

TOOLS AND TACTICS FOR ONLINE AND OFFLINE PMO STRATEGY

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The following recommendations were originally included as an appendix to the Open Society Foundations' briefing paper, "Parliamentary Power to the People: Analyzing Online and Offline Strategies in Latin America." They were compiled with the help of numerous people, including Open Society Foundations consultant David Sasaki, Andrew Mandelbaum of the National Democratic Institute, Tiago Peixoto of the World Bank Institute, Cristiano Ferri of the Brazilian Chamber of Deputies, David Moore of the Participatory Politics Foundation, Joshua Tauberer of PopVox, and Tony Bowden of MySociety.

As discussed throughout the principal document, "Parliamentary Power to the People: Analyzing Offline and Online Strategies in Latin America", tactics and tools such as the ones listed below can replace neither strategy nor offline outreach. Nor are all of the listed tactics appropriate for every PMO. It is important to adopt tools on an as-needed basis.

Optimize: Most traffic comes from searches, even in the case of the world's leading PMOs. Optimization strategies should be a top priority for all PMOs using informatics. Seeking out grants or free collaboration from technology companies – e.g. Google – is a low-cost means of increasing reach. Ensuring PMOs are cited in Wikipedia and other reference websites, including allied NGO websites, can also help drive traffic to PMO websites.

Time: Certain events – elections, national commemorations, scandals, or crises – ignite exponential interest in politics. This is the time for PMOs to lead. PMOs should focus on outreach and public relations, and may consider creating relevant applications or tools, such as a survey or candidate-matching tool for elections.

➔ **Temporal Context:** A different 'time' consideration is the analytical division of 'approved legislation, under consideration, and pending' on PMO websites. Dividing legislation by temporal indicator may help users to better navigate sites. The age of legislation may also provide important clues as to its relevance.

Praise: PMOs may try to remain politically neutral, but their user comments and the general use of these sites may convey to politicians that they are adversarial. PMOs should consider awarding prizes to legislators for different measures of performance. They should also try to establish constructive working relationships with Congress more generally, through praising innovative or principled parliamentary behavior. Engaging with parliamentarians will be covered further on.

Specialize: Instead of providing dozens of functionalities on one website, dividing them up into single-functionality platforms with unique URLs may be more cognitively attractive for users. The leading example is mySociety's websites: Theyworkforyou.com, writetothem.com, whatdotheyknow.com, and so forth. Chile's Ciudadano Inteligente has also been following this strategy.

Share: Although obvious, it bears repeating that social media should be employed pervasively as a communication tool. Websites such as facebook, twitter, youtube, scribd, flickr, and tumblr provide useful vehicles for message dissemination. It should also be noted that ‘sharing’ is more about interacting with the general political ecosystem than just about single-minded self-promotion, which can turn people off.

Plug-in: Use social media plug-ins to up the exposure of conversations taking place on your platform.

Visualize: Visualizations fall into two categories: ready-made, and do-it-yourself. Dedicating one page of a website to providing ready-made visualizations of some of the most important indicators of legislative activity may provide a great resource for bloggers, journalists, teachers, and policy-makers. These visualizations might also provide code, so they can be embedded on websites and updated automatically through scripts. Do-it-yourself visualizations can also be useful. The World Bank’s Open-Data Catalogue stands out as an example (<http://data.worldbank.org/>). Data is selected by the users, who are then able to create visualizations.

Alert and Inform: Newsletters and tracking alerts should be integrated into all PMO sites, providing the option to receive information as emails, RSS, SMS, by Twitter, posting to Facebook. Many PMOs integrate this functionality, which is typically based on keywords (e.g. politician X, or issue Y). Keyword parsing should be applied not just to what bills come up on the legislative agenda, but also which bills are spoken about during debate – a tactic pioneered by mySociety.

Pull: Users often prefer to be ‘pulled’ to sites by email newsletters, feeds, tweets, or facebook posts by website administrators. A strong ‘pull-strategy’ also means making sure sign-up boxes and Twitter handles are prominently displayed on other information sources of relevance to the parliamentary process. This could mean news media websites, blogs, etc.

Engage: Multiple engagement tools, such as quizzes, opinion-solicitation, surveys, liking, and comment-ranking help citizens engage with the website. These engagement tools render a site more than a passive information source.

Evaluate: Furnish a space for users to post statements made by leading politicians and have others vote on their truthfulness or accuracy. Fact-checking websites may be recruited to take part in such initiatives.

Specify location: Users should be able to obtain a short and uniform URL linking every element on a website, such as a vote or committee session. Easy and precise linking is critical for relaying information over social media channels, such as Twitter. It also helps up your search engine optimization scores.

Illustrate with pictograms and pictures: The way PMOs display legislation tends to be confusing and boring. Pictograms may help. If it's a health bill, put a picture of a red-cross or a stethoscope. If it's an education bill, put a picture of a chalk board or graduation cap. Legislation is technical, and while necessary, the codes placed beside bills – e.g. h.r.1072 – triggers memories of civics class or the complexity of politics. Another aspect of pictures is screenshots. Integrating screenshot tools onto PMO websites may also be a good idea. This would permit users to take a picture of the page and

upload it to a blog or send it by email. Several programs can be integrated into websites, such as Snapcasa and Gyazo.

