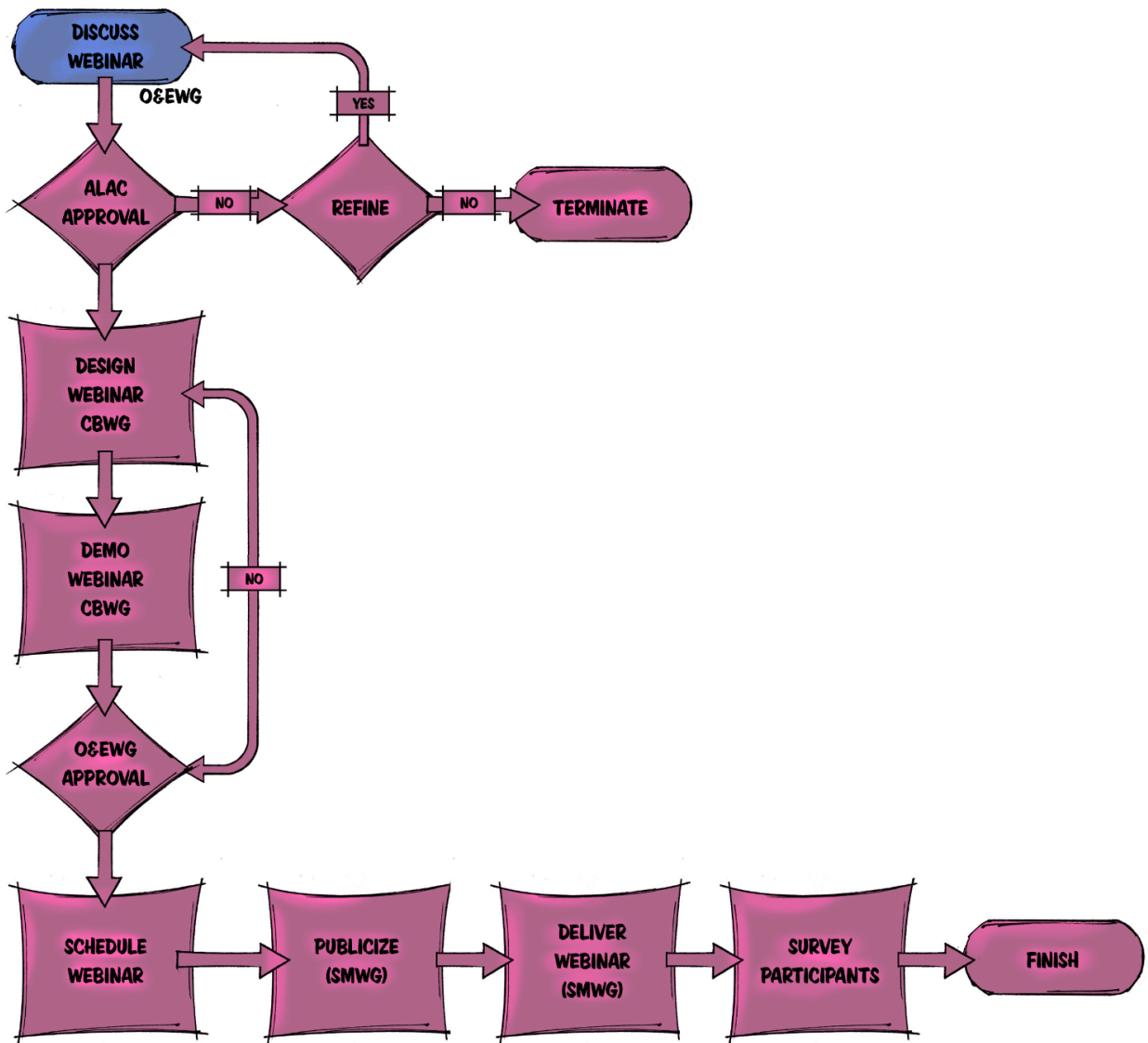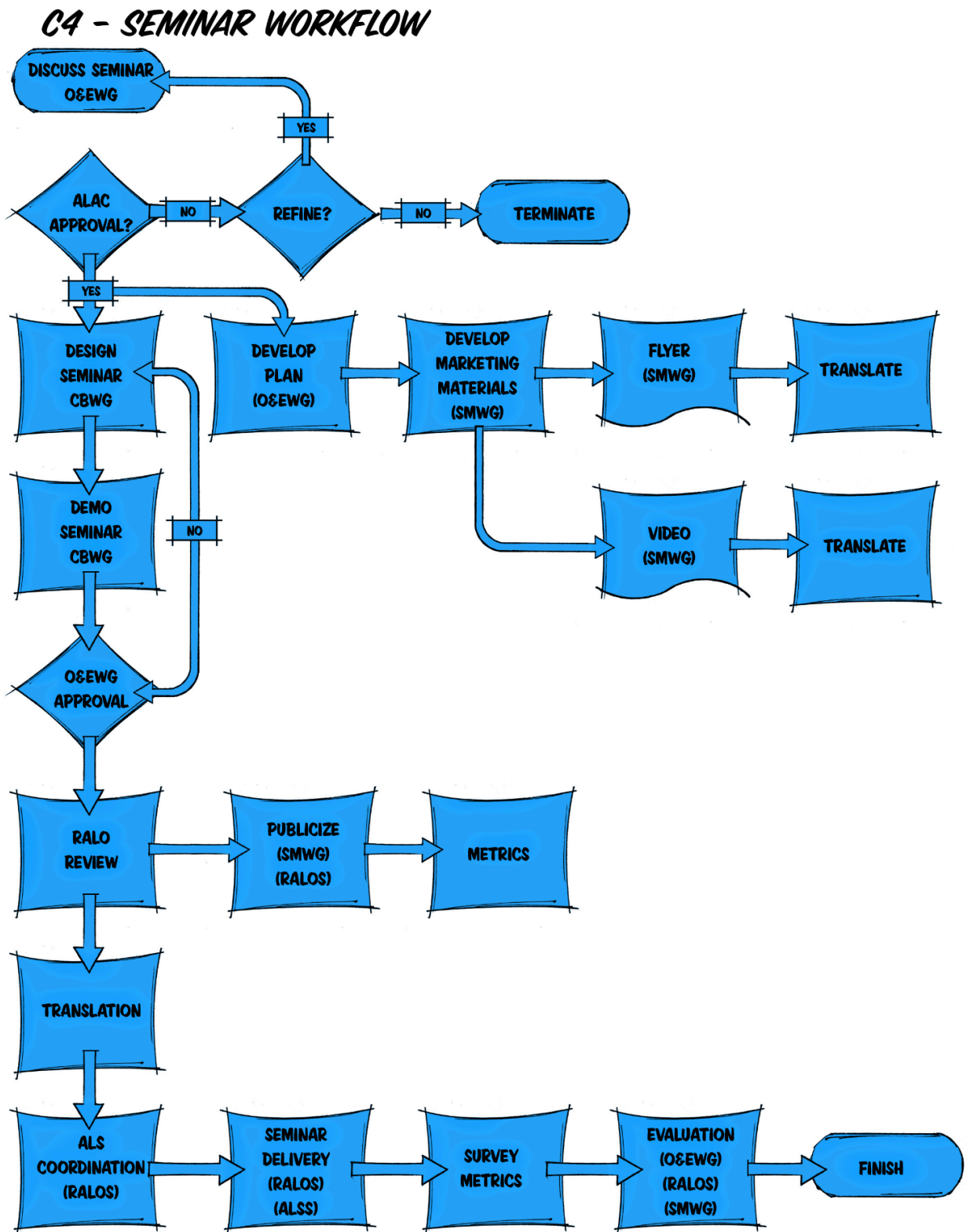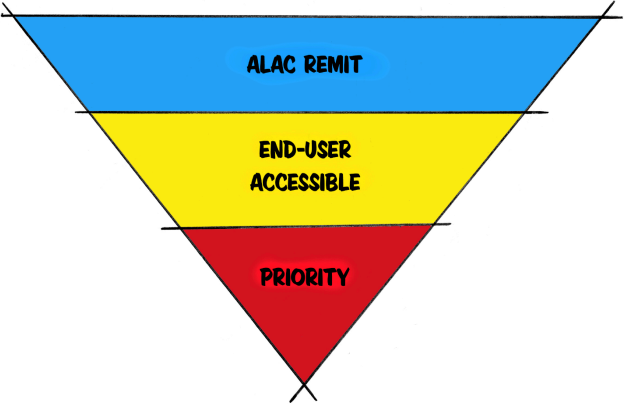Fig X. Seminar Evaluation and Execution Process Flow

C4 - SEMINAR WORKFLOW

Campaign Request Evaluation

Requests for engagement are evaluated by the CEWG based on relevance to the end user community and the remit of the ALAC.

Campaign Audience Evaluation

Ultimately the audience for At-Large Campaigns are the end users themselves but in some instances there might be a further audience, meant to be reached by the user in the campaign.

In a feedback or education campaign, the user is the terminal audience. However, In some cases, with a message amplification campaign, there might be a further audience.

For example, in the case of Universal Acceptance, the ultimate audience are the owners of websites and email software. The campaign is meant to inspire everyday end users to perform their own outreach to this ultimate audience.

Capacity Building WG

The Capacity Building Work Group (CBWG) is a sub-committee of the CEWG and is responsible for the development of materials, as needed, for engagements. This could be as simple as designing social media graphics for a messaging campaign to developing courseware for an educational engagement, for example on Phishing. The CBWG would engage ICANN Language services for translation of the developed materials.

Campaign Success Evaluation

Measuring the impact of an outreach campaign is crucial for a grassroots organization to understand the effectiveness of their efforts and to make informed decisions for future campaigns. Here are some strategies that can be used:

1. **Monitor and Measure Your Impact**: Regularly assess your campaign's progress and effectiveness. Use key performance indicators (KPIs) to track metrics like voter turnout, volunteer engagement, and fundraising goals[1].
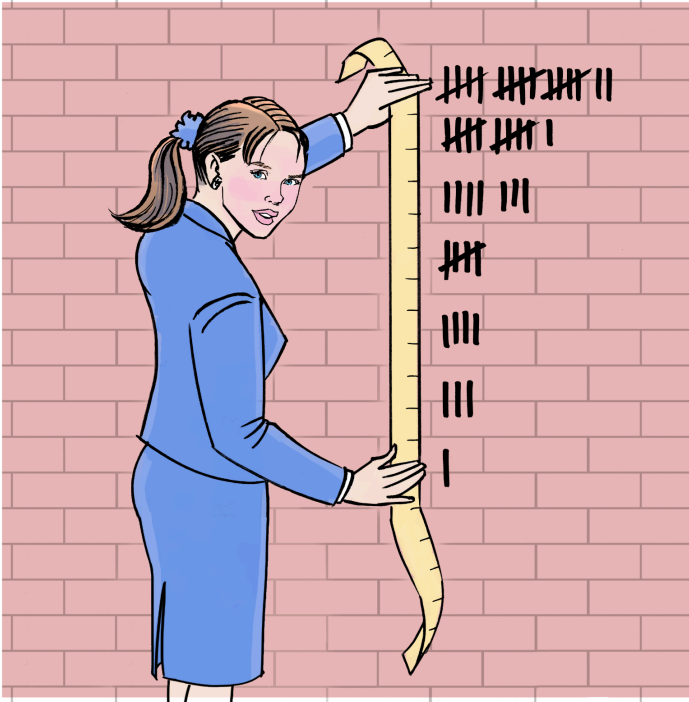
2. **Use Surveys, Interviews, and Focus Groups**: These tools can be used to gather qualitative data from your target audience and stakeholders. They can provide insights into how well your message is being received and the changes in attitudes or behaviors as a result of the campaign