Webcast: Putting offline events online is a great way to draw interest and visitors. Videos are an under-utilized medium on PMO sites. Placing videos on Youtube is also much under-utilized.

Translate: Foreigners should to some extent be able to understand your single-language website – even if current translation tools are far from perfect. Google translation is embeddable.

Comment and annotate: Being able to place a comment below a website element (‘comments’) or on an element – such as a bill – (an annotation) will help people better understand the repercussions of legislative activity. Annotations and comments should be searchable by different tags, such as date and issue, and users must be able to hide annotations if they wish to read a ‘clean’ text. An example of a helpful tool is <http://www.documentcloud.org/home>

Match: Permitting voters to find the best candidate by matching their preferences on an online survey can be a politically useful exercise and, as mySociety and other PMOs have reported, such matching exercises tend to appeal to people. EU Profiler provides an example of a matching tool (<http://www.euprofiler.eu/>)

Write: Letter-writing tools help constituents put together letters to their representatives, and then send them. Writetothem.com is a leading example.

Group: In the style of a Google Groups, PMOs facilitate the meeting of minds interested in similar policy or political issues. A leading example is provided by OpenCongress.org.

Wiki: In order to help people understand legislative activity, OpenCongress.org has begun to work with wikis, which look at different elements of legislative activity.

Suggest: Many websites integrate feedback widgets into the side or bottom of their websites. These tools can help PMOs improve functionality. Third-party services, such as Uservoice can also be helpful.

Embed: PMOs should provide a list of embeddables at a PMO site, or specific widgets associated with specific laws. By pasting code into a blog entry, for example, supporters of a bill can see how many people have supported or opposed a bill or can encourage others to take a stand on an issues. Popvox provides a leading example (<https://www.popvox.com/> see <http://bit.ly/pxJiUD> at the bottom of the screen). PMOs should reach out to NGOs, encouraging them to place these embeddable widgets on their pages.

Support / Oppose: Voters should be able to support or opposed legislation on the website. Totals are then displayed. Supporters and opponent interest groups and active links to their sites should also be identified alongside each bill, as discussed later on.

Map: Pioneered by Vote na Web (see report), these are maps of votes cast by users and legislators according to their electoral district of origin (one map for each). They are attractive for users, helping them to visualize preferences by region.

Crowdsourcing: Crowdsourcing of legislative activity still has to be fully explored, but activities might include the analysis or summarizing of legislation, either through dedicated web forms, or by

establishing partnerships with certain issue-based NGOs that agree to do the work. Crowdsourcing can also be deployed to monitor the legislature and legislative production by issue area (e.g. environmental legislation. See, for example, <http://www.cidadedemocratica.org.br/tour>).

Host Interns: There are never enough people to do the work of PMOs, which face great logistical challenges. Sourcing Master's or Ph.D. students – both nationally and internationally – can be a valuable means of increasing productivity, expanding networks, and linking up to funding in foreign countries. In particular, public policy or political science students from the U.S., Canada, the U.K., and Spain, among others, travel to Latin America to do research and may be happy to lend their assistance in return for contacts or tips.

Notify. Contact parliamentarians and relevant issue-based NGOs when relevant legislative or social initiatives appear on the radar. NGOs and the private sector are particularly interested in committee deliberations, which shape the details of legislation. Open Congress' David Moore also suggests notifying legislators once a certain threshold of votes or comments have been reached on bills being considered.

Quantify: How many sessions or committee meetings have legislators missed? How many staff members do they have back in their home constituencies? How much money did they raise for their election campaigns? How many legislators responded to letters sent requesting their position on a certain issue? Charting these quantitative metrics will allow visitors to use the data and promote the website. Beware of promoting perverse incentives for politicians. For instance, mySociety once publicized the number of times a legislator spoke in parliament. As a result, some parliamentarians began to make more contributions – of uncertain quality – to increase their numbers.

Qualify: Link explanations on quantitative results. These explanations should either be formulated in-house, or they might be found at the blogs of parliamentarians, on videos or within the transcripts of parliamentary debates.

Highlight: If the user conducts a search, highlight the searched terms in the resulting documents or search results (blurbs) in order to expedite his or her search process.

Aggregate: Searching by keywords in one giant document – let's say a 15 page document of a legislators speeches over the course of a year – or hyper-linking within a document is often easier than opening up dozens of documents and searching each individually. Instead of putting individual bills up one document at a time, copy them by issue area or legislator into one document. Clicking on a particular bill will bring you to a linked heading.

Link: Ensure that all elements can be traced. Legislation should be linked to politicians, committees, discussions, and supporters and opponents. The backwards and forwards linkages of legislation and politicians are especially crucial. Other elements that should be considered include:

- *Campaign finance:* Information should be made available on contributions and contributors to the election campaigns of individual legislators, and to political action committees or interest groups. This information should be associated with bills being considered or passed. Contributors tend to exercise influence over legislators.