1. **Observation**: Direct observation of community activities can provide valuable insights into the impact of your outreach efforts[2].
2. **Data Analysis**: Analyze the data collected through various means to identify what's working and what needs improvement[1].
3. **Engagement Rates**: This includes the number of people attending your events, signing up for your newsletters, following and engaging with your social media posts, etc[3].

4. **New Advocate Sign-ups**: The number of new advocates or volunteers that have joined your cause as a result of the campaign[3].
5. **Messages Sent by Legislative District**: If your campaign involves political advocacy, tracking the number of messages sent to representatives by district can be a useful metric[3].
6. **Email Clickthrough Rates**: If email marketing is part of your campaign, the clickthrough rate can give you an idea of how engaging your content is[3].

Remember, the goal of measuring impact is not just to prove the success of the campaign, but also to learn and improve future outreach efforts1. It's important to be transparent about the results and use the insights gained to drive continuous improvement.

Best Practices

- **Ethical considerations**: Always conduct your campaigns with integrity and respect for the audience. This includes being transparent about our intentions, respecting privacy, and avoiding manipulative tactics.
- **Ensuring inclusivity and diversity**: Make sure campaigns are inclusive and represent the diversity of our community. This could involve using inclusive language, featuring diverse voices, and ensuring accessibility for people with disabilities.
- **Maintaining transparency and accountability**: Be open about your campaign goals, strategies, and results. This builds trust with the audience and holds us accountable for our actions.
- **Continuous learning and improvement**: Always be open to learning and improving. This could involve regularly soliciting feedback, conducting post-campaign evaluations, and staying updated on best practices in campaign execution.
- **Collaboration and partnerships**: Collaborating with other organizations or influencers can help amplify the message and reach a wider audience. Be sure to choose partners who align with our values and goals.
- **Engaging storytelling**: Stories can be a powerful tool for engaging the audience and conveying the message. Use compelling narratives to connect with the audience on an emotional level.
- **Data-driven decision making**: Use data to inform campaign strategies. This could involve conducting audience research, tracking campaign metrics, and using data to evaluate campaign success.
- **Consistent branding**: Ensure campaign materials are consistent with At-Large organization's branding. This helps increase recognition and trust among your audience.

Remember, these best practices are not one-size-fits-all. They should be adapted based on the specific context and audience.