- *Backgrounds and Relationships:* Similarly, mapping relationships may also help reveal potential conflict-of-interest. Background is the first issue. If Representative Smith worked at IBM and Cisco systems, his interest in a bill to refurbish all federal computer systems must be carefully scrutinized. The same is true of relationships. If Smith worked with closely with Joe Brown at IBM and Brown is heading up IBM's potential contract, attention must be paid to potential conflicts of interest.
- *Supporters / Opponents:* Salient supporters and opponents of a bill should be identified so citizens might have the choice of getting involved with these organizations. Links to these organizations should be made available, and perhaps a summary of what policy measures these organizations have supported and opposed in the past. Link-stinginess –the reluctance to provide external links for fear of losing visitors – is unfounded. Linking to other sites is a value-added that will create return visitors.
- *Petitions:* Similarly, groups of organizations may be attempting to accumulate signatures in support or in opposition to a policy. Links should be provided to these sites as well.
- *Media and blog coverage:* Media and blog feeds on pressing legislative issues help people to understand context. Next to a bill on logging, for example, news articles and blog posts from a diversity of sources should be made available on the subject of logging and environmental legislation.
- *Glossaries:* Legislative terms can be complicated, and PMOs should provide a glossary either in the form of a search function or as an alphabetical glossary.
- *No dead-ends:* pages should always go somewhere interesting.

Educate: PMOs ought to be actively teaching citizens that they are part of the system – part of the legislative process. People should learn about all aspects of the legislative process: from adoption, to implementation, enforcement, and reform. The approach must be holistic, and should include:

- *Getting involved:* An explanation of how citizens might get involved with the policy process, contact details for interest groups, and what elements citizens should evaluate before getting involved with interest groups. For example, citizens should be taught to look for elements such as funding transparency, metrics on how funds are used, leadership, and the achievements of interest groups over time.
- *Teaching by Modules:* Instead of trying to teach the legislative process in one explanation, PMOs ought to divide the education process into short overviews followed by different modules on how legislation is initiated, the committee process, the negotiation process, and the approval process. Cartoons, videos, and slideshows with audio are best. Organizations in different countries with similar political systems and languages might collaborate to create a series of beginner and advanced modules.
- *Using Examples:* There are many great ways of understanding the legislative process. A story looking at someone's personal interest in a bill and then the bill's trajectory is one example. Another is looking at the consideration of bills from different policy areas, because they often receive different treatments. Choosing polemical issues will help pique interest, and examples should link forwards and backwards: how do bills come about? What happens once

a law has been passed? What happens if the law is not enforced? These explanations should integrate other parts of government, such as the Executive and Judicial branches.

Collaborate: Collaborating with the NGOs, interest groups, the private sector, parliamentarians, and universities is a first-order strategy for increasing reach and measurable impact. One of the first goals should be to carry out educational initiatives to help these sectors better utilize PMO resources and understand missions. Greater details about these different types of collaboration are provided below:

- *Cultivating good relationships with the media:* Establish partnerships with like-minded media outlets. The integration of Congreso Visible's (<http://www.congresovisible.org/>) widgets into the pages of the newspaper *El Espectador* (<http://elespectador.com/>) has resulted in a massive increase in traffic (see principal document).
- *Cultivating good relationships with NGOs, businesses, and citizen groups:* Relationships should be cultivated across policy issue-areas and geographic boundaries. Organizing conferences, roundtables, forums, and umbrella groups is an important part of this sort of outreach. Sharing and exchanging databases, email initiatives, and campaigns with different organizations may also prove fruitful. Developing common tools with other organizations, such as transparency indices, is yet another collaborative strategy.
- *Cultivating good relationships with parliament:* Taking a simultaneous top-down (party leaders) and bottom-up (staffers) approach to cultivating relationships in parliament is a sound strategy. Evaluating legislators through different indices can attract political attention, but the metrics have to be well conceived and results have to be communicated respectfully. Giving representatives the first word on results is a respectful way of going about public disclosure. Inviting politicians to write editorials, keep a blog, or lead a webinar at a PMO site are other ways of cultivating good relationships. An important pre-election strategy is to use questionnaires for reaching out to legislators. Build a campaign around these questionnaires and create public pressure for responses. See Slovakia's Fair Play Alliance (http://www.fair-play.sk/index_en.php), for example.
- *Providing learning venues for parliamentarians:* Going offline in roundtables where politicians can speak freely about their concerns is a valuable undertaking. Congreso Visible (CV) in Colombia hosts roundtables among academic policy experts and politicians. It is easier for all to freely debate issues and ask tough questions without the media present, according to CV's Director, Monica Pachón.
- *Creating partnerships with universities:* Universities can help with collaborative efforts, such as data-gathering and analysis, report-writing, presentations, and promotion. Collaboration with universities can help improve the credibility of PMOs. Most importantly, working with universities means working with students, and there are few segments of society as influential as young people.