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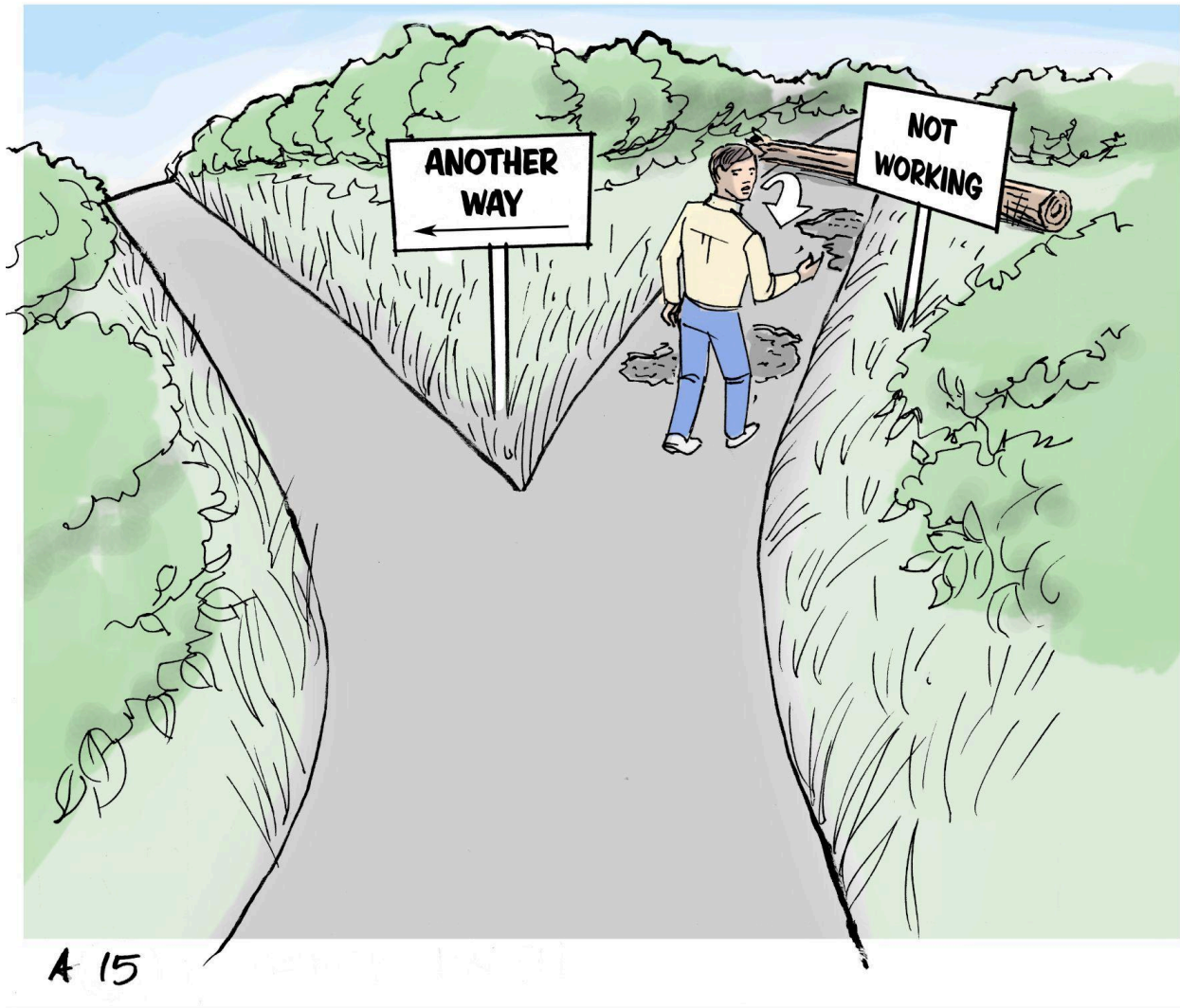
Pitfalls to Avoid

Some common pitfalls to avoid during campaign execution:

1. **Lack of Clear Goals**: Without clear, measurable goals, it's difficult to gauge the success of a campaign. Make sure your goals are specific, measurable, achievable, relevant, and time-bound (SMART).

2. **Ignoring the Target Audience**: Not understanding or considering the needs, interests, and behaviors of your target audience can lead to ineffective messaging and low engagement.

3. **Inconsistent Messaging**: Your campaign message should be consistent across all communication channels. Inconsistent messaging can confuse your audience and dilute your campaign's impact.

4. **Neglecting Feedback**: Ignoring feedback from your community can lead to missed opportunities for improvement. Always be open to feedback and willing to make necessary adjustments.

5. **Poor Timing**: Timing is crucial in campaign execution. Launching a campaign at a time when your audience is most likely to be receptive can greatly increase its effectiveness.
6. **Lack of Follow-Up**: After the campaign, it's important to follow up with your audience. This could be thanking them for their participation, sharing the results of the campaign, or asking for feedback.
7. **Not Evaluating Success**: If you don't evaluate the success of your campaign, you won't know what worked and what didn't. Use the metrics you defined in your planning stage to measure success and inform future campaigns.

Avoiding these pitfalls will help ensure your campaign is effective and achieves its intended goals. Good luck